



StrateNotes

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Calendar

Jan. 23-24, 2004

West Regional Update
Las Vegas, Nevada,
Barbara Millikan,
Barbara_Millikan@
beavton.k12.or.us or
Susan Miller,
millersp@unlv.edu

Jan. 28-30, 2004

Florida Update, St.
Augustine, Margie
Ringler, projcentral@
mail.ucf.edu

March 4-6, 2004

Southeast Regional
Update, Charleston,
South Carolina
Jerri Neduchal,
neduchj@ocps.k12.fl.us

March 17-19, 2004

St. John Island Update,
Maho Bay, Virgin Islands
Ed Pieper, piepere@
hotmail.com, or Vicki
Cotsworth,
cotswoldfarm@
hotmail.com

April 16-17, 2004

Midwest Region in Iowa
Update, Sioux City,
Jeanne Lichty,
jlichty@aea12.k12.ia.us

June 1-5, 2004

Teaching Content to All:
Effective College
Teaching
Lawrence, Kansas

More calendar on page 2.

Educational Change

Fullan discusses professional development

Michael Fullan is widely recognized as one of the world's leading thinkers in the study of educational change. His book, *The New Meaning of Educational Change*, has been required reading for SIM Professional Developers for more than a decade, and his *Change Forces Trilogy* has significantly influenced the direction of CRL's *Pathways to Success* project.

In May 2003, Michael sat down with CRL's Jim Knight to discuss a wide range of issues related to professional development. The following are excerpts from their conversation.

Scaling Up

Jim: If you were handed as much money as you wanted to do research, what would be the question you would be trying to find the answer to?

Michael: I'd have to sort of back into that, because I never start with the research questions anymore. I mean, all our stuff is intervention work, development, and training, and we draw on the research and form the design. My mentality is design, design, design. If life-scale change, how do we design that? I'm interested in accomplishing large-scale implementation. I'm not so much interested in what's the intriguing research question out there.

My research questions, a lot of them are imbedded in *Change Forces With A Vengeance*, because that's the core of the work. They are questions like, "How do you get changes—where we know the knowledge such as literacy and numeracy—into place, in a way so that there's a push on leadership, on service, on that side of things? How do you move as quickly as possible and gain on that teacher and principal commitment and capacity ...

Part of our analysis is really sequential now. If you want large-scale change and there is a serious problem and you have good knowledge to start with, start with prescription. Immediately as you're doing that, figure out ways of not being so prescriptive, of creating

relevant collaborations, networks, leadership training, and that type of thing.

To me, the most interesting research question is, "What are the high-yield strategies that get quality implementation and teacher commitment and principal commitment?" That's the kind of core research question.

How do you facilitate the greatest amount of ownership, let's say, over a period of time, where you're starting with low ownership? You're looking for the most efficient, effective strategies that will get at that.

Amanda Datnow is a policy researcher, and she's been working with Sam Stringfield. They've studied these whole-school reform models like Success for All and so forth. Basically what they find—first, the 90 percent buy-in is not very telling because in many cases, people will vote, and they don't know what they're voting for. It's subtle. Everybody goes along. It's kind of "group think" sometimes. The principal is in favor of it, so they go along with it. Their research shows pretty clearly that these models, even when you have the buy-in, some of them get implemented. They have a short shelf life—mostly three to five years, and then they disappear. That's the history of it.

