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ABSTRACT

The press for the professionalization of teachers is based on the assertion that a strengthened profession will more effectively meet students' needs and improve the overall quality of education. This volume, the third in a series of three, explains the research and design of a study that examined the design, implementation, and impact of systemic reform efforts to enhance the professionalism of educators. A comparative case-study approach was used to examine three school-university partnerships that had undertaken comprehensive reform of educator development. The reforms attempted to link preservice education and the continuous development of experienced teachers while engaging in the redesign of university teacher-education programs and schools. The sites included the Learning Consortium at the University of Toronto, the Southern Maine Partnership and the University of Southern Maine's Extended Teacher Education Program, and the Benedum Project at West Virginia University. Data were collected over an 18-month period through a series of site visits that totalled 15-20 days per site. Methods included interviews, observations, document review, and historical analysis of each site's development timeline. Data analysis involved developing a profile of each site and conducting a cross-analysis. The cross analysis identified 25 causal variables common to all 3 cases, which were used to generate causal flow charts. The analysis then assessed outcomes based on five different dimensions of professionalism and the extent to which these reforms had been institutionalized. Two figures are included. The appendix contains guidelines for recording the development of team journeys. (Contains 131 references.) (LMI)

Systemic Reform in the Professionalism of Educators

Volume III: Technical Appendix: Research Design and Methodology

Judy Swanson
The NETWORK, Inc.
Andover, MA

September, 1995

This research was supported by funds from the Office of Educational Research and Improvement (OERI), U.S. Department of Education, under Contract Number RR91172009. The content of this report does not necessarily reflect the views of OERI, the Department of Education, or any other agency of the U.S. Government.

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Preface

Volume III contains the technical appendix to The Study of Systemic Reform in the Professionalism of Educators. The study consisted of three in-depth case studies of school-university partnerships undertaking comprehensive reform efforts to educator development by attempting to link preservice education and the continuous development of experienced teachers, while engaged in the redesign of university teacher education programs and schools. The three case studies can be found in Volume II of this report. Volume I contains the cross-case analysis and major findings of the study.

Volume III contains the research design and methodology for conducting the study.

ACKNOWLEDGEMENTS

This study far exceeds the capacity of one person. It never would have seen the light of day without the cooperation of many dedicated educators in Toronto, Southern Maine, and West Virginia. Although too numerous to mention, I would particularly like to thank those who provided feedback on the initial drafts of the case studies.

OERI deserves special recognition for having the vision to fund this important series of reform studies. The NETWORK, Inc. was fortunate to have been assigned Joyce Murphy as our Project Monitor. Thank you for your support.

The expertise of our advisory group has served the project well over the course of the study. Thank you all: David Crandall, Michael Fullan, Judith Warren Little, Milbrey McLaughlin, Lynne Miller, and George Springer. Special thanks to Lynne and Judith for feedback on preliminary drafts.

The project also owes much to the contribution of colleagues at the NETWORK: to Jan Barry and Kerri Lorigan for their work throughout the course of the study; to Laurie Huberman for coding field notes; to Micheal Huberman for his assistance in developing the causal networks; and especially to Pat Cox for the initial conceptualization and groundwork, and invaluable feedback and support in bringing this report to completion.

Volume III. Technical Appendix: Research Design and Methodology

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E. Research Design

E.1 Overview

In 1992 the U.S. Department of Education, Office of Educational Research and Improvement commissioned 12 studies of educational reform. *Systemic Reform in the Professionalism of Educators*, one of the dozen, takes a broad perspective that includes both K-12 and higher education. The original "Request for Proposal" called for identification and analysis of sites exhibiting "best practices" in the areas of preservice training, inservice training, and working conditions of educators. However, many years of reform "projects" have shown that isolated pockets of good ideas rarely have lasting effects. Therefore, The NETWORK, Inc., researchers chose to concentrate on a small number of sites which, looking beyond individual reform projects, have taken a systemic approach to teacher professionalism. These sites recognize the interdependency and complexity of the education system and seek to address multiple parts simultaneously.

Educator professionalism is a critical issue in education reform. The press for the professionalization of teaching is based on the theory that strengthening the profession will prove an effective means for meeting students' needs and improving the overall quality of education (Darling-Hammond,1989). Darling-Hammond and Goodwin (1993) identified common beliefs or behaviors associated with the notion of professionalism. Members of a profession share a common body of knowledge and use shared standards of practice in exercising their knowledge on behalf of clients. In addition, they found professionals strive to:

> improve practice and enhance accountability by creating means for ensuring that practitioners will be competent and committed. Professionals undergo rigorous preparation and socialization so that the public can have high levels of confidence that professionals will behave in knowledgeable and ethical ways. (p.21)

Educator professionalism promises to increase accountability for meeting students' needs, in exchange for the deregulation of teaching — giving teachers greater autonomy in determining what is to be taught, when, and how (Darling-Hammond, 1989). Devaney and Sykes (1988) remind us that "professionalism is a form of liberty that is not simply conferred; it is earned" (p. 4). Accountability must be provided by rigorous training and careful selection, serious and sustained internships for beginners, meaningful evaluation, opportunities for professional learning, and ongoing review of practice (Darling-Hammond, 1989).

The group of educators which has been the focus of attention in the professionalization movement to date has been teachers. The professionalism of all educators, however, is the goal, including school and district administrators, specialists, counselors, and university faculty and administrators.

