Vision to Action

A Resource for Educational Change

Renewing Education:
New Directions

Manitoba
Education
and Training
Linda G. McIntosh,
Minister

VISION TO ACTION

A Resource for
Educational Change

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Foreword

In 1994, the Province of Manitoba embarked on *Renewing Education: New Directions*, an ambitious initiative of educational renewal of schools and schooling. While many Manitoba educators were already in the forefront of educational innovation, *Renewing Education: New Directions* was intended to be a catalyst for change on a larger scale. Its impact has permeated the context in which the province's educators, parents,* and students live and work.

Central to the educational renewal philosophy are the twin elements of a strong provincial framework for education and the empowerment of schools and communities to make local decisions about how best to meet students' and teachers' specific learning requirements. Areas that involve ongoing local responsibility include

- implementing new curricula and educational policies
- providing teachers with relevant and meaningful professional development
- enriching classroom teaching and assessment practices through approaches such as differentiating instruction, integrating Aboriginal perspectives, expanding resource-based learning, and using diverse authentic assessment tools
- developing and implementing annual school plans, which include policies and plans for action on a variety of educational topics
- designing and implementing locally developed/acquired curricula
- supporting the learning requirements of students, including at-risk and struggling learners and gifted and highly able students, which may involve the adaptation, modification, acceleration, or enrichment of curricula, as well as flexible timetabling, scheduling, and staffing
- working with parents, students, and community members in a variety of forums, including Advisory Councils for School Leadership
- developing and implementing policies and practices for assessing and reporting on student progress and achievement
- making local choices and exercising options with respect to program offerings and requirements
- integrating technology and distance education into the school

* In this document, the term *parents* refers to both parents and guardians and is used with the recognition that in some cases only one parent may be involved in a child's education.

Any one of these areas of responsibility offers both challenges and opportunities for educators throughout the province. Together, the list represents a formidable agenda, and, even then, it does not encompass all the possibilities for change that face us. How can we prepare ourselves to meet this scale of change? More importantly, how can we strengthen our capacity, within our many educational institutions and organizations, to implement and manage change constructively?

One point is certain: managing change constructively involves collaboration among teachers, administrators, parents, students, and members of local communities. It also involves learning new ways of living, working, and teaching, and that takes time.

Sometimes the pace of educational change seems overwhelming. The number and scope of responsibilities can be daunting unless we limit our immediate focus to manageable areas for action. This is where *Vision to Action: A Resource for Educational Change* can make a contribution. This resource responds to educators' needs for a supportive process and tools to deal with changes in areas such as policy and curriculum implementation, as well as the implementation of local initiatives. Its intent is to empower individuals and groups to make the change process more manageable.

Vision to Action is more than a print resource. It is an overall approach to educational change that begins with the concerns of the people involved. The print resource provides flexible yet systematically organized tools for designing, implementing, and tracking learning projects focused on a goal or question selected by the participants themselves. The process may be used by all partners in the educational system, either individually or in collaborative teams. It is applicable in a wide variety of settings and for a wide variety of purposes.

Manitoba schools and communities are filled with dedicated educators, and there are already many examples of excellent educational projects under way. Teachers are committed to providing the best possible education for their students, even under the most challenging conditions. This resource is intended to support those efforts.

SUPPORTING CHANGE

Many schools have created school- and/or division/district-based implementation teams to plan the implementation of new policies and curricula, and to organize and lead ongoing staff development and support activities within the school and/or school division/district. These teams can also help to inform the local community about the change taking place in schools as new policies and curricula are implemented.

Ideally, school- and/or division/district-based implementation teams include teachers, administrators, other school staff, parents or guardians, students, and members of the local community. It is critical that these teams have administrative support and leadership at both the school and divisional/district levels. Some divisions/districts have established implementation committees to help coordinate the work of the team.

Manitoba Education and Training supports the school-based implementation team concept and is committed to working with all educational partners to promote and support them.

Support to schools and school divisions/districts relating to the information in this resource is available by contacting

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Introduction

Purposes of This Resource

What is the *Vision to Action* approach?

Educational change involves learning—for educators, parents, and students. Learning is especially challenging during times of change because extra effort and risk taking are required to investigate new approaches in an uncertain climate. The *Vision to Action* approach suggests that learning can be more effective if we focus our efforts on one or two areas at a time, to make the change process less overwhelming. A learning project is one way to plan for a change that is specific, manageable, and worthwhile.

How do I use the *Vision to Action* approach?

This resource outlines a process and tools for engaging in worthwhile, manageable learning projects that address important areas of educational change. It invites educators to design their own learning projects, either individually or collaboratively, that address their most pressing concerns and match their specific situations and learning styles.

How will *Vision to Action* help me deal with educational change?

Thoughtful educators challenge and develop themselves through investigating new ideas, exploring alternatives in their work with students, parents, or colleagues, and discussing and evaluating their experiences. A learning project provides an opportunity to focus on one aspect of professional growth related to curriculum, instruction, or assessment, and to develop or improve educational practices in that area consciously and deliberately.

What benefits will I gain from this approach?

The process of designing, implementing, and evaluating a project will not only extend understanding and skills in one focus area, but may also lead to greater confidence about the overall process of change associated with new educational programming.

Learning Projects: An Overview

Selecting a Project Focus

Perhaps the most difficult part of a learning project is selecting the particular aspect of educational practice that you would most like to develop or change. Alan Tough (1971) studied successful adult learners and identified the following characteristics of worthwhile learning projects:

Worthwhile Learning Projects

- build on our strengths or interests
- serve a purpose in our lives
- frequently come from an inner drive—we do the learning projects for ourselves, not for others
- respond to our need to be challenged, to pursue excellence, or to better ourselves
- need to be congruent with our values or personal integrity

As you think about possible projects you might want to pursue, test each idea against these criteria until you find the one that makes you say, "Ahhh . . . now that's worth doing." Here are some questions to ask as you consider the alternatives:

Weighing the Alternatives

- Will I learn something new and worthwhile from this project?
- Will this project help me become a better facilitator of students' learning?
- Is this focus worthy of a significant investment of time and energy?
- Is this project consistent with current educational policy and the principles of teaching, learning, and assessing?
- Is this focus clear enough that I can identify specific practices I want to try?
- Can I develop a project plan that is manageable within the available time frame?

Choosing a Goal or Question for Inquiry

The choice of goal or question for inquiry, the scope of the project, and the level of challenge involved will differ from one individual or group to the next, depending on each participant's background, previous experiences, and current educational situation. The most frequent problems that educators encounter in selecting a goal or question for inquiry are being too vague and being too ambitious. It is important to distinguish between your long-term vision of what might be possible several years from now and what makes a manageable goal or question to get you started on that path.

Here is one way to sort through the possibilities and find a realistic goal or question for inquiry within your focus:

Narrowing My Focus

- *I should . . .*
  All the things I might work on if I had unlimited time, energy, and resources.
- *I could . . .*
  Several important priorities I could reasonably and realistically work on if I focused my energy.
- *I will . . .*
  One important priority to start with right now.

Creating an Action Plan

Once you have identified a realistic focus and a goal or question for inquiry, you can begin to map out a tentative action plan to guide your activities. Keep in mind that this is a plan to help you learn something worthwhile about curriculum, instruction, and assessment, as well as to have a positive impact on your work. Fullan and Miles (1992) describe the following characteristics of effective action planning:

Effective Planning

- is co-evolutionary with action: "do, then plan . . . and do and plan some more" (Fullan and Miles, 1992, 749)
- involves and is "owned" by the people who carry out the action
- considers the values and priorities of the participants
- fits within the context of a larger vision
- is clearly focused on a goal or question
- is manageable
- is flexible
- is worth the commitment of time, energy, and resources

Honouring Your Natural Learning Approach

One key to creating an effective action plan is to choose learning activities and strategies that match your natural approaches to new experiences. Some people like to plan in careful steps, with clearly defined tasks and time lines leading toward an outcome. Others learn in a more exploratory fashion, beginning with a puzzle or a question they want to "figure out" and using a process outline to remind them of what they might do. *Vision to Action* contains information and activities that may help you determine which approach is more natural for you.

Building in Flexibility

Most planners in education now recognize that the future cannot be predicted or controlled; however, by keeping the end goal in view, being proactive rather than reactive, and making deliberate choices, we can influence how events evolve. Each phase of action contains opportunities to learn from our experiences. As we move forward, our actions may open new possibilities or we may discover unexpected barriers. Changes in plans may not only be desirable, but may also be necessary.

Treat your plan as a map and itinerary for a trip you want to take, and develop it in enough detail so that you can make it happen. However, if you find a better path during the project, or discover a more important destination, permit yourself to take advantage of the opportunity.

Setting up a Support System

Although each teacher in a school might engage in a different learning project, colleagues can provide invaluable support in the form of encouragement, specific suggestions, empathy during times of challenge, problem-solving ideas, or constructive feedback. You are encouraged to identify a small support group with whom you regularly discuss your activities. You might begin in your small group by helping each other develop your action plans. It is not necessary for all support group members to have the same goals. In fact, it may be advantageous to have a variety of projects represented in your group, so that you can learn more from the diversity of individuals' experiences. Here are some suggestions for organizing a support group:

Organizing a Support Group

When setting up a support group for your learning project, consider the following criteria:

- compatibility of group members
- similarity of teaching situations
- variety of backgrounds and experiences
- ease of getting together between classes
- optimal size of group (three to five usually works well)

Getting Started

Once you have mapped out a plan for your project, specify what your first action step will be. It is easy to procrastinate until guilt catches up and takes the fun out of the learning process. This resource contains two frames for planning your first week's activity (see section 4.1).