So they [New American Schools] are in the midst of changing their strategy to move away from whole-school reform endorsement to endorsing the basic concepts of professional learning community culture and leadership. I'm doing a paper for them, which is called "Whole-

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More Calendar

June 16-19, 2004

Strategic Instruction Model (SIM)
Institute: Level I
Lawrence, Kansas

June 16-19, 2004

Strategic Instruction Model (SIM)
Institute: Level II
Lawrence, Kansas

June 21-25, 2004

Strategic Instruction Model (SIM)
Institute: Writing Strategies
Lawrence, Kansas

June 28-July 1, 2004

Strategic Instruction Model Institute:
Content Enhancement
Lawrence, Kansas

July 19-20, 2004

Preconference Seminars
Lawrence, Kansas

July 21-23, 2004

International SIM Conference
Lawrence, Kansas

July 26-30, 2004

Potential SIM Professional Developers
Institutes for Learning Strategies and
Content Enhancement
Lawrence, Kansas

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System, Not Whole-School Reform.” Not because I’m against whole-school reform, but if you come in with an external model, even if it’s a good one like Success for All is, you kind of make it easy for people not to think conceptually about what they’re doing because that’s all laid out for them. It’s prescribed, so they take that on. There is a real externality to it. Plus, it doesn’t last because it’s usually associated with leaders who brought in something.

What we’ve been trying to do is say, well, this is also dissemination. If you look at some of the key concepts that we’ve been working on—professional learning communities, assessment literacy, ongoing monitoring, intense profession development—you get many districts that will take those on. They take on the surface policy labels but not the underlying thinking. So the key for us—the key breakthrough—is how to get the underlying thinking as part of the deliberations going and looking for high-yield ways of getting that.

When you’ve got a local leader who is really doing the conceptual work, really being a critical consumer of this research, and then they want to interact with you to go more, it works like a charm.

If you go to another place where the leaders say, “Wow! This is great stuff. Tell us more about it,” but they’re not doing their share of thinking—they’re looking for the answer—it never works. It’s the same intervention. That is, we give the same advice and the same training to both of those situations, so the difference is not the intervention; the difference is the proactive leadership of the receiving end, so to speak.

Jim: I have a council at the district level where I meet with the head of assessments, the assistant superintendent, a couple of the curriculum coordinators—essentially all of the people

except the superintendent. How would you—what advice would you give me on how to work with that group?

Michael: I want them to be strategizing and thinking of using you and your Center to implement things that should be implemented. I don’t want you to have to show up there to explain—you’ll do some of that—but the main point is not to keep telling them things and having them ask questions, but to have them be proactive strategizers, where they say, “This work that you’re doing is right on for us. We want to do it well, and we’re committed to that.” They start strategizing how

to do this.

I would want them to be familiar with what I call the practical literature on how does change occur. That doesn’t mean they should become experts on it and study volumes, but they start professional learning communities and become second nature for them to think, “Oh yeah, that’s what we’re creating.” They pick an article, and it has leadership in a professional learning community, and they say that article is out to lunch. They can recognize a good example from a bad example and really start to permeate the culture of that district with this kind of thinking and development.

Jim: You’ve mentioned professional learning culture and some other broad themes. What would you say are the key themes, and then what would be some foundational articles or works that would support those key themes?

Michael: A professional learning community at the school level would be one. A second key theme is district-wide reform. We used case studies of what a district does when it focuses on instruction. The third key theme is assessment literacy, which is getting people into the habit of looking at student work and curriculum and disaggregating the data.

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Another one is leadership. One of my sayings now is, “Leadership is to this decade what standards was to the 1990s if you want large-scale, sustainable reform.” So this is leadership at many levels. This leads to things like the main mark of an effective leader is not

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his or her impact on the bottom line of student achievement during their tenure of leadership, but how many good leaders they leave behind.

[In reference to his current thinking on professional development:] There are five pieces. One is the messiness of change, which is a core piece. Then there are four solutions that surround that. Those four solutions are professional learning community at the school level, district-wide reform, policy (because we’re working on influencing the policy context more and more), and leadership.