E.2 Scope of the Study

School-university partnerships have been around a long time (e.g., Havelock, Cox, Huberman, & Levinson, 1982). Historically the focus has largely been to support practicum placements for student teachers and to provide staff development services for veteran teachers. Partnership arrangements are becoming more prevalent as a means of improving the preparation of future teachers and the ongoing learning of experienced teachers.

Although there are examples of successful partnership working to restructure both teacher education and schools[1], school-university partnerships engaged in reform of the entire system are not common. Few partnerships have moved beyond reform of individual schools and the teacher preparation program to take on the challenge of changing the structure and culture of schools, school districts, teacher education, colleges of education, and even the university as an institution. Many studies of systemic reform (O'Day & Smith, 1993; Fuhrman, S., 1993) overlook the role

of higher education in reform of "the system." While there is currently no agreed upon definition of systemic reform, most definitions assume that:

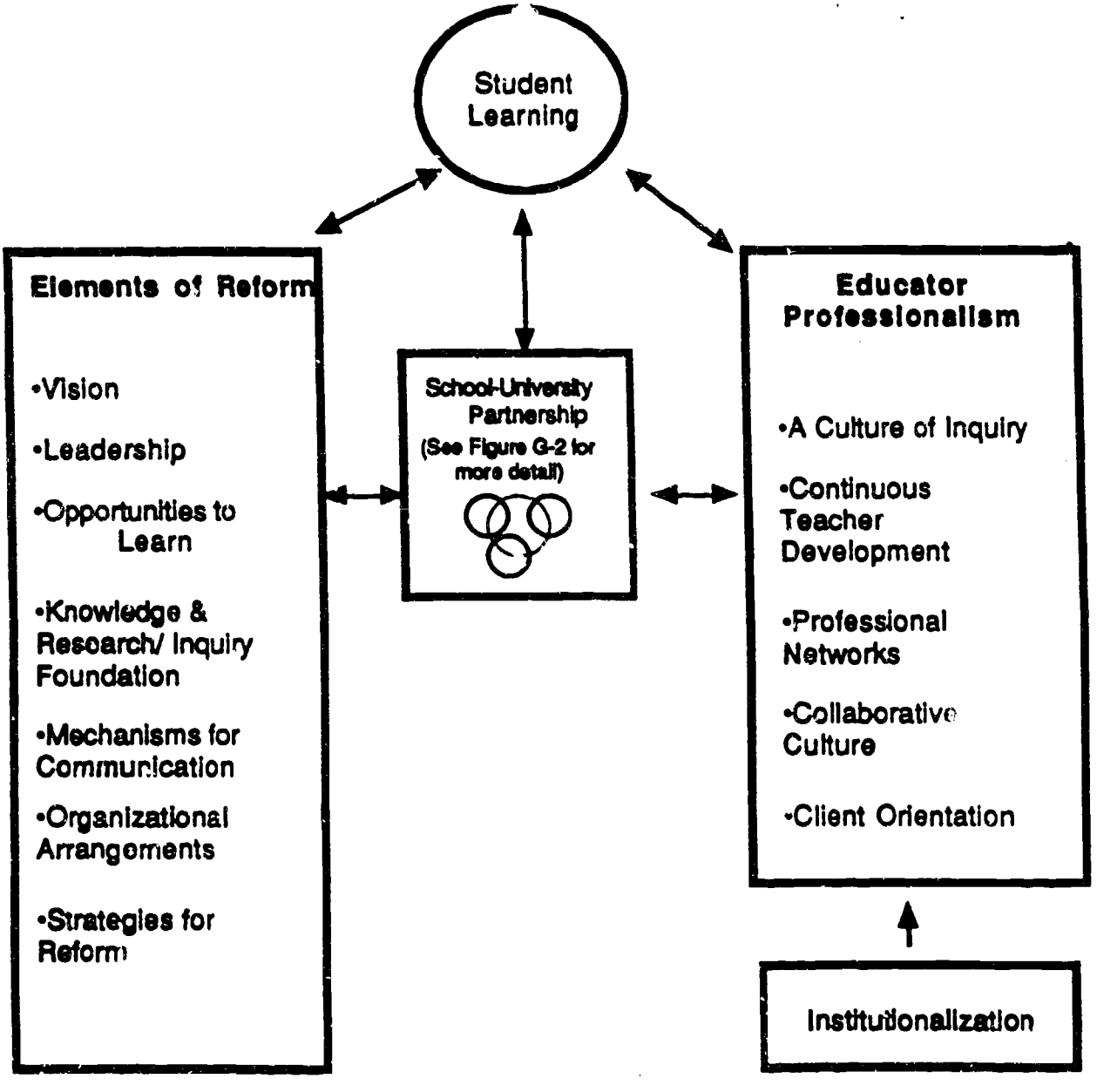
- Systemic reform addresses all of the mutually reinforcing structures, processes and activities within the educational system, recognizing that altering any one part of the system necessarily impacts on all other parts (Smith & O'Day, 1991).
- Systemic reform requires system coherence through the integration of policy and practice (Fuhrman & Massey, 1992; Fuhrman, 1993).
- Systemic reform constitutes a "mainstream activity" of all organizations involved, not an alternative or special program;
- Systemic reform requires strategies that help develop and mobilize the conceptions, skills, and motivation in the minds and hearts of scores of educators (Fullan, 1994).
- Systemic reform requires the development of routine mechanisms for bringing people together across roles, within and across organizations, for developing and maintaining shared direction and understanding; and to maintain strong communication among all of the constituent parts of the system.
- Systemic reform in education addresses the preparation, continuing learning, and working conditions of school-based, district-based and higher education-based educators in all roles — teachers, principals, counselors, specialists, para-professionals, central office and higher education personnel.