Keeping Track of Your Learning

As part of your plan, identify some of the strategies you will use to gather evidence of both what you do in the project and what you learn from your activities. A reflective journal or thinking log is an effective means of maintaining an ongoing record of your activities, feelings, thoughts, and understanding. As well, you may wish to collect evidence of your project activities in the form of photographs, audiotape or videotape exhibits, student work samples, interview or questionnaire data, or whatever form of record keeping suits your project. Some suggestions for demonstrating your learning to others are provided below:

Demonstrating Your Learning

You may wish to demonstrate your learning to others with representations that describe and illustrate

- what happened during your project
- what you learned from your project
- how your learning affected you and others (e.g., students, parents, and colleagues)
- how your learning affected your understanding of curriculum, teaching, learning, and assessing
- how your learning will influence your future directions as an educator

Creating a Portfolio

A portfolio is one way to show others that you are engaged in constructive learning about educational change. It should give the best possible impressions of you as a learner and thoughtful professional. Therefore it needs to speak with your voice, tell your story of learning, and show the audience what you did, how you did it, and what you learned.

There are many different forms your story could take. You might, for example, include representational devices such as

- a map of your journey
- a flow chart of your activities
- a calendar of key events
- a Venn diagram showing your thinking or teaching behaviour “then” and “now”

Examples of your work with students are valuable, provided your audience understands why they are included, and as long as they do not overburden the portfolio.

The key to a powerful portfolio is to be selective. Quality is more important than quantity, and the audience should be able to understand clearly why each item is included and how it plays a part in your story. Keep in mind that each item in the portfolio should be evidence of some aspect of learning.

Selecting Your Portfolio Items

In selecting items for your learning portfolio, ask yourself,

- What does this piece of evidence show my audience?
- How will the audience know why this is important to me?
- How will the audience know how this evidence is connected to my story of learning?

Continuing the Learning Process

Educators who regularly use the learning project approach to educational change find that one project usually leads to another. Learning is naturally ongoing and developmental, and a learning project often raises new questions that lead to further exploration. An important part of the learning project approach is to take stock regularly by pausing to look back at what we have learned, and to revise or renew the project plan. Through informal or formal celebratory events we can acknowledge one another's efforts, accomplishments, and growth.

How to Use This Resource

This resource has grown out of ongoing work with educators in a variety of contexts. It can be used in many ways—by individuals, small groups, departments, school staff, curriculum committees, consultants, and administrators—in any situation involving educational change.

Vision to Action presents educational change topics as a cycle moving from vision through action to reflection, although this process is more complex and organic than it might appear in this resource. The cycle is meant to be viewed as a general pattern of activity that can be adapted to suit your situation; it is not meant to be prescriptive. You are invited to try the ideas, reshape them, and share them with others in whatever ways you find helpful.

Vision to Action is designed in such a way that the sections and topics can stand alone and work together. Each of the five sections in this resource deals with one dimension of the change process:

1. The Big Picture
2. Human Dimensions of Change
3. Planning a Project
4. Making It Happen
5. Tracking Progress

The various topics within each section are presented as two-page layouts that can be used for self-study, group discussion, or workshops. Each topic contains the following components: propositions, assumptions, starting points, and process tools. Most topics also contain margin quotations. These components are described in the sample two-page layout below:

Propositions

Key statements that highlight the main ideas about the topic

Process Tools

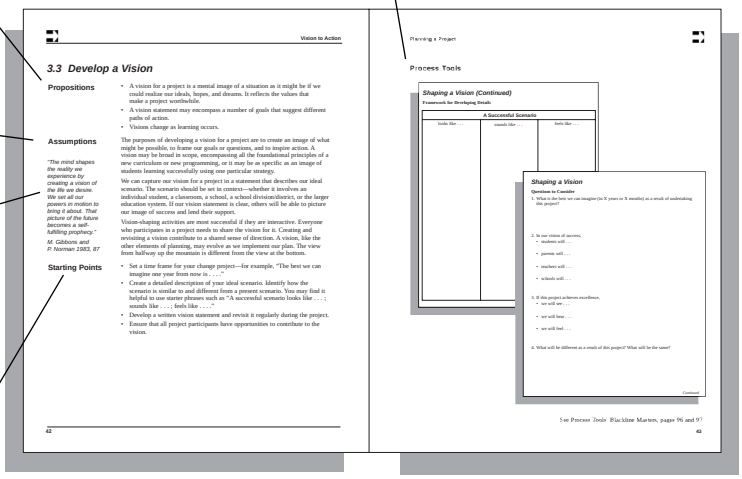
Examples of ways to work with the topic individually or collaboratively

Assumptions

Brief explanation of the thinking behind the propositions

Margin Quotations

Excerpts from published writings to stimulate further thinking



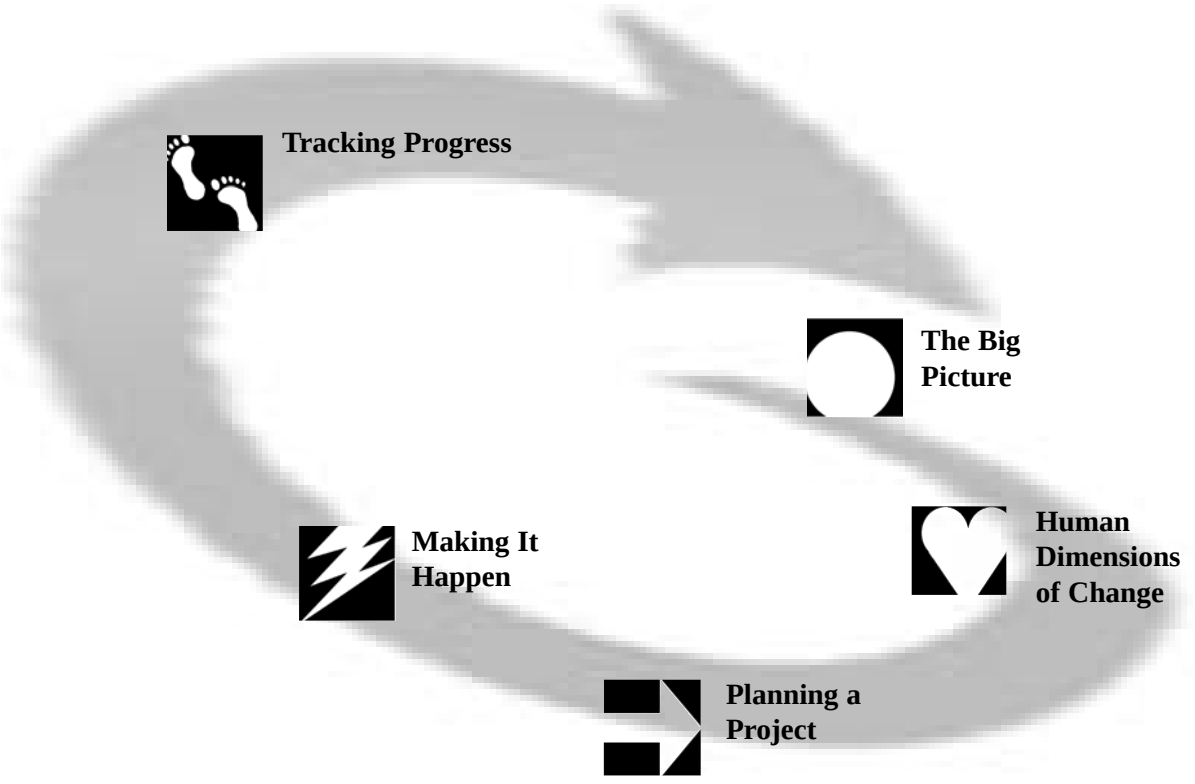
Starting Points

Suggestions for exploring the propositions in your classroom, school, or workplace

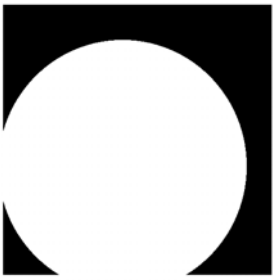
Process Tools: Blackline Masters

The process tools appear in the final part of this resource as full-page blackline masters for use as overhead transparencies or interactive worksheets.

Vision to Action



1. The Big Picture



1.1 The Context for Educational Change

Propositions

- Students face an uncertain future. Schools are responding by seeking a better balance between teaching knowledge, skills, and strategies and developing students' capacity to learn how to learn.
- Changes in education reflect larger patterns of change in our communities and society. Schools are part of a larger ecosystem.
- Individually and in groups, educators can influence, and are influenced by, changes in the larger system.

Assumptions

Our society is in the midst of fundamental changes. Communication and technological innovations, diminishing resources, and environmental, economic, and social stress have pushed existing systems beyond their limits. Innovative ways of thinking and learning are needed to solve present and future problems. New foundation skills are emerging in areas such as literacy and communication, problem solving, human relations, and technology.

At the same time, educators world-wide are rethinking assumptions about the nature of learning. Diverse movements such as cooperative learning, teaching for thinking, multiple intelligences, and self-directed learning have reached common conclusions about the characteristics of effective learning. As they study children's development, researchers and educators discover similar principles: learning is an active process; children learn at a variety of rates and through a variety of means; and learning is both a social and individual process.

This period of significant social change requires a renewal of our education system. Manitoba's *Renewing Education: New Directions* initiatives provide a catalyst for significant changes. Its recommendations for educational change reflect larger trends that have been developing for a long time. They are part of a complex ecosystem.

We all share the responsibility to create viable learning environments that prepare students for an uncertain future. We can act by working on ourselves, working with others, and/or seeking influence in a larger arena. Because we are part of an interrelated whole, our choices and actions make a difference.