The people that receive training for us, they go deeply into understanding change, the do’s and don’ts of change, the messiness of the change process, some of the ideas, and then they say, “Given this messiness, how do we move ahead and create greater coherence, cooperation, commitment, energy, and that?” And we build professional learning communities. We work on district-wide reform. We pay attention to the policy. It depends on where you are, but basically we’re saying the infrastructure is key here. We say that there is a lot of research that will show individual schools doing well, even those that are facing poor circumstances, so we know the characteristics of that. The problem with that research is that it treats these schools as if they were silos. It doesn’t say, well, were they in a district where all schools in the district were doing

it? Did they get that good because they were robbing the best teachers from other schools and thereby weakening the system? We say the only way to get substantial change is that you start affecting the infrastructure. That means you start affecting district culture. You start affecting policy context.

That booklet [*Leading in a Culture of Change*] is what the participants get. There is an article in there from Richard Stiggins where he talks about assessment for learning versus assessment of learning and how to reconcile classroom assessment and high-stakes testing.

So we get people looking at these articles. We do jigsaws on them or whatever they pull out, and they have a group discussion—why does a teacher have to be more assessment literate? What does it look like? If you take *Change Forces with a Vengeance* and the *Moral Leadership*, and you look up the references in each of those, that is the bibliography.

...

Michael: Another key thing on the research side is the role of context, culture...

The traditional way of doing it in the research sense is [to say in an article that] you have the same intervention going into two different places. The context differed, and that’s why the intervention worked in one place, and it didn’t work in another. That’s true enough, but what I’m saying more and more is that context is the thing that you need to change.

You need to change the context, not treat it as a given. It’s basically systems thinking. It says if you really want to make some basic changes, you’ve got to get at those interventions that don’t just change the teaching learning part, but you’re really trying to change the systems thinking that surrounds that—that kind

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of support and so forth that you’ve built into it. This is a new kind of way of thinking about it.

Change Agents

Jim: What can that instructional collaborator, that full-time professional developer in a school, what can she or he do to make those kinds of contextual changes?

Michael: There are two things. One is that the instructional collaborator is a change agent, so the more he or she knows about these factors, the more they don’t get frustrated. They take things into account. So, you want to beef up their change agent expertise and wisdom. There is that part of it. In that case, that individual doesn’t change state policy, but they’re more likely to deal with it constructively than destructively and as part of the equation...because they understand change, and they’re looking at how it can be used—the ins and outs of it. In all of the cases that we’re looking at, we’re also working with those that have a chance to affect some wider part of the infrastructure. This is why I don’t work with anything smaller than a district now, even though we work intensively in schools. I think if the district is not in the game, then I’m not going to be working there because the district has to be working on this issue. We now have a great increase in district-level leadership who want to work on these things.

If we take York region where we’re doing the 40 schools plus 80 schools or the Toronto district, the 93 schools, each of those schools have one or two change agents [including the principal of each].

You draw the conclusion that you need the leadership of the school to be leading the change process. That’s what it’s based on. We’re building up their expertise. In the meantime we’re trying to influence and work directly with the infrastructure, which is the district superintendent and other superintendents and facilitators at the district level. So we’re changing, if you like, the district context. We can’t change the state context in that model. We can in England because all levels are involved,

PD News

SIM Professional Developer **Jean Mooney**, professor emeritus at Boston College, received the Pioneer Award during the Massachusetts CEC conference in November.

The Slidell Sentry News in Slidell, Louisiana, featured SIM in an October article. The article described the St. Tammany Parish School Board's support for SIM and quoted a high school student who credits SIM with improving her vocabulary memorization by 46 percent. "I am proof that it works," the student told the school board.

2004 conference

The 2004 International SIM Conference will be July 21-23, 2004, at SpringHill Suites in Lawrence, Kansas. Preconference seminars will be July 19-20. Look for more information in future issues of *Stratenotes*.

but not here yet. At least we're doing those two things. Right away I would put—for your individual change agents, I would say if they're not part of a strategy where the district is exquisitely aware that they're strategizing, too, in the same direction and interacting with these change agents in a way that really pulls it together, then it's not going to have much of an impact.