The phenomena we are observing are not well understood, especially at the level of organizations. The same work can take myriad forms in actual practice. It was thus necessary and appropriate to take an exploratory approach in this study to begin to understand the phenomena of systemic reform in a manner that captures the essence of the problems, the nature of the solutions attempted, and the evolving story of successes and failures enroute.

E.3 Conceptual Framework

Figure 1 portrays the conceptual framework used for studying systemic reform in the professionalism of educators. The design of the study was focused by the school change literature (Fullan, 1991; Fullan & Miles, 1992; Louis & Miles, 1990) which has identified critical elements of reform (left box in Figure 1). The critical elements examined for each case include: a) the visions guiding the reforms; b) the leadership driving them; c) the knowledge and research/inquiry foundation upon

Figure 1. Conceptual Framework for the Study of Systemic Reform in the Professionalism of Educators



which they are built; d) the opportunities for learning needed to sustain them; e) the mechanisms for communication used to coordinate them; f) the organizational arrangements designed to support them, and g) the strategies used to implement them. These elements of reform can be thought of as independent variables — those variables expected to be critical in each reform effort that would facilitate understanding each initiative.

Student learning was conceptualized as both an independent and dependent variable in the framework. It represents a vision of what successful leaning for all students would look like, as well as an outcome measure of student learning. A focus on student learning served as an important site selection criterion. A vision of successful student learning was found to be a motivating force for undertaking each of the reform initiatives Limited outcome data are available, as each of the sites continues to struggle with how to document whether or not their efforts are making a difference for kids. An independent assessment of the impact of these reforms on student learning was beyond the scope of this study.

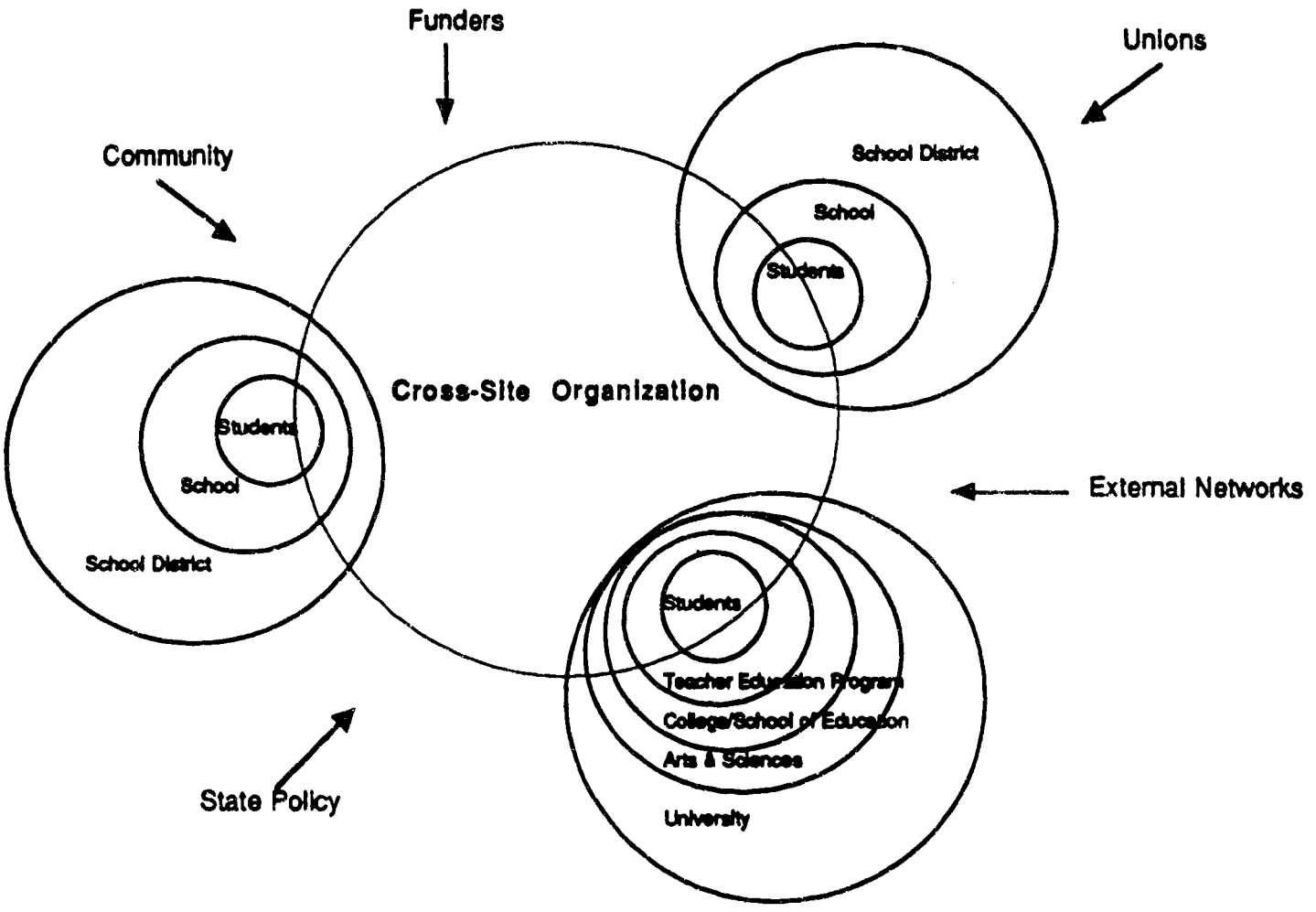
Educator professionalism is the overall dependent variable (the box on the right of Figure 1). The theory underlying the press for educator professionalism, according to Darling-Hammond (1989), is that strengthening the structures and vehicles for creating and transmitting professional knowledge will enhance educators' ability to meet the needs of students and improve the overall quality of education. The theory is based on a conception of teaching as complex work requiring specialized knowledge and judgment in non-routine situations, and on a conception of learning as a highly interactive and individualized process. The outcomes of interest in this analysis are five different dimensions of educator professionalism: 1) a culture of inquiry; 2) continuous teacher development; 3) the