Starting Points

- Read and note the sections on change in Manitoba's educational renewal documents, *A Blueprint for Action* (1994), *The Action Plan* (1995), and *A Foundation for Excellence* (1995). Record your reactions in a professional journal and discuss them with colleagues.
- Think about changes that have happened recently in your community. Analyze the links between these changes and broader social and global trends discussed in the educational renewal documents.

Process Tools

Understanding Change

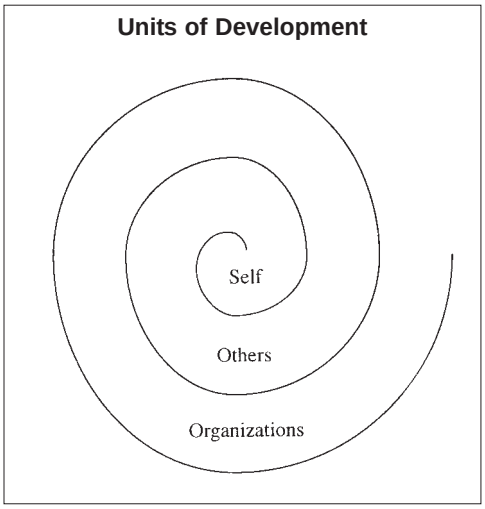
Questions to Consider

1. What recent changes in your community are mirrored in your school or workplace?

2. How have recent changes affected your local education system and the people involved—learners, educators, and the community?

3. What actions have you taken to respond creatively to these changes?

4. What actions could you take?



See Process Tools: Blackline Masters, page 81.

1.2 Beyond the Shrink-wrap

Propositions

- Policy and curriculum documents present a framework within which thoughtful educators make decisions about how to support student learning.
- Curriculum, teaching, learning, and assessing encompass far more than what is inside a shrink-wrapped curriculum document. They involve living transactions between teachers and students.
- In classrooms, schools, and school divisions/districts, educational decisions are influenced by local considerations such as students' requirements, community issues, and availability of resources.

Assumptions

Policy and curriculum documents can be seen as propositions about the best way to organize education. Like all propositions, they need to be tested and refined in the applicable contexts—classrooms, schools, school divisions/districts, and provincial jurisdictions—that are affected by them. As Michael Fullan (1991) has noted, neither centralization nor decentralization works, but rather a judicious balance is necessary for educational reform. In times of diminishing resources, that balance is especially difficult to achieve.

"Good teachers are necessarily autonomous in professional judgement . . . . ideas . . . are not of much real use until they are digested to the point where they are subject to the teacher's own judgement."

L. Stenhouse, 1984, 69

Manitoba's new mathematics and English language arts curricula, for example, are based on the common curriculum frameworks developed collaboratively by the four western Canadian provinces and two territories and use a learning outcomes approach. Although the outcomes are mandated, educators are encouraged to develop diverse instructional strategies and methods to help students achieve the outcomes. They are also encouraged to use a wide variety of tools to assess and evaluate student progress and achievement.

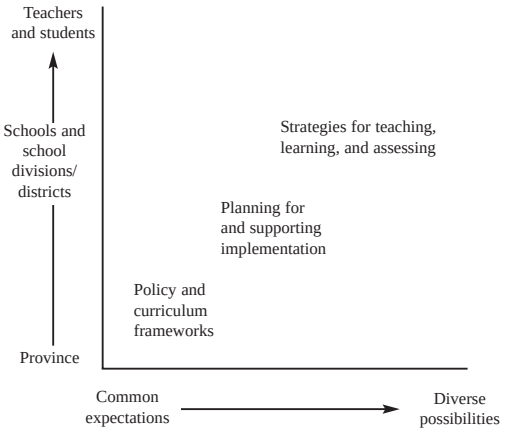
Teachers are users, choosers, and developers of curriculum. As they make their thousand and one daily decisions about integrating curriculum, instruction, and assessment, teachers must consider their students and local conditions, and apply their professional judgement.

Starting Points

- Review the most recent drafts of policy and curriculum documents in your area(s) of interest.
- Set up study groups to review and summarize specific portions of documents. Report back to one another using a jigsaw or carousel format in which each individual contributes something to the learning of the group.

Process Tools

Analyzing Curricular Change



Questions to Consider

1. What does the above diagram suggest to you about the nature of curricular change?

2. In what ways does your educational community participate in implementing new curricula?

3. What activities might the local community undertake to shape appropriate curricula for your context?

See Process Tools: Blackline Masters, page 82.

1.3 Everyone Is a Change Agent

Propositions

- In times of rapid change, new understanding and processes are needed to guide educational decisions.
- Educators contribute to new directions by developing and refining alternative approaches to teaching, learning, and assessing.
- Dealing with change involves both reactive and proactive strategies.

Assumptions

Transformational changes in education and society are both exhilarating and terrifying. In an age of paradox and confusion, we are all explorers. Nobody has a complete map of the territory we have entered. New understanding and different structures are needed to achieve a balance between change and order.

New learning for students requires new learning for teachers. School-based educators can play a vital role in developing and refining new programming and curricula as they strive to enable all students to succeed.

For many of us change is an uncomfortable process. We may long for the security of the past, when things seemed stable, but clearly we cannot turn back. Our personal and collective challenge is to adapt to the reality of constant change. Educational renewal is a long-term process where all levels of the system must contribute to shaping the future. Everyone is an agent of change.

Being a change agent involves both responding thoughtfully to changes proposed by others, and developing our own capacity for self-directed action.

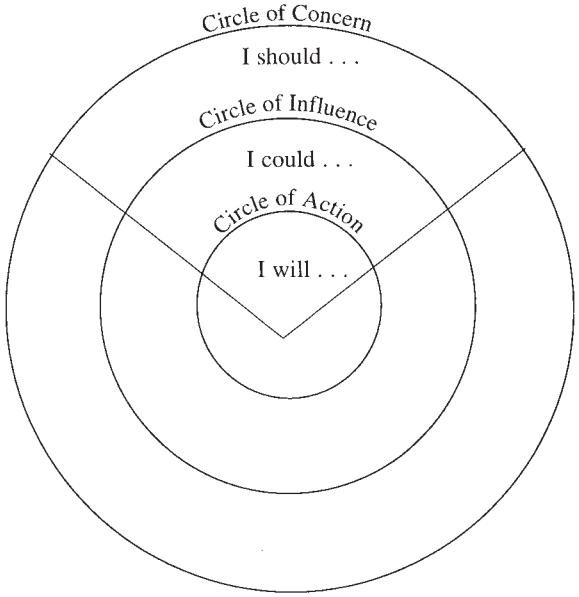
Starting Points

- Think about recent changes in your educational practice. Identify some of the forces that caused these changes. Analyze the part you played in how the changes came about.
- Reflect on a situation in which you have been an agent of change. Recall the strategies you used to help bring about change.

Process Tools

Determining Your Circle of Influence

There is little point in worrying about things we cannot change. We can use our energies more effectively if we focus on a few areas where we are most likely to make a difference. Effective change agents identify and pay attention to areas they believe they can influence. Then they choose only one or two at a time as their priorities for strategic action.



Suggestions

1. List all your worries about educational change. Print each one on a self-stick note and place it in the **circle of concern.**
2. If you think you could take action to influence specific items in your circle of concern, move them into your **circle of influence.**
3. Choose one item from your circle of influence and put it in your **circle of action.** Decide how you might take constructive action on this item.

See Process Tools: Blackline Masters, page 83.

1.4 A Project Approach to Planned Change

Propositions

- One way to manage change is to initiate individual or group projects that address participants' most important concerns.
- Successful projects are built on action plans that are both manageable and challenging.
- When educators design and implement projects that deal with issues of change, they become more confident and skilled models of learning for their students and colleagues.

Assumptions

In the early 1970s, Alvin Toffler observed the increasing volume, speed, and complexity of change and coined the term "future shock" to describe our condition. In education, change is non-linear and has a bewildering array of variables. We seem to spend most of our professional lives responding to the demands and forces around us. Sometimes, however, we need to take initiative and make something happen. Such intentional acts are most likely to be successful if they address issues that are truly significant to us.

"The teacher now becomes the inquirer, and the classroom a laboratory in which techniques and new ideas are constantly being tested and practices continually being examined to discover the hidden assumptions and motives underlying them."

M. Wideen and I. Andrews, 1984, 196

Vision to Action is based on the premise that undertaking a learning project is a fundamental strategy for dealing with change. We simply cannot cope with all the demands of change at once. By focusing on one aspect of change, individually and/or in project groups, we can build on current strengths and explore new options in manageable ways. The action planning process encourages us to design projects that are manageable and challenging. By pushing ourselves beyond the known and familiar, persevering in the face of difficulties, and experiencing success, we develop moral purpose and confidence.

Action projects develop a sense of efficacy—the feeling that what we do makes a difference. The decision to focus our energy, deciding where we are going and striving to get there, brings out the best in us and those around us. By sharing our struggles with students and colleagues, we model learning and thoughtful action rather than externalizing blame or rationalizing ineffectiveness.

Starting Points

- Think of an important activity you have recently launched. Briefly review the last year and identify personal challenges: things you have studied, accomplished, built, discovered, created, or changed—whether at work, at home, or in other circumstances. Jot down key words for what you achieved, how you did it, problems you faced, and rewards you experienced. Look for patterns in your style of accomplishment.
- Share your experiences with a friend or colleague.

Process Tools

Understanding Learning Projects: Interview Activity

Talk to colleagues, students, or others about their self-directed learning projects.