I think the main thing I want to say is that what you don't want is their saying that "this is Jim Knight's project, and we're happy to participate in 'his' project." You want them to be familiar with the kind of concepts we're talking about today—professional learning communities, district-wide reform, school-based professional learning community among teachers, assessment literacy. You want them to be constantly thinking about how

they're moving the district and the schools forward, and how your project helps them do that. It's feeding them some articles on the kinds of concepts that you're dealing with.

Jim: Let's say you were invited to [a district or state that is just starting a change process]. You realize this group doesn't have much, let's call it "change agent literacy" or something. They're stuck in a really reactive mode, and they want a silver bullet. Yet they have resources, and they're not completely opposed to listening. How would you approach that group?

Michael: I would basically convince them that this is a line of thinking that they should pay attention to and work on. If I'm working with them over time like we are in some of the districts—the York

region, for example ... We had a focus on program coherence. The team was the principal, the literacy coordinator, and the special needs—a threesome from each of the 40 schools. The homework was to go back to the school in the next six weeks before the next session and see ways in which they could achieve greater program coherence within their school. We gave them really smart, good input on that.

When we come back next time, early in the first morning, we will process that. They'll provide examples to us and to each other about strides they've made, about how they've gone about program coherence. Laterally across the schools, they'll start learning from each other, saying, "Oh yeah. That's great. I never thought about this." Or, "I'm proud that we did it this way." Sure enough, people are finally seeing how it comes together.

Jim: From my perspective, you're talking about change using what I'm calling this *Partnership Learning* approach. It's all focused on praxis. It's engaging because they're solving real problems. They're thinking together, ideally. You have a real, true dialogue that takes place, at least a discussion taking place.

Michael: That's right. They've joined the partnership because they want us to help them implement literacy.

Books by Michael Fullan:

Leading in a Culture of Change, published by Jossey-Bass (2001)

Change Forces With A Vengeance, published by RoutledgeFalmer (2002)

The Moral Imperative of School Leadership, published by Corwin Press (2003).

You draw the conclusion that you need the leadership of the school to be leading the change process. In the meantime, we're trying to influence and work directly with the infrastructure, which is the district superintendent and other superintendents and facilitators at the district level. So we're changing, if you like, the district context.

SIM family welcomes new potential PDs

CRL and the SIM Professional Development Network welcome the following individuals who attended potential PD institutes in 2003. The list includes the name of the SIM Professional Developers who conducted the institutes. Information in parenthesis indicates whether the institute focused on Content Enhancement (CE) or Learning Strategies (LS).

Arkansas Institute (CE)

SIM Leaders: Don Deshler & Keith Lenz

Arkansas: Dan Barrington, Lori Brainerd-Yancey, Mark Cooper, Lisa George, Brian Ratliff, Joyce Sullivan

Minnesota: Amy Mahlke

New York: Dotti Turner

Maryland Institute (LS)

SIM Leader: Rosemary Tralli

Louisiana: Suzanne Nerren, Shari Norberg

Maryland: MaryAnn Marvil, Carroll Sager, Norman Shuman, Dianne Tracey

Maryland Institute (CE)

SIM Leader: Rosemary Tralli

Maryland: Charlotte Baker

Virginia: Lynn Graves, Lisa Holland, Kathleen Shelor, Ben Tickle

Minnesota Institute (LS)

SIM Leaders: Rosemary Tralli & Shari Schindele

California: Laurel Hill-Ward

Kansas: Cristan Philipp

Minnesota: Marsha Gullickson, Mary Kirchhof, Brenda Meyer

Nevada: Susan D'Aniello, Jennifer Stringfellow

Missouri Institute (LS)

SIM Leader: Mary Ellen O'Hare & Bev Colombo

Missouri: Matt Bailey, Andrea

D'Angelo, David Day, Donna Schultz, Vickie Svaglic

Ohio: Leslie Leonard

Ohio Institute (LS)