development of collaborative cultures; 4) expanding professional networks; 5) and client orientation. The way "client orientation" is used here does not imply an asymmetrical, hierarchical relationship where an expert provides services to those lacking in knowledge or skills. All educators serve multiple clients, including children, parents, the community, colleagues, student of teacher education, as well as the teaching profession as a whole. Finally, the analysis examines the durability or "institutionalization" of these reforms.

School/university partnerships were the vehicles through which the three reform initiatives were organized (see center box in Figure 1). For the purposes of our conceptual framework each partnership represents a single case. "System" was defined by the entities within the "boundaries" of the school-university partnership, recognizing that there are many other organizations that affect these initiatives (e.g., teacher unions, government policy makers). The intersection of all the component parts is found in the school-university partnership organization. (See Figure 2) Personal and professional relationships provide the connections within an individual school, between schools within a school district, between districts, between schools or districts and the University, and within the cross-site organization.

Within each site there are multiple, embedded or nested cases, a sample of which were examined. The primary focus was the school-university partnership and its intersection with each of the member organizations: the College of Education's teacher education program, school districts, and individual schools. Within these organizations, representatives from the following educator roles were interviewed: school and university faculty and administrators, project staff, supervising teachers, and a sample of preservice students who did their student-teaching in target schools. In Toronto and Southern Maine, the study sample included one high school and

Figure 2. The School-University Partnership



one elementary school in each of two districts. In West Virginia where the total number of schools is much smaller, one high school and one elementary school were selected.

The selection of individual schools was made by mutual agreement between the participating partnerships and the NETWORK, Inc. researchers. The research questions and design of the NETWORK study established parameters defining the major variables under investigation. An effort was made to select schools that participated in preservice preparation, and extensive on-going professional development, while engaged in school-wide improvement efforts. The reformers in each site then selected the individual schools that they felt best met the criteria. As a result, the selected schools probably represent the most exemplary schools rather than the "average" level of school development within the partnerships.

Other influences affecting the reform initiatives, as would be expected, were many and varied depending on the socio-political context within which the school/university partnership is located. They include, among others, teacher unions, government policies, professional networks, and outside funders. Although not the primary focus of the study, where these outside influences were particularly influential their impact was explored (See Figure 2).

The three comprehensive school/university partnership initiatives selected are all seriously rethinking the preparation of education professionals, pre-service students who want to enter the profession, and the on-going learning of practicing educators. The challenge of studying these complex entities is made even more daunting by the fact that the partnership members are attempting to do this while working within dynamic institutions that are engaged in restructuring their own organizations. Accordingly, a strong emphasis was placed on open-ended interviews

to understand the personal and organizational journeys of the participants.

F. Methodology

A comparative case study approach was used in this study. Yin (1989) suggests that case studies are the preferred research strategy when the investigator has little control over events, and when the focus is on contemporary phenomenon within some real-life context — conditions that describe the phenomena under investigation here. A real disadvantage of this approach however, is that real-life is constantly changing. To the researcher the data collection process allows for only periodic snapshots. While a sense of historical development can be gained through retrospective interviews and extant documents, the accuracy of such accounts is dependent on the extent to which informants agree in their accounts. The greater the shared vision, I found, the more likely that various accounts were congruent. When there was significant controversy in the history of the project, it was almost impossible to reach any semblance of consensus.

F.1 Sample Section

After a review of many reform initiatives across the United States and Canada, three sites were selected that met, what many described as, our "too stringent" criteria. A number of criteria were established for selecting sites engaged in systemic reform. The three sites selected all demonstrated:

- comprehensiveness: addressing preparation, on-going learning, and working conditions of educators.
- a focus on the success of all learners.
- a commitment to inquiry, reflection, and research.
- new ways of working that are mainstream activities of their respective organizations.
- mechanisms for communication and dialogue to make sense of where they are and where they are going.
- a willingness to participate with us as research partners.
- a track record, having been established for at least five years.

The three sites selected were The Learning Consortium at the University of Toronto,

The Southern Maine Partnership and the University of Southern Maine Extended Teacher Education Program (ETEP), and The Benedum Project at West Virginia University.

Within the K-12 system on one elementary and one secondary school in each of two districts were selected. (In West Virginia, only one elementary and one secondary school were profiled given the smaller scale of that partnership.)The selection of schools was made by mutual agreement of the site coordinators and the NETWORK researchers. The research questions and design of the NETWORK study established parameters defining the major variables under investigation. An effort was made to select schools that participated in preservice preparation, and extensive on-going professional development, while engaged in school-wide improvement efforts. The site coordinators then selected the individual schools that they felt best met the criteria. As a result, the selected schools, and school districts probably represent the most exemplary schools rather than the "average" level of development within the partnership. Within the university system the investigation included students and faculty within the preservice teacher education program. The intersection of all the component parts is found in the school/university partnership where personal and professional relationships provide the connections within and between organizations.