Questions to Consider

1. Can you recall a powerful, self-planned learning activity you conducted within the last year?
2. Why did you undertake the activity?
3. What methods did you use?
4. What materials and resources were helpful to you?
5. In what ways did other people assist you?
6. What satisfaction did you derive from this activity?
7. What did this experience teach you about how to learn and be successful?

Interview Responses

Reference: A. Tough (1971).

See Process Tools: Blackline Masters, page 84.

1.5 Conditions That Support Change

Propositions

- The necessary tension between vision and reality often creates dissonance.
- Organizations that consciously strive to support purposeful learning are better prepared for the dissonance resulting from change.
- Conditions that support change include
  - vision and focus
  - freedom to take risks
  - collaboration
  - access to models and mentors
  - time
  - a work environment that is conducive to reflective thinking

Assumptions

"It is as a result of interaction that things can be seen differently, choices appear, and action is supported."

G. Binney and C. Williams, 1995, 145

Creative tension between a vision of where we want to be and an understanding of current reality provides the energy to move us forward. It also creates anxiety and dissonance. Working through self-doubt and uncertainty—the internal noise—is a critical part of gaining confidence. The challenge is to have a realistic sense of the present and also believe in our capacity to transform it through our own activities in concert with others. We must trust ourselves and one another to develop alternatives, knowing that change is confusingly non-linear and requires support in the form of time, resources, and encouragement. Caring relationships and the capacity for courage and hope are vital considerations in the struggle to renew ourselves and our schools.

To be successful, today's organizations must view themselves as dynamic learning systems oriented toward continuous improvement (Senge and Lannon-Kim, 1991). A learning organization values collaboration and inquiry and uses natural human motivation by focusing it on a powerful shared vision. It also encourages each of us to experience the satisfaction of continually improving the system through our everyday activities.

The most important factors that support change are within us. Enthusiasm for learning, courage to experiment, an attitude of inquiry, willingness to collaborate, thoughtful reflection, and critical awareness of our mental models are some conditions over which we have control.

Starting Points

- Evaluate your educational setting. Identify factors that support change as well as factors that appear to be limiting.
- Assess the part you play in supporting or limiting change for yourself and your colleagues.
- Create a vision of the most supportive environment for change that you can imagine.
- Compare your vision to your reality. Ask yourself what improvements you could make with the resources you presently have.

Process Tools

Assessing Your Organization

Disciplines of a Learning Organization

- *Personal mastery:* Everyone in the organization is committed to ongoing self-directed and purposeful learning.
- *Mental models:* Individuals and groups in the organization examine their underlying assumptions and work to develop shared understanding.
- *Shared vision:* Activities of the organization are directed toward recognized ideals, purposes, and goals.
- *Team learning:* The organization supports communities of learners and practices synergy.
- *Systems thinking:* The organization is viewed as part of a larger system and all activities and events are seen as interrelated.

Reference: P. Senge (1991).

Suggestions

1. Evaluate your learning organization (e.g., department, school division/district, or school). Assess the degree to which your organization demonstrates the five disciplines listed above.

2. Identify individual and collective actions that could improve your capacity as a learning organization.

See Process Tools: Blackline Masters, page 85.

1.6 School and Community

Propositions

- Education is a shared responsibility. The importance of community participation in education is increasingly acknowledged through legislation that gives groups such as parents a greater role in education.
- Parents are interested in understanding new developments in education and finding ways to support their children's learning.
- The community offers an array of resources to support learning, which educators do not always utilize fully.

Assumptions

"What the best and wisest parent wants for his [or her] own child, that must the community want for all of its children."

J. Dewey, 1944, 295

Increasingly, we recognize that the education of young people goes far beyond what happens during the school day. From Kindergarten to graduation from the Senior Years, students in our society spend only about 10 percent of their time in school. Social and economic influences, family, peers, and constant exposure to media and new communication technologies all play an educational role.

The African proverb "it takes a whole community to raise a child" echoes our emerging sentiments. The scope of shared responsibility is being enlarged through changes in policy and school governance. Although Manitoba school divisions/districts have a long history of involving community committees in school decision making, many schools now also have Advisory Councils on School Leadership. Such partnerships promote greater awareness of how home-school relationships influence the quality of student learning.

Partnerships between parents and educators offer great promise. The challenge of preparing young people for the future is formidable. There is a growing need to cooperate more fully with parents and community agencies in the integrated delivery of services to youth and in developing out-of-school learning options.

In addition to parents, potential partners in education include government departments, public agencies, business organizations, Chambers of Commerce, computer companies, not-for-profit associations, and others.

Starting Points

- Find out how well the Advisory Council for School Leadership is working in your school. Talk to parents, teachers, and others involved about their views on the advisory process and how it can be developed further to benefit the school.
- Survey the students in your class about the events and activities outside of school that have an influence, both positive and negative, on their learning.

Process Tools

Developing a School Profile

Suggestions

Invite teachers, parents, students, and community members to help you create a school profile. Use the information they provide to set priorities for action and to initiate community dialogues about what is important to all participants. The following framework can be used to gather information or to structure small-group school-community discussions:

1. Phrases that describe our school:

2. Our educational strengths:

3. Areas that could be improved:

4. Hopes for the future:

5. Priorities for action:

See Process Tools: Blackline Masters, page 86.

2. Human Dimensions of Change

2.1 Change from the Inside Out

Propositions

- Educators base their personal understanding of curriculum, teaching, learning, and assessing on their mental models and assumptions about how the world works.
- As conditions change, mental models need to be re-examined. Real change involves reframing as well as restructuring.
- Reviewing and reconstructing mental models are ongoing individual and social processes.

Assumptions

"We must recognize that learning takes place from the inside out, not the outside in. Neither teachers nor those they teach change simply by giving them information, by being told about theory and research or new approaches. Unfortunately, we often equate knowledge with information."

A. Jaggar, 1989, 78

We make educational decisions and judge new ideas based on mental models—our beliefs and assumptions about reality. If a new idea is not compatible with our assumptions, we may reject it or distort it to fit our current thinking.

Sometimes we can be trapped by previous success. As society changes, previously useful mental models may no longer be functional. The assumption that schools should prepare students to be competitive, for example, is yielding to lessons from the business community, which now values team skills and cooperation over individualism and competition.

Change involves holding our assumptions up to scrutiny. This does not mean abandoning important human values; indeed, we need to reaffirm our basic social and educational principles and rethink how we can realize them in a changing society.

As we work together to understand new policies and curricula, we can help one another reshape our mental models of teaching, learning, and assessing. Tolerance, respect, collaboration, and a willingness to consider alternatives are integral to this process.

Starting Points

- Analyze your own mental models. Ask yourself about the assumptions that guide your educational decisions.
- In *The Seven Habits of Highly Effective People* (1991), Steven Covey reminds us to "seek first to understand, then be understood." As you work with colleagues to interpret new curricula, challenge yourself to listen deeply and understand the assumptions behind their positions.

Process Tools

Working with Mental Models

Suggestions

1. Identify a controversial issue arising from curricular change.

2. Write a position statement about the issue.

3. List arguments that support and arguments that c
   Discuss the assumptions behind each argument. E
   between your mental models.

Arguments for . . .	U
Arguments against . . .	U

4. Identify areas of common belief and areas w

Working with Mental Models

Suggestions

1. Identify a controversial issue arising from curricular change.
   Should teachers insist on error-free student work at the publishing and presentation stages of the writing process?

2. Write a position statement about the issue.
   Teachers should ensure that all errors in mechanics (e.g., spelling, punctuation, and capitalization) are corrected in any writing that is to be published or presented.

3. List arguments that support and arguments that challenge the position statement. Discuss the assumptions behind each argument. Explore similarities and differences between your mental models.

Arguments for . . .	Underlying assumptions . . .
• Students must learn to work to an acceptable standard. • Parents expect to see correct spelling, punctuation, and capitalization in presentations and published work.	• Students must learn the conventions and understand that they are expected in presentations and published work. • If a child brings home work with errors in it, parents will think the teacher is not doing his or her job.
Arguments against . . .	**Underlying assumptions . . .**
• Students should not be expected to correct errors in mechanics that are beyond their level of development. • Students, not teachers, should be responsible for editing and proofreading their writing.	• Writing is a complex process that improves with practice. • Students should retain ownership for their own writing.

4. Identify areas of common belief and areas where you will "agree to disagree."
   Common belief: It is important to maintain high standards of accuracy.

   Agree to disagree:
   - All mistakes should be corrected.

   vs.

   - It is not necessary to correct all mistakes. Select certain mistakes on which to concentrate.

See Process Tools: Blackline Masters, page 87.

2.2 Educators as Learners

Propositions

- New policies and curriculum frameworks challenge educators to rethink assumptions, unlearn past patterns, and explore new approaches.
- Change is more manageable when viewed as a learning opportunity.
- Awareness of personal learning profiles can help us understand our own and others' responses to change.

Assumptions

" . . . you cannot improve student learning for all or most students without improving teacher learning for all or most teachers."

M. Fullan, 1996, 423

Fundamental change pushes us beyond improvement to transformation. Implementing a new curriculum, for example, involves inquiry, risk taking, practice, reflection, and self-evaluation, all of which are basic elements of learning. For many of us the greatest challenge is letting go of old ways to make room for new.

Educators, like all learners, differ in rates of and approaches to learning. Our individual paths are influenced by prior knowledge and experience, educational beliefs, personality, learning style, attitudes, self-esteem, and confidence. We are also affected by environmental factors such as expectations of others, relationships with colleagues, access to models and mentors, and time to reflect.

A personal learning profile summarizes the knowledge, skills, strategies, and needs we bring to the learning process. Profiles can be used as a basis for building action plans and shaping professional environments that support educational change.