SIM Leaders: Ann Hoffman & Conn Thomas

Ohio: Cynthia Keenan, Tracy Mail, Monica Milosovic, Vicki Owens, Teresa Sopko

Pennsylvania Institute (LS)

SIM Leaders: Charlie Hughes, Rosemary Tralli, & Ann Hoffman

Pennsylvania: Judy Ball, Gail Campbell, Joy Eichelberger, Wendy Farone, Marian Fisher, Ron Miros, Arlene (Pat) Rubincan, Marlene Schechter-Connors, Jonathan Stout

Texas Institute (LS)

SIM Leader: Conn Thomas

New Mexico: Ruby Lynch-Arroyo, Odessa Wood

Texas: Edi Brannon, Jay Dea Brownfield, Desiree Espinoza, Beth Longenbaugh, Mary Lou Parker, Victoria Ricketts, Pam Stephens

Virginia Institute (CE)

SIM Leaders: Rosemary Tralli & Helen Barrier

Virginia: Tammi Flanagan, Susan Hill, Jessica Nuzum, Jennifer Wile

West Virginia: P. Matthew Henry

E-SIM

SIMTRAINER-L

An e-mail discussion list for SIM Professional Developers. To subscribe, send an e-mail message to

listproc@ku.edu

In the body of the message, type

sub SIMTRAINER-L Your Name

Replace "Your Name" with your name. SIMTRAINER-L is all one word; do not type any spaces in the list name. Do not type anything in the subject line of the message.

SIMville

A password-protected section of the KU-CRL web site just for SIM Professional Developers. From the Center's Institute for Effective Instruction web site,

www.kucrl.org/iei

click on "SIM Professional Developers" under the Popular Picks heading. When you select the log on option, you will be asked for a password. Type "**strategic**" in the box (do not type the quotation marks). The password is case-sensitive, so you must use all lowercase letters. Click on the "OK" button.

kucrl.org

CRL's web site is in the midst of extensive reorganization and revision. The Home page has been redesigned to be more representative of all four CRL institutes, divisions, and labs. The page now includes prominent links to ALTEC, the eLearning Design Lab, the Division of Adult Studies, and the Institute for Effective Instruction (home of SIM information). Other features of interest:

- Highlights from the 2003 conference, **kucrl.org/25thanniversary**
- CRL History Project, **kucrl.org/history**

CRL update: e-Learning Design Lab

One of the projects recently completed by the e-Learning Design Lab was the Online Delivery Model Project funded by the Office of Special Education Programs in follow up to the Online Academy. The purpose of the project was to engage teams of educators from nine states—Kansas, Michigan, Montana, New Jersey, Oklahoma, Utah, Idaho, Alabama, and North Carolina—in the development of models for implementing online staff development at the state, regional, and national levels.

Five online staff development modules were beta tested by members of the state teams as a strategy for ensuring that all participants in the planning process possessed a common understanding of online staff development.

The project was organized around two

two-day planning retreats supplemented by a series of planning tasks. In addition, two studies were conducted as a way to inform the planning process: (a) a study of barriers to online staff development and (b) a study of the conditions or parameters of online staff development.

Three overriding conclusions resulted:

1. Any large-scale online staff development initiative must be a collaborative effort involving agencies such as state departments of education, institutions of higher education, local education agencies, and other agencies with shared missions where these exist.
2. The probabilities of success increase significantly if a single agency is designated to assume primary leadership for the effort.

3. Implementation planning must be an informed process with attention devoted to ensuring that decision makers have access to information on the conditions that are essential to effective online instruction and the barriers that can be anticipated in the process of implementation.

The final report details information about implementation regarding elements of planning, assumptions underlying the recommendations for implementation, attributes common to potential lead agencies, and attributes of selected lead agencies along with organizational considerations.

Research reports on these studies along with the final report on the project are available on the e-Learning Design Lab web site at <http://elearndesign.org>.

FIRST CLASS

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