E.2 Data Collection

Data were collected over an 18-month period through a series of site visits, totaling 15-20 days per site. Most data were collected through semi-structured open-ended interviews covering the principle research questions. These data were supplemented with on-site observations, existing documents, and a collaboratively constructed "journey," (Cox & deFrees, 1991) or historical timeline of each site's development. After many additions and revisions, the final versions of the journeys

completed by each site became the outline from which the research team identified questions to explore to further understand the processes used to facilitate and support change and what it took to bring about the changes that had occurred. In this way the journeys served as an important research tool for guiding the investigation, and as useful story boards for describing these reform initiatives (see Appendix III-A for journeys).

We used a common set of research questions across the sites. The four overarching questions guiding the study were as follows:

1. What has been the nature of the systemic reform effort, including the objectives, structures, roles, and strategies employed?

2. How have research and other knowledge been used in the systemic reform efforts?

3. What have been the prominent outcomes of these partnerships' efforts? In particular, what has been the impact on teacher professionalism, and to what extent have these reforms been institutionalized?

4. What are the important factors that help to explain productive school-university relations?

Data collection followed a sequence of progressive focussing. Interview data were obtained from multiple interviews with key informants in each site. The interview sample "snowballed" as informants identified other key participants. Field notes were transcribed and coded using a coding scheme derived from the principal research questions.

F-3. Data Analysis

The research project had two major components. The first component was a profile of each of the three sites. The second component was the cross-case analysis. The goal of the first portion of the study was to create a narrative record of the evolution of the reform initiative and to analyze the key forces affecting the reform process for each organization within the partnership. From the compilation of

interview data a set of some 25 causal variables common to all three cases emerged that were used to generate causal flow charts (Miles & Huberman, 1994) for the three sites, which could then be compared to isolate "streams" of antecedent and intervening variables leading to the principal outcomes. Causal Networks for the three sites can be found in Appendix I-A, in Volume I. Preliminary findings from all sites were fed back to site informants for verification. The lessons are probably best learned from reading the individual cases, which comprise Volume 2 of this report.

Cross-case analysis began with a review of the three narratives for common or contrasting themes, outcomes, and mediators. This comparison revealed the importance of: 1) personal and professional relationships as the foundation for these partnerships; 2) access to a variety of professional development opportunities; 3) stability of leadership; 4) resource availability; 5) goal congruence among organizations and the alignment of organization arrangements to achieve goals; and 6) the inherent tensions endemic to school-university partnerships. The cross-case analysis in presented in Volume I.

The analysis then turned to an assessment of outcomes based on five different dimensions of professionalism and the extent to which these reforms have been institutionalized.

It is important to remember that the total amount of time spent at each site was short (15-20 days), particularly when studying a number of different organizations within each partnership. Consequently the view presented here represents a snapshot of continually evolving reform efforts. Furthermore, with only three cases, general conclusions must be considered tentative.

Notes

[1]The Professional Development School (PDS) model has become the dominant model in this movement. Darling-Hammond (1994) notes that PDSs are a special case of school restructuring as they simultaneously restructure school and teacher education programs, they redefine teaching and learning for all members of the profession and the school community. PDS arrangements are growing across the country and much has been learned about the challenge of restructuring two institutions at the same time, including the collaborative demands PDSs place on individual and institutional participants, the threats that these reforms pose to the norms and traditions of both institutions, the low status that teacher education holds within universities, the poor reputation of staff development in schools, and the lack of institutional incentives for undertaking this kind of work (Darling-Hammond, 1994).

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Appendix III-A. Journeys

The Journey

Introduction: An oral history is an excellent way to capture a valuable perspective about the past. Often, important information is lost because it is not officially recorded. In a school system, for instance, the only records may be notes of meetings sanitized for the official record. The Journey is a way for teams to record events of the past in a visual or graphic way. In addition to being a creative way to track past activities and events, it is a valuable planning tool, especially for anyone who wants to avoid "reinventing the wheel."

Purpose: A journey can be developed for several purposes, among them to:

- identify key events, milestones, factors, and influences that have been important over time;
- develop a shared sense of history among a group of people;
- honor how far a person, group, or organization has come and serve as a basis for celebration;
- orient new staff among their colleagues;
- foster an awareness of developments over time in newcomers and outsiders;
- activate prior knowledge and experience in order to begin making connections to new work and next steps—to set current activities into context;
- allow a person, group, or organization to explain to others what has happened;
- use a more "right-brained" approach to complement the "left-brained" production of text; and
- document and reflect on change, development, and learning.

Both the process and the product of journey development foster reflection.

Materials: Enough copies of the Narragansett Elementary School journey (see page 27) for each participant, newsprint, easels, markers, masking tape, clear tape, Post-Its, and pens or pencils.

Source: Work in Progress: Restructuring in Ten Maine Schools by Pat L. Cox and Jane deFrees. The Regional Laboratory for Educational Improvement of the Northeast and Islands and the Maine Department of Education. ©1991.

Leader's Notes: A "journey" is a drawing, map, or other representation that answers the question, How have you gotten where you are today? The focus of the journey may be at any level—community, organization, or individual. Every journey has a framing question: it may be about the development of a program, the changes in a school, the work that has been undertaken to become a learner- and learning-centered district, etc. For an individual, an example of a framing question might be, How have you developed as a teacher using authentic assessment?

The journey technique is loosely based on "casual mapping" methodology developed by qualitative researchers to depict and explain the relationships among key variables in a study (Miles and Huberman 1984).