Each of us has a profile that reflects our unique characteristics. No individual can be competent in everything, but when we collaborate with other educators our differences can be complementary and enhance our learning.

Starting Points

- Think about a past experience in which you had to learn something new or make a major change in your life. Use the situation to help you identify specific personal characteristics you bring to learning.
- Use your profile as an opportunity to recognize strengths. Be your own advocate! Also note areas that need development and consider ways to address them constructively.
- Identify colleagues whose characteristics and abilities complement yours. Discuss ways to draw on one another's strengths.

Process Tools

Developing a Personal Learning Profile (Continued)

Self-Assessment of Learning Strategies

I am able to	beginning	developing	well-developed
• identify a learning goal or question for inquiry	_____	_____	_____
• make an action plan to guide learning	_____	_____	_____
• seek and locate relevant learning resources	_____	_____	_____
• organize and manage significant learning activities	_____	_____	_____
• assess personal learning characteristics and strategies realistically			
• accept challenges and take risks in learning			
• work collaboratively in a community of learners			
• monitor learning through critical reflection and self-evaluation			
• demonstrate my learning for others			

Developing a Personal Learning Profile

Questions for Reflection

1. How would you describe yourself as a learner?

2. How have you managed major changes in the past? What strategies and skills did you learn from these experiences?

3. When you learn something new, how do you usually go about it?

4. What challenges you most when you are trying to learn something new? How do you usually deal with these challenges?

5. What conditions help you to learn most effectively? What factors are most important in your learning environment?

6. What is most likely to hinder your learning? How could these hindrances be avoided?

7. What learning characteristics do you value most?

Continued

See Process Tools: Blackline Masters, pages 88 and 89.

2.3 Orientations to Change

Propositions

- Change involves a dynamic balance between action and reflection.
- Some people prefer to work toward specific goals with pre-established outcomes, whereas others are more comfortable exploring the unfamiliar through inquiry.
- Different orientations to change enhance one another when viewed as complementary rather than opposing.

Assumptions

"The art of progress is to preserve order amid change and to preserve change amid order."

A.N. Whitehead

Some of us deal with change by setting goals, planning strategies, and specifying outcomes in advance. Others prefer to investigate key questions or explore issues without predetermining results.

We may feel anxiety, frustration, or resistance when asked to follow an approach that is not compatible with our natural orientation to change. We tend to align ourselves with colleagues whose orientations are similar to our own. Differences among individuals can cause friction unless they are understood and acknowledged.

Change involves both achieving outcomes and discovering new insights along the way. If we focus too narrowly on predetermined outcomes, we may miss out on unanticipated learning. On the other hand, we cannot ignore the need to demonstrate results in our change efforts. It is important to find a balance between outcomes and inquiry orientations and to understand the contributions of each.

The decision to pursue a specific outcome or explore a question is determined partly by the kind of change involved in a particular situation. Business educators, for example, must master the information technology skills that advances in their field demand. In this context, the direction of curricular change may be clear with relatively specific teacher learning outcomes. In contrast, educators attempting to integrate students with special needs into regular classrooms are often entering unexplored territory. Although the change may be guided by sound principles, new practices must be created and tested. In this instance, predetermined expectations may work against success and an inquiry orientation may be more appropriate.

Starting Points

- Identify your natural orientation to change. Think about how it affects your work as an educator and your readiness to embrace elements of change.
- Compare your orientations to change with those of colleagues. Identify where areas of tension could arise because of differences. Discuss how you might turn your differences to advantage.

Process Tools

Understanding Orientations to Change

Outcomes Orientation	Inquiry Orientation
• set goals	• identify a question
• make a plan	• explore possibilities
• identify resources	• investigate resources
• manage change activities	• respond to experiences
• demonstrate results	• represent understanding
• evaluate outcomes	• reflect on learning

Questions to Consider

1. What are some of the benefits of an outcomes orientation toward change? What are some of the limitations?

2. What are some of the benefits of an inquiry orientation? What are some of the limitations?

3. Identify some of the changes you currently face. When might it be useful to focus on outcomes? When might you want to adopt an inquiry approach?

See Process Tools: Blackline Masters, page 90.

2.4 Attitudes Toward Change

Propositions

- Anxiety is a natural part of significant change.
- Fundamental change takes time and requires patience and support.
- Some people find change more difficult than others.

Assumptions

"When teachers are rethinking their beliefs about children, curriculum, teaching, and learning, they need to be as patient with themselves as they are with students and colleagues. Self-doubt, ambiguity, and uncertainty are part of the process of clarification and understanding."

D. Watson and M. Stevenson, 1989, 128

The uncertainties of change frequently bring feelings of insecurity. As we revise our mental models, we may feel scattered and confused. We may doubt our capacity to meet changing expectations and fear the possibility of failure. Faced with changes we have not initiated, we may feel that our existing skills and strengths are not appreciated. If the proposed changes conflict with our beliefs, we may also resent being asked to stake our reputations on what appear to be unproven ideas.

For most of us, significant change takes time and patience. Sometimes anxiety causes us to adopt a negative attitude or to worry excessively about factors beyond our control. Our professional confidence comes from feeling competent, responsible, and accountable, and moving through the ambiguities of change can be a humbling experience.

Some of us find change more difficult than others. If we value tradition, any change may bring a sense of loss. Complaints often signify a natural and necessary grieving process. We need time to question, to doubt, and to critique. If we enjoy and even seek change, new trends can stimulate excitement and enthusiasm.

People often misinterpret one another's attitudes. On the one hand, caution may be perceived as inflexibility; on the other, enthusiasm may appear impetuous or foolhardy. When we accept one another's feelings and respect our differing attitudes toward change, we each gain support to move forward at our own pace.

Starting Points

- Assess your attitude toward change. Acknowledge your feelings and try to identify their sources.
- Study the effects that your ideas, actions, and language have on others. Avoid raising red flags or causing divisions by setting up opposing sides on sensitive issues.
- Reflect on past discussions about change. Consider what you could do to support your colleagues in moving forward.

Process Tools

Dealing with Concerns

Suggestions

1. Identify a proposed change that affects you.

2. List your concerns about this change.

3. Classify the items on your list using

1 = This is worth doing something a
2 = We do not know what will happ
3 = We could change this, but it wou
4 = This is beyond our control. Let's

4. Prioritize the items classified under
first.

5. Turn the highest priority concern int
"I will . . .").

6. Revisit the list of concerns regularly
changed.

Dealing with Concerns

Suggestions

1. Identify a proposed change that affects you.

   Staff at our Senior Years school are considering a quarter system, with students taking two subjects per quarter. The purposes are to lower student-teacher ratios and to provide opportunities for teachers to work together in related subject areas.

2. List your concerns about this change.

2	Teachers are not used to working in large time blocks.
2	Some teachers do not want to work with anyone else.
1	Students might get bored in large time blocks.
2	Students might forget foundational material if they miss a subject area for a term.
1	Some students need longer than one quarter to complete a course.
2	If subject areas are integrated, students might not be prepared for examinations.
3	Some parents will object to these changes.
1	The computer time tabling program will have to be rewritten.
4	We do not know whether the pendulum will "swing back" in the future.

3. Classify the items on your list using the following categories:

1 = This is worth doing something about.
2 = We do not know what will happen until we try. Let's monitor the situation.
3 = We could change this, but it would take more effort than we want to invest.
4 = This is beyond our control. Let's not waste energy worrying about it at this time.

4. Prioritize the items classified under category 1, putting your most important concerns first.

1	Students might get bored in large time blocks.
1	Some students need longer than one quarter to complete a course.
1	The computer time tabling program will have to be rewritten.

5. Turn the highest priority concern into an action statement (e.g., "We will . . . ," or "I will . . .").

   We will make sure that each class period has at least four different strategies, each one appealing to a different learning style.

6. Revisit the list of concerns regularly to see whether feelings and attitudes have changed.

See Process Tools: Blackline Masters, page 91.

2.5 Communities of Learners

Propositions

- Change often seems more manageable when we learn together.
- Educational settings provide many opportunities to develop learning communities.
- Learning communities take a variety of forms.

Assumptions

" . . . principals, teachers, students, and parents learning together can create within their schools an ecology of reflection, growth, and refinement of practice: in short, a community of learners."

R. Barth, 1990, 162

Teachers often work in isolation and see professional growth as an individual matter. As social values shift from individualism to teamwork, however, educators are discovering that learning together is a powerful strategy for managing change. A culture of collaboration and a sense of community emerge as colleagues and partners work together on common goals.

Learning communities, such as teaching partners, support networks, action research groups, and staff engaged in school improvement projects, can be informal or highly organized. A community of learners is defined as much by the participants' attitudes to learning and ways of interacting as by the group's structure.

A community of learners provides a safe environment for taking risks and confronting challenges that we might otherwise avoid. In such a community, learning is ongoing and everyone is both a learner and a teacher. Time is devoted to focused reflection. Each individual has a voice and can count on being heard.

Each of us strives to make sense of new information in our own way. When we explain our understanding or articulate questions to others, we test our interpretations and learn from each other's thinking. The tension that occurs as we clarify concepts, discuss issues, and challenge assumptions may be unsettling, but it also reassures us that we are not alone in our struggles.

The benefits of participating in a learning community extend to most aspects of educational change. Together we can discuss feelings, set goals, design and implement new strategies, review or develop resources, help one another solve problems, and provide ongoing support for learning. By recognizing and celebrating individual and collective growth, we generate energy to sustain our efforts.

Starting Points

- Set up a small group that meets regularly. Discuss ways to support one another.
- Talk with others about learning in progress. Compare your experiences as you investigate new curricula or other educational changes.
- Set aside time in staff meetings to share "Aha's" and solve problems together.
- Visit colleagues' classrooms and ask about what they are working on. Use colleagues as models and mentors.
- Be a model of active learning. Invite and welcome others into your learning.