Use the following questions to guide the participants through a journey:

Process/Steps:

1. **What is your purpose?** Decide the purpose(s) you have for the journey and how developing the journey fits into ongoing work. For example, if you want to learn about a particular program, do you want to focus on the program's journey, or how the program fits into the overall journey of your organization? For example, in telling the story of the Maine State Restructuring Program participants focused on the journeys of ten schools over time where the restructuring effort fit into the development of the schools (see the journey from the Narragansett Elementary School in Maine on pages 27-29). When staff from schools in Vermont reviewed the journeys, they said that it was the first time they felt that schools had been honored for their own history rather than being viewed piecemeal through program-centered documentation.

   Think ahead about what should happen with the journeys—that is, is this a "one-shot deal" just to try it out? Do you foresee needing to reproduce it in some way? Do you want to disseminate it in some way, e.g., hang it up, etc.? We have found that people are often initially reluctant to engage in a "drawing" activity but later discover that what they have created is special and that they want to do further work on it.

2. **Who creates the journey?** Journeys have been developed by individuals, pairs, small and large teams, and whole organizations. In developing journeys with others, participants find that no one person has all the information about what has happened over time. Having newcomers helps those who have been around for a while "tell the story" that many may take for granted.

3. **How do people create journeys?** People can create journeys on any size sheet of paper, but if a group is doing the work and the journey is to be displayed, working on one or more sheets of newsprint is helpful. To help people overcome the tyranny of a blank sheet of paper, we have found that using different sized Post-Its helps them write down important events, influences, etc., while still enabling them to rearrange the pattern and flow as new ideas come to mind. Post-Its also allow several people to contribute at the same time. Remember to tape the Post-Its down with clear tape when you're done so they don't flutter away when displayed or moved.

WHAT'S BEEN HAPPENING AT NARRAGANSETT ELEMENTARY SCHOOL (continued)

3. WHAT'S DIFFERENT ABOUT THE ORGANIZATION AND OPERATION OF THE SCHOOL?

The school is organized to provide:

- team leader positions for teachers
- time for teachers to work with and observe colleagues and children at all grade levels
- professional development for all faculty, through which staff learnings have led to a "common language" in which to discuss education
- services to students in the classroom rather than in separate programs, e.g., students with disabilities are mainstreamed
- paraprofessional help in every classroom
- clerical assistance to dignify student work through "publishing" and other preparation of materials and to allow teachers more time to listen to children
- the opportunity for the principal to make facilitation of change an ongoing part of her role
- the position of teacher-scholar, which funds one staff member fulltime for a year to engage in intensive study and to assist colleagues in gathering information, developing and sharing research

4. WHAT CONNECTIONS ARE BEING BUILT?

Within the school district:

- working with the computer coordinator at the junior high to develop multi-media assessment portfolio
- strong support from superintendent
- the high school is involved in its own restructuring project
- the other primary school in the district is creating its own restructuring vision

With parents and community:

- parents work with teachers to place students in the appropriate learning settings
- parent volunteers are active in the school
- community television network features weekly reports from principals and scenes at the schools

With assistance resources:

- membership in Southern Maine Partnership with the University of Southern Maine "taught us to think and not to be complacent"
- networking with other schools engaged in restructuring

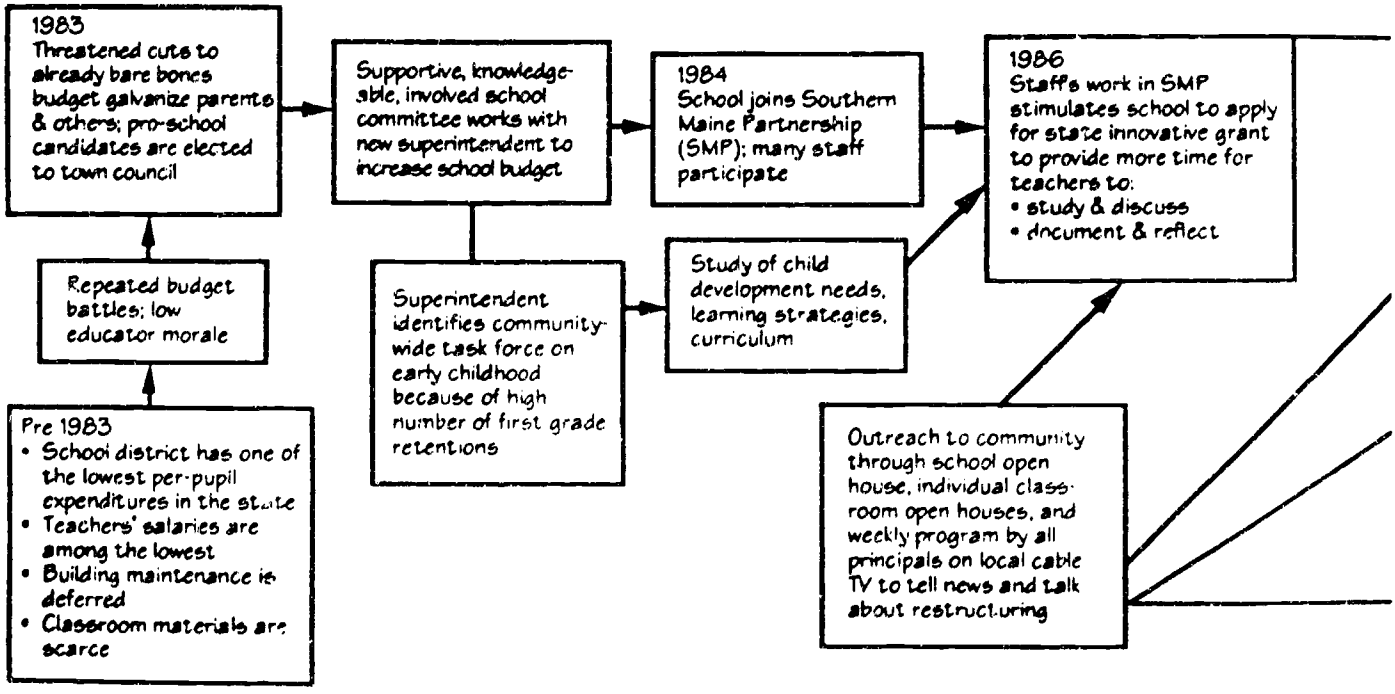
5. WHAT QUESTIONS ARE BEING ASKED?