Process Tools

Creating a Group Profile

Characteristics of a Learning Community

- Each individual is actively engaged in learning.
- The learning of each group member is visible to others.
- Learning is celebrated and enjoyed.
- Learning is sustained over time.
- Group members talk with one another about their practices.
- Group members share knowledge of their craft with one another.
- Group members observe one another's engagement in daily activities.
- Group members help one another become more skilful.
- Individuals in leadership positions engage in, display, and model learning.

Suggestions

1. Think about an educational group or community to which you belong (e.g., your classroom, a teacher learning-project group, a department, school staff, school division/district, curriculum committee, and parent-teacher group).

2. Analyze your group using the characteristics listed above.

3. Identify ways in which your group could further develop its effectiveness as a community of learners.

Journal Reflections of an Early Years Teacher

"The interaction with my peers gave me a broad spectrum from which to decide where I was feeling confident and comfortable, where I was stretching and risking, and where I wanted to make additions and improvements . . . . Being with teachers of all levels was a learning experience for me. It broadened my horizons and it made me feel pride in the job I am doing . . . . "

See Process Tools: Blackline Masters, page 92.

2.6 Building on Strengths

Propositions

- Despite pressures and demands, schools continue to provide stability and quality learning environments.
- With the volume, speed, and complexity of change increasing, it is important to remind ourselves of the things we do well.
- We need to honour and encourage success by celebrating our achievements as we struggle to make a difference in students' lives.

Assumptions

"In times of rapid change, uncertainty and stress, each of us is challenged to find a path we can walk with confidence, pride and hope. In times rich in opportunity, stability and plenty, we are challenged to realize the potential open to us. In the worst of times and the best of times, we are challenged by the realization of how excellent we can be."

M. Gibbons and P. Norman, 1983, 5

Public education has never before seen the criticism and debate that characterize our current experience. The media seem to focus primarily on the real and perceived shortcomings of our schools. Often the public is not aware to what extent schools are experiencing pressures and fallout from the social turmoil around them. The demands of teaching intensify as schools deal with issues related to inclusion, English as a second language (ESL) and multiculturalism, technological change, violence, poverty, economic restructuring, competitive educational environments, and new partnerships with business and parents. Yet despite educational and social pressures, Canada's international record on student participation rates and achievement levels remains very high.

When change is all around us and the role of schooling in society is constantly being debated, it is easy to lose sight of the things we do well. Teachers often report that one of the biggest causes of stress is the "unmet needs of students." For some of us, the overload and fragmentation we experience have sapped us of joy in our work. Yet we also know that we can and do make a difference in students' lives. We need to take time to concentrate on the successful elements of our work.

Schools, of course, cannot afford to be complacent. The challenge of preparing students for a future characterized by uncertainty requires a deep personal and collective commitment. But that effort can be energizing when we recognize our achievements and remember to celebrate—joyfully rewarding ourselves and others for making positive contributions.

Starting Points

- List the things that are going well in your work. Share some of your successes with colleagues and others.
- What aspects of your school or workplace give you a sense of pride? Acknowledge the good work of people around you with a thoughtful comment or note.
- Celebrate your successes and regularly reward yourself.

Process Tools

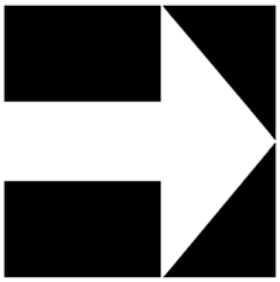
Celebrating Success Stories

Suggestions

1. Think of a scenario that illustrates a successful or satisfying moment in your recent educational experience. Respond to the following questions:
   - What scenario or story of success came to mind?
   - Why was this scenario especially satisfying for you?
   - What influence did your actions have in this situation?
   - How might you build more of these satisfying moments into your work life?
2. Record your story in a professional journal, or tell it to a colleague or friend.

See Process Tools: Blackline Masters, page 93.

3. Planning a Project



3.1 Consider the Process

Propositions

- Planning a project takes time and effort.
- Careful attention to each element of the planning process increases the chances for success.
- A project plan is a springboard for action that outlines
  - what we want to do
  - how we will do it
  - how we will assess and evaluate the results

Assumptions

" . . . implementation planning is itself a process of innovation. Planners, whether a teacher in a coaching project or a leader of a large-scale reform effort, have to combine expertise and knowledge about the direction and nature of the change they are pursuing, with an understanding of and an ability to deal with the factors and strategies inherent in the process of change."

M. Fullan, 1991, 98

Successful projects often begin with careful planning that helps to direct and focus our energy by considering the details of what we want to accomplish or investigate, how we will conduct our activities, and how we will assess their impact on ourselves and others.

A project, especially a challenging one, may involve an initial struggle to clarify purposes and narrow the focus so that our plans are realistic. This process takes time and effort but pays off in greater chances for satisfaction and success.

There are many action planning models. The one suggested in *Vision to Action* draws from the theory and practice of self-directed learning and identifies questions involved in effective planning and action (see section 3.5). Each question is like a problem-solving cue, encouraging us to become systematic and responsive to our own learning. The approach takes time to internalize but ultimately represents a way of taking charge of change through initiative and self-guided action.

Planning, of course, is just the beginning, a kind of map to guide our journey. As in all journeys, we may run into unexpected problems or opportunities along the way. Give yourself permission to alter the route if conditions change. As we learn more about our area of focus, for example, new insights may lead us to adapt or modify our initial plan.

A project approach to learning assumes that planning and action are co-evolutionary. As Fullan and Miles (1992) note, "The message is not the traditional 'plan, then do,' but 'do, then plan . . . and do and plan some more'" (749).

Starting Points

- Think about other times when you faced a challenge or undertook a significant project. Use what you know about your working style to inform your planning.
- Talk with colleagues and partners about areas of common interest. Explore possible topics for a collaborative project.
- Think about your personal working style. Identify whether you generally prefer to work toward a goal or explore a question when learning something new.

Process Tools

Analyzing the Planning Process

Sometimes we undertake a learning project without consciously planning ahead. Becoming aware of the stages of project planning can bring greater focus and clarity to our activities. Sometimes it is helpful to recall a project we have undertaken in the past, or one in which we are currently engaged.

Suggestions

Analyze the planning process you used for a previous or current project by reviewing what you did at each stage and noting what strategies worked well for you. Then you can use them again in future projects.

1. Select a focus for change.

2. Develop a vision.

3. Identify a goal or question for inquiry.

4. Create an action plan.

5. Establish support systems.

6. Anticipate challenges.

7. Prepare to learn from experience.

See Process Tools: Blackline Masters, page 94.

3.2 Select a Focus

Propositions

- Choosing a focus for a change project involves selecting one priority to which we will give our attention over an extended period.
- A clear focus helps us move ahead with the change process by giving us a starting point.
- Given the demands on our time, it is important that we focus on an area that is worthy of our best efforts.

Assumptions

We often feel bombarded with information about new curricula and programming. It is impossible to fulfill our day-to-day responsibilities and keep up with all the new ideas at once. But rather than drowning in the wave of change, we can ride it by grasping a promising innovation, studying it, and letting it carry us forward. Seeing the relationship of our change project to the bigger picture helps us to sustain our efforts over time.

"Whatever you can do, or dream you can, begin it. Boldness has genius, power and magic in it."

Goethe

We are more likely to engage in a change project if we can envision success. By narrowing our focus for change to a manageable area we begin to see possibilities for making progress. Having a focus helps us identify tools and strategies we already have and build on what we already know.

Ownership is a necessary part of change. We are more likely to get involved in a new learning experience if it is relevant to our interests, concerns, or questions. The people involved in a change project are the best ones to determine its focus, otherwise commitment will diminish as difficulties arise.

Starting Points

- Take time to identify and evaluate a number of possibilities before choosing the focus for your change project. Evaluate each option by asking yourself how important the focus is, whether success is likely, and whether the project seems manageable in your situation.
- Identify what is already in place in your school or workplace that supports the area you wish to focus on. Build on strengths.
- In a group project, make sure the focus allows for individual interests, abilities, and working styles.
- Keep a professional journal or use some other means to reflect on and summarize what you have learned.

Process Tools

Selecting a Focus for a Project

Suggestions

1. Begin by reflecting on your own.
   When I think about the changes that are happening in education:
   - What am I excited about?
   - What am I concerned about?
   - What questions do I have about how to deal with these changes in my current situation?
2. Then discuss with colleagues.
   - What interests do we share? What are our priority concerns?
   - What are our most important questions? Which ones are worth worrying about? Which are beyond our control?
   - What questions do we have in common that we could begin to answer through our own investigations?
3. Work with colleagues to summarize your ideas and decide on a focus.
   - What aspect of educational change is most important to work on at this time?
4. Will this be an individual or a group project?
   Choose a focus that addresses significant questions, provides ownership for all those who want to participate, and is feasible. Consider criteria such as
   - relative importance of the topic
   - people's comfort levels
   - potential impact of the project
   - access to information
   - community support
   - availability of resources

See Process Tools: Blackline Masters, page 95.

3.3 Develop a Vision

Propositions

- A vision for a project is a mental image of a situation as it might be if we could realize our ideals, hopes, and dreams. It reflects the values that make a project worthwhile.
- A vision statement may encompass a number of goals that suggest different paths of action.
- Visions change as learning occurs.

Assumptions

"The mind shapes the reality we experience by creating a vision of the life we desire. We set all our powers in motion to bring it about. That picture of the future becomes a self-fulfilling prophecy."