- How does a restructuring school link with other schools in the same district?
- How does one share a changing school culture to keep the restructuring going?
- How does one find the funding from the local school budget to continue the initiatives?
- Looking into metacognition: how do kids perceive themselves and their learnings and what strategies do we give them about how they think?
- How do we know what is important to teach and how do we assess that?

NARRAGANSETT ELEMENTARY SCHOOL: *"Becoming a center of inquiry"*

Narragansett Elementary School is located in Gorham, on the outskirts of Portland, Maine's largest city. It is one of six schools in a K–12 school district serving about 2000 students. The population in Gorham is growing rapidly. Until 1990, Narragansett had 580 students enrolled in grades K–3. The formation of a Kindergarten Center in another building in 1990 reduced the number of students at the school to 430, grades 1–3. Narragansett is one of two schools in the district receiving state restructuring grant funds, the other being Gorham High School. The school district has a long history of school improvement efforts. Gorham is also the location of the University of Southern Maine (USM), which has a strong education program. Narragansett has found the USM-sponsored Southern Maine Partnership, a network of schools engaged in questioning their practices, to be an invaluable vehicle for inquiry and exchange of ideas. In the same spirit that businesses fund R&D to keep their organizations at the cutting edge, Narragansett has used some of its restructuring grant to fund a position devoted to connecting the staff with research: "If we're going to be a center of inquiry, we have to go, think, do, and have access to information — and that takes money." At the same time, the Narragansett staff is acting on the realization that, to continue change over the long haul means that there must be a "community of leaders," with leaders coming forward as needed and then moving back to let others lead: "Nothing meaningful happens if only one person carries it."

NARRAGANSETT ELEMENTARY SCHOOL'S JOURNEY



WHAT'S BEEN HAPPENING AT NARRAGANSETT ELEMENTARY SCHOOL

1. WHAT'S DIFFERENT FOR STUDENTS?

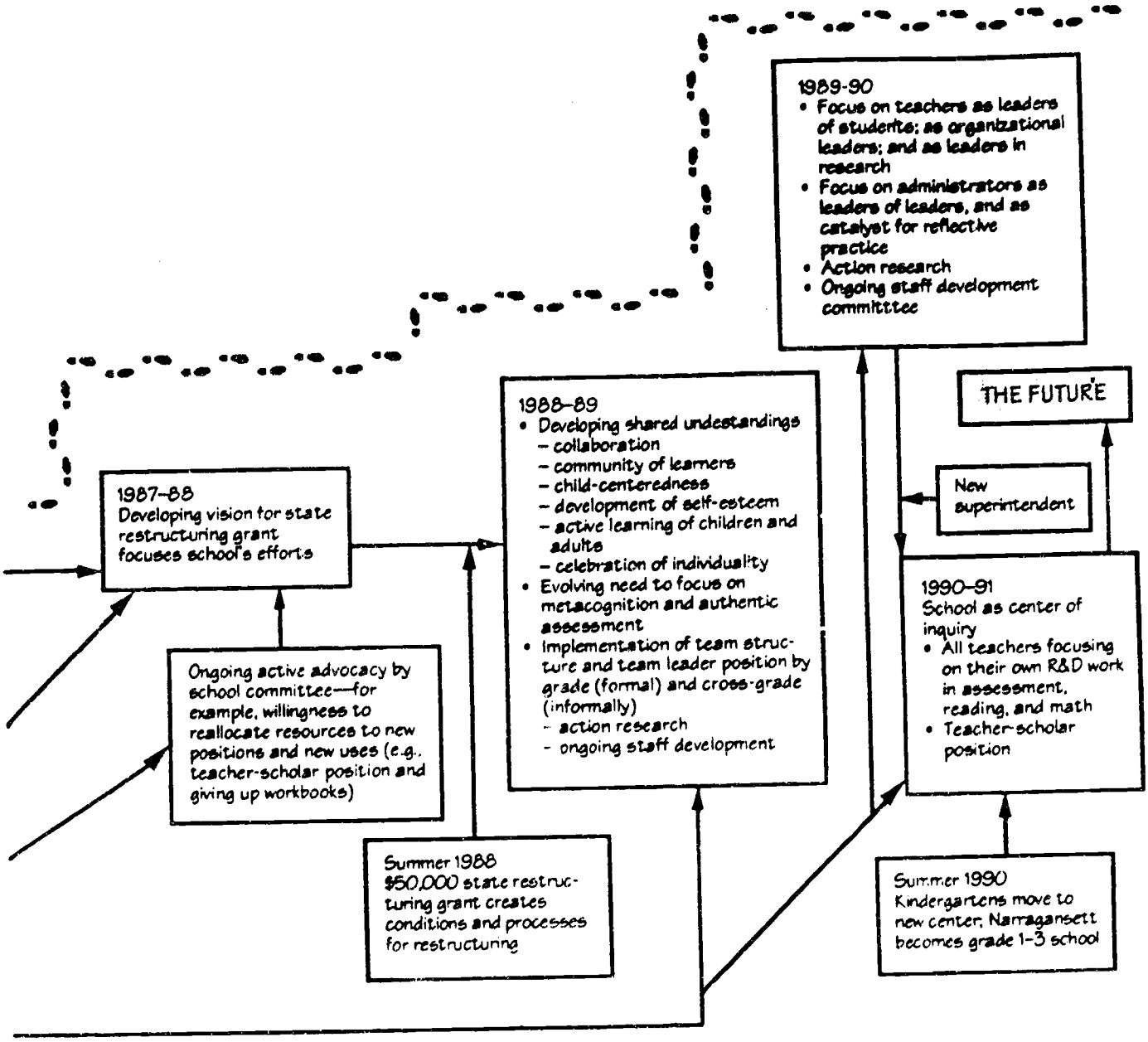
All kids:

- have an opportunity for success as active learners
- learn in variety of ways with a variety of materials
- are appreciated for their developmental stages and differences

All kids (continued):

- feel safe and successful in school
- see inquiry being respected and modeled
- have choices and involvement in the learning process
- are empowered with skills and treated with dignity
- are taught to think about, talk about, and assess their own learning process

Source: Cox and deFrees, op cit., 21: 8-10



2. WHAT'S DIFFERENT ABOUT TEACHING AND LEARNING?

Teachers:

- are reflective practitioners modeling inquiry
- have as a key question "how is this child smart?"
- trust one another so all can succeed in his/her own style of teaching
- have the opportunity to try new programs and practices
- engage in cross-grade-level teaching
- team both within and across grade levels

Teachers (continued):

- have the opportunity to stay with same students for two years
- develop curriculum using children's prior knowledge and curiosity
- have the opportunity to study and to conduct research projects
- use more child-centered assessment approaches
- are working with a district technology specialist to develop a cumulative portfolio assessment system K–12 that uses multiple media (video, document scanners, audio recorders) to record student progress

One of the trade-offs of using newsprint, which is usually about 2' x 3' rather than 8-1/2" x 11" or 11" x 14", is that reproducing the journey for distribution becomes a hassle. The choices are transcription, copying the journey onto smaller pieces of paper, or using a blueprint copier, which is currently available at many copying outlets. We found one machine that would create an 11" x 14" copy from a couple of newsprint sheets!

Journeys can also be created through interviews, in which a person not involved in the effort of focus asks one or more participants to tell the story. The rough draft created by the interviewer can then be revised and/or elaborated by the interviewees. A rough draft journey can also be created from a review of documents.

4. **What questions should be asked to shape the journey?** First, set the stage for the activity: Determine the framing question for the journey. Given the frame, acknowledge that individuals (or teams, organizations, programs, state) have been around for a while and that many things have happened over time. Even if individuals are new, there have been many activities, decisions, and events that have occurred.

   Invite participants to begin their journeys, asking them to consider some or all of the following questions: When did the journey begin? What are the key events or milestones that have brought us to where we are now? Remember to include the good, the bad, and the ugly. What obstacles have we overcome? What support have we had? What influences, positive and negative, have there been? What have been accomplishments and setbacks? You can use symbols to demarcate different aspects of the journey, for example:

   ▲ = Changes, ○ = Processes, and □ = Events.

   Encourage the journey developers to note where they lack information or have questions to ask others. The journey may be a work-in-progress that people may want to update occasionally. When a team develops a journey away from the rest of the school or the organization, members often want to return home and make an opportunity for colleagues to create a whole-organization journey, rather than bring home a product created by a few individuals.

5. **What questions should be asked to reflect on during the journey?** We have used a variety of "lenses" or questions to reflect on during journeys. Here are a few options:

   - First, look over the journey and recognize how much you have accomplished and handled over time. People who are in the thick of things and focused on how much there is yet to do rarely give themselves or one another credit for all the hard work.

   - Stand back and ask yourselves if there have been major areas or stages that the journey divides itself into. For example, staff from one city school district realized that their journey of 25 years could be divided into three areas: 1) when the district was highly reactive (not to mention defensive), 2) when the district set about becoming proactive and self-determining, and 3) when the self-determination that had resulted in high centralization was being spread throughout the district.

- Look at the journey and ask, What have we learned as a result of all this? What does that mean for our future?

- Review the journey by asking these questions: What's different for clients (students and others) as a result of all this? What's different for staff? What's different about the structure and operation of the organization? What connections have been made—with the community and other organizations? What questions are we asking now?

- You can also use one of a number of conceptual frameworks to reflect on or analyze your journey. For example, the CaMaPe framework of models of school organization may be appropriate or the CBAM change frameworks (see bibliography).

Time Required: It depends on the purpose and how many are involved. An individual reflecting on an experience can create a journey in 20 minutes. For a team or larger group to develop a journey requires time for the group to orient themselves to the task, then to talk as they build the journey, and finally to reflect on its meaning. In addition, when a number of individuals or teams are working on different journeys, people want to share their journeys and insights from creating them. Small teams can complete a rough journey in 45 minutes, but that leaves little or no time for reflection.

We recommend one hour for journey creation and one half hour for reflection, followed by sharing-out time as appropriate.