M. Gibbons and P. Norman 1983, 87

The purposes of developing a vision for a project are to create an image of what might be possible, to frame our goals or questions, and to inspire action. A vision may be broad in scope, encompassing all the foundational principles of a new curriculum or new programming, or it may be as specific as an image of students learning successfully using one particular strategy.

We can capture our vision for a project in a statement that describes our ideal scenario. The scenario should be set in context—whether it involves an individual student, a classroom, a school, a school division/district, or the larger education system. If our vision statement is clear, others will be able to picture our image of success and lend their support.

Vision-shaping activities are most successful if they are interactive. Everyone who participates in a project needs to share the vision for it. Creating and revisiting a vision contribute to a shared sense of direction. A vision, like the other elements of planning, may evolve as we implement our plan. The view from halfway up the mountain is different from the view at the bottom.

Starting Points

- Set a time frame for your change project—for example, "The best we can imagine one year from now is . . . ."
- Create a detailed description of your ideal scenario. Identify how the scenario is similar to and different from a present scenario. You may find it helpful to use starter phrases such as "A successful scenario looks like . . . ; sounds like . . . ; feels like . . . ."
- Develop a written vision statement and revisit it regularly during the project.
- Ensure that all project participants have opportunities to contribute to the vision.

Process Tools

Shaping a Vision (Continued)

Framework for Developing Details

A Successful Scenario		
looks like . . .	sounds like . . .	feels like . . .

Shaping a Vision

Questions to Consider

1. What is the best we can imagine (in X years or X months) as a result of undertaking this project?

2. In our vision of success,
   - students will . . .
   - parents will . . .
   - teachers will . . .
   - schools will . . .

3. If this project achieves excellence,
   - we will see . . .
   - we will hear . . .
   - we will feel . . .

4. What will be different as a result of this project? What will be the same?

Continued

See Process Tools: Blackline Masters, pages 96 and 97.

3.4 Identify a Goal or Question for Inquiry

Propositions

- Projects can be designed around either a goal with specific outcomes or a question for inquiry.
- Working toward short-term goals and/or questions for inquiry gives us a constructive sense of change.
- The choice between a goal or question depends on both the type of project and the working style(s) of the project designer(s).

Assumptions

Goals and questions for inquiry are more specific than a vision. They have a shorter time frame and provide the immediate direction for project planning. Without a clear sense of direction, we may procrastinate or fall into the trap of "change for the sake of change."

"A vision without a task is but a dream

A task without a vision is drudgery

A vision with a task is the hope of the world."

Church inscription, Sussex, England, 1730

Project planning can be guided by either a goal statement that describes what outcomes we expect in a given period of time, or a question that clearly indicates what we want to investigate. If we have a specific outcome in mind, we can frame a goal statement. If we are exploring possibilities or solving problems that do not have readily apparent outcomes, a challenging question is a more useful guide.

Whether we focus on a goal or a question is also a matter of personal orientation: some of us are most comfortable with a clear outcome in mind, while others prefer the freedom to explore without specific expectations. In a group project, all members may share the same vision but participants might identify different short-term goals or questions for investigation. In this case, each would develop a unique action plan to work toward the same vision.

By achieving meaningful goals or finding answers to our questions, we renew the energy needed to continue to pursue our vision.

Starting Points

- Identify a number of appropriate goals or questions for your project and then select one or two that are meaningful and challenging.
- Connect the goal or question to the vision. Ask, "How will this goal or question help us move toward our vision?"
- Identify a specific time frame to reach a goal or research a question. Specify, "Our goal for the next term is . . . ."
- Make sure the goal is realistic. Ask, "Can we meet this goal in the time we have set?"
- Try to anticipate what might happen if you reach a goal. Ask, "If we achieve this goal, what will be affected? What side effects might we encounter?"

Process Tools

Selecting a Goal or Question for Inquiry

Suggestions

1. Brainstorm possible goals or questions to investigate. Consider several possibilities.
2. Classify possible goals or questions. Cluster those that could be combined. Refine.
3. Evaluate possible goals or questions. Consider advantages and disadvantages of each.
4. Select a key goal or question and set the time frame (X weeks or X months) for pursuing it.
5. Check for commitment to pursuing a goal or question and reaffirm your choice.

Goals	Questions
• Is this goal clear? Can we visualize what it would be like to achieve it?	• Does this question take us beyond "yes" or "no" possibilities?
• Is this goal worthwhile? Does it take a major step toward realizing the vision? Does it challenge us to change?	• Are we clear about what we are trying to find out?
• Is this goal realistic? Can we meet it in the time we have set?	• Will answering this question help us move toward our vision?
• Are we committed to this goal? Do we really intend to achieve it?	• Do we have the courage to explore this question?

Journal Reflections of an Early Years Teacher

"I'm excited, on the verge of something, but my thinking still seems muddy! I've been amassing so many books, guides, and other resources, I'm overwhelmed. I feel like a new teacher starting fresh (has its good points!) with so much to read and learn. I am open to change and discovery—but there are so many things I want or need to work on. I will have to set some priorities, make some decisions. I feel confused. I think I need to do more reading and sorting of strategies and information that can work for me, start me on my journey. I could use peer support . . . ."

See Process Tools: Blackline Masters, page 98.

3.5 Design an Action Plan

Propositions

- An action plan is a summary of what we will do to achieve a goal or investigate a key question.
- Although we need to plan carefully, over-planning can be dangerous if it limits flexibility.
- An action plan can and should be refined as the project progresses.

Assumptions

"The message is not the traditional 'plan, then do,' but 'do, then plan . . . and do and plan some more.' Even the development of a shared vision that is central to reform is better thought of as a journey in which people's sense of purpose is identified, considered, and continuously shaped and reshaped."

M. Fullan and M. Miles, 1992, 749

An action plan is a map for a project. It provides an overview that guides us as we work toward the goal or investigate the key question for a project. An action plan should address three questions:

- What will we do?
- How will we do it?
- How will we assess and evaluate our results?

A project action plan may be developed by an individual, a small group, or a representative committee. In small projects ownership increases if everyone contributes to joint planning, but in large projects sub-groups may develop plans for specific areas. Although tasks may be delegated to an individual or small group, all participants need to retain ownership through a feedback process. If an individual is undertaking a project, the action plan might be presented to a support group that can clarify ambiguities and suggest alternatives.

We should expect to modify our action plans as we encounter unanticipated challenges or discover insights that lead to new directions. A frequent problem in action planning is setting targets that are unrealistic for the given time frame. Expectations may have to be adjusted accordingly.

Starting Points

- Look at the suggested formats for action planning on pages 99 to 102 and choose the one that suits your project.
- Once you have developed the action plan, check it for feasibility. Seek feedback from people who are effective planners.
- Communicate the plan to others who are interested or concerned. Seek support from people who will be affected by the plan.

Process Tools

Creating an Action Plan: Outcomes Orientation

Questions to Consider in Creating an Action Plan

What will we do?

- What results do we want to accomplish?
- How long will it take to get there?

How will we do it?

- What needs to be done? Who will do what?
- What are the time lines?
- What information is needed? Where do we find it?
- What resources are available?
- Who can provide expertise or assistance?
- What could go wrong? How can we avoid disaster?

How will we assess and evaluate our results?

- What information do we need to judge effectiveness?
- How will we celebrate success?

Questions to Consider in Checking a

- Is the goal too simple or too grand?
- Is our plan workable? Do we look fo
- Is there risk involved? Will it challe
- Have we created a clear picture of w

Creating an Action Plan: Inquiry Orientation

Questions to Consider in Creating an Action Plan

What will we do?

- What question do we want to investigate?
- How long might we need to study this?

How will we do it?

- Where will we start? What process will we follow?
- How will we manage our time?
- How will we gather information about this question? Where might we look?
- Who might be able to help us? How will we enlist their support?
- How will we handle unexpected discoveries?

How will we assess and evaluate our activities?

- How will we document and demonstrate what we learn?
- How will we recognize and represent learning?

Questions to Consider in Checking an Action Plan

- Is the question too simple or too grand? Is it genuinely important to us?
- Is our plan workable? Do we look forward to the activities?
- Is there risk involved? Will it challenge our ability and accomplishments?
- Have we created a clear picture of what success or learning will look like?

See Process Tools: Blackline Masters, pages 99 to 102.

3.6 Establish Support Systems

Propositions

- Support systems help us stick to our intentions.
- Many different kinds of support can contribute to the success of a project.
- The most powerful support often involves people: learning partners, colleagues, and mentors.

Assumptions

"We are, finally, all wanderers in search of knowledge."

L. L'Amour, 1989, 234

We may begin our projects with good intentions, but other matters of urgency are sure to intervene. Support systems, especially connections with colleagues, help us stay the course, particularly when we encounter difficulties. A support system is the combination of resources that help us implement our action plan, including materials, time, and space as well as human resources.

Current literature on change stresses the importance of human resources and emphasizes that professional and personal growth are vital elements of effective change. Relationships and a sense of community are central to the success of innovations. Learning teams, study groups, and small action research groups are especially worthwhile investments.

The nature of the project determines what resources need to be explored. Once we have set a goal and a plan begins to emerge, we can define more clearly what kinds of support might meet our needs. Until we need support for a specific purpose, we may not recognize what is at hand.

Starting Points

- Be open to finding support in as many places as possible.
- Distinguish between supports that are essential and those that are desirable but not necessary.
- Seek support for your project by networking with advocates who have access to resources. Be sure to include input from those whose support may be critical. Diversity of opinion can enhance understanding and strengthen the project by addressing different perspectives.
- Build a support group that can serve as the nucleus of your learning community.

Identifying Needs for Support

Use the following framework to identify the kinds of support you may need for your project. Refer to the

Curriculum Re

Human Resour

Advocates

Financial Supp

Climate

Identifying Needs for Support (Example)

Curriculum Resources

- **materials:** support documents, videotapes, professional books, manipulatives, web sites, and CD-ROMs
- **learning experiences:** events (e.g., conferences, workshops, and courses) that provide information or learning opportunities in the project's focus area
- **models:** exemplars of effective practices
- **fax networks:** information-exchange networks for educators
- **computerized telecommunications networks:** electronic mail and Internet

Human Resources

- **consultants:** individuals or groups who can contribute expertise, information, and consultation
- **mentors:** colleagues who can coach or provide models
- **collaborators:** people who might want to work with you toward your goal
- **critics:** people who can help you assess project activities realistically
- **moral supporters:** people to whom you can turn for encouragement and reassurance
- **strategic networks:** partnerships, twinned schools, community-school teams, and learning project groups
- **professional organizations:** international and national organizations, provincial and local curriculum associations, committees, and special interest groups

Advocates

- **educational partners:** people whose approval, support, or participation will increase the likelihood of success
- **champions:** people who can lend credibility or visibility to the project

Financial Support

- **grants:** special funding allocated for programming or curriculum initiatives
- **re-allocation of budget priorities:** commitment of existing funds to support projects
- **sponsorships:** contributions from interested parties such as local businesses

Climate

- **enthusiasm:** communication of interest and excitement
- **commitment:** visible examples of support for the project (e.g., attendance at project events)
- **permission to risk:** reassurance that fear and uncertainty are natural elements of change
- **valuing of approximations:** recognition of mistakes as valuable learning experiences
- **celebration of effort:** recognition of effort, growth, and accomplishment
- **trust:** belief that participants can and will succeed in effective educational change
- **constructive problem solving:** identifying and dealing with challenges as they arise
- **time:** for learning, planning, doing, interacting, reflecting, evaluating, and documenting

See Process Tools: Blackline Masters, page 103.

4. Making It Happen

4.1 Decide Where to Start

Propositions

- Getting started is often the hardest part of a project.
- A commitment to action affirms our openness to personal as well as educational change.
- Success is more likely if we choose a small first step, list the actions to take, and set a deadline for completion.

Assumptions

"An idea upon which attention is peculiarly concentrated is an idea which tends to realize itself."

C. Baudouin, in L. L'Amour, 1990, 73

Developing an action plan is only the first phase of a focused educational project. Change really begins when we alter our normal patterns of behaviour and thought. It takes great effort to think and act differently, especially when other tasks and priorities are also waiting for our attention. Without a commitment to action and a visible starting point, we may quickly be distracted from our intentions by the daily pressures of our work.

Finding time to put a plan into action can feel overwhelming unless we think in small, manageable steps. It helps to begin by naming and outlining one task that can be done in a short time, and listing it as a priority for immediate action. We can make our commitment even more visible by writing the task into a day-planner, or telling someone else what we intend to do and when we expect to complete it.

Starting Points

- Use a mini-contract to make tasks seem less daunting, especially in the early stages of a project. Some tasks lend themselves to mini-contracts that lay out a challenge to be completed by a given date. Others may be organized around an investigative question to be answered within a specific time frame.
- Make the time line for your first task very short—no longer than one week.
- Seek out others who believe in the worth of your project. Make arrangements to review the project with them regularly.

Process Tools

Making an Investigation Mini-Plan

Suggestions

1. Identify a task that has an observable result.
2. Decide whether the task should be guided by a challenge or a question.
3. Check whether the task is easily achievable and will provide a sense of accomplishment.
4. Write out the actions needed to complete the task in a mini-contract format.
5. Write the actions into your agenda or calendar.
6. Make a commitment to report back to someone else within a given time.

Making an Investigation Mini-Plan: Question of the Week

Project focus:

Question for inquiry:

Investigation plan:

Data-Gathering Strategies	Resources Needed

Making an Action Mini-Plan

Suggestions

1. Identify a task that has an observable result.
2. Decide whether the task should be guided by a challenge or a question.
3. Check whether the task is easily achievable and will provide a sense of accomplishment.
4. Write out the actions needed to complete the task in a mini-contract format.
5. Write the actions into your agenda or calendar.
6. Make a commitment to report back to someone else within a given time.

Making an Action Mini-Plan: Challenge of the Week

Project focus:

Challenge to be completed:

Action plan:

What	How	By Whom	By When	Done (✓)

See Process Tools: Blackline Masters, pages 104 and 105.

4.2 Set Priorities

Propositions

- Educators cannot move forward on all their commitments at the same time.
- We cannot expect to add new commitments without letting go of others.
- Worthwhile change usually takes more time than we expect.

Assumptions

"Put first things first . . . . To get 'leverage' on time, we should devote less attention to activities that are urgent but unimportant, more time to those things that are important but not necessarily urgent."

S. Covey, 1991

Most educators' lives are already filled to overflowing with commitments and pressures. If a new project is to be truly worthwhile, we must give it time and attention to flourish. This means adjusting or letting go of other priorities. It also means maintaining a realistic perspective on what tasks we can reasonably manage, given the other important commitments in our lives. Otherwise guilt can draw away our needed energies. Working effectively involves selecting one or two top priorities, giving them our best efforts, and trying not to worry about what we have to neglect for the time being.

Conscientious educators tend to set high ideals for themselves and others, and may also hope for unrealistic achievements during the early stages of a project. If our expectations are unrealistic, we invite feelings of failure and disappointment. Working effectively includes letting go of unrealistic short-term goals without losing sight of the long-term vision.

Starting Points

- Consider different kinds of time needed for your project:
  - learning time
  - planning time
  - interactive time
  - exploration time
  - reflective time

  Give yourself permission to take the necessary time or to adjust your expectations.
- Do not add anything to your list of priorities without taking something away.
- Select one or two top priorities for action and give them your best efforts.
- Set daily and weekly expectations that you can reasonably achieve within the time you have available.
- Do not expect to change too much at once.
- Take heart! Sometimes it is hard to let go of old behaviour patterns even though they may not serve us well.

Process Tools

Setting Priorities

Suggestions

1. List your present activities.
2. Code or categorize the activities:
   1 = urgent and important
   2 = not urgent but important
   3 = urgent but not important
   4 = not urgent and not important
3. Think about what might happen if you were to neglect some of the lowest priorities. Give yourself permission to let go of those that are least important.
4. Use the list to complete the priorities grid below. As you add new activities for your project, be sure to remove others from your list.

Higher Priority	Lower Priority
Do more of . . .	Do less of . . .
Add . . .	Subtract . . .

Reference: S. Covey, 1991.

See Process Tools: Blackline Masters, page 106.

4.3 Take a Risk

Propositions

- A worthwhile educational project demands the courage to risk uncertain consequences, and faith that the consequences can be handled.
- Strategic risk taking involves carefully analyzing the challenges involved and setting reasonable goals and expectations.
- Success in handling calculated risks leads to greater risk-taking capacity.

Assumptions

"Intuition is important. Often people know what to do but can't articulate why. They have an instinct, a feeling that they ought to do something or behave in a certain way. So also with change."

G. Binney and C. Williams, 1995, 49

As responsible educators, we all want to do our work well. We worry about making mistakes that might adversely affect students, or could be interpreted as poor performance. Taking the risk of trying something new can be uncomfortable and even frightening. We also risk failure, however, by clinging to educational practices that are ineffectual in today's circumstances.

Attempting new approaches involves trial and error. We are unlikely to "get it right" the first time through. In these situations, we can reduce the level of risk through thoughtful planning and reflection. Risk management involves carefully assessing a situation, designing a realistic approach that has the best chances for success, and observing what happens during the implementation.

Strategies for reducing risks include thinking ahead, visualizing possibilities, weighing alternative approaches, gathering suggestions from others, preparing for the most likely scenarios, making incremental changes, and taking time to analyze what actually happens. These strategies are supported by an attitude of inquiry that values calculated risk taking as essential to learning, and appreciates mistakes as learning opportunities.

Practice in calculated risk taking can increase our capacity to handle change. As we learn to trust our intuition based on planning and reflection, change becomes less formidable.

Starting Points

- Identify your fears about risks involved in your project. Confront your fears by talking about them with others. Imagine the worst that could happen if your fears came true, and then work to minimize the risks.
- Compare the risks of taking on the project with the consequences of maintaining the status quo.
- Practice asking yourself, "What did I learn?" rather than "How did I do?"
- Show yourself to be a risk taker. Share your learning with students or colleagues regularly.
- Describe one of your learning challenges to students. Invite them to help you analyze the risks.

Process Tools

Calculating the Risks

Suggestions

- List the risks involved in your project. Ask yourself why each risk concerns you.
- Design ways to minimize the risks. Use preventive approaches such as setting realistic expectations, informing others in advance, planning and organizing for action, using effective time management strategies, and rehearsing for new situations.

Questions to Consider

1. On a scale of 1 to 5, with 5 being the highest level of risk, how would you rate your project?

2. What factors make this project risky for you?

3. What risks might you be taking by not getting involved in the project?

4. What fears do you have about the risks involved in your project?

5. What would be the worst case scenario if your fears came true?

6. How might you reduce the risk of having this scenario occur?

See Process Tools: Blackline Masters, page 107.

4.4 Collaborate

Propositions

- Collaboration and shared ownership can enhance commitment to an educational project.
- When we collaborate, we gain access to more material, mental, and spiritual resources.
- New roles, procedures, and opportunities for interaction may be needed to support a collaborative educational project.

Assumptions

"To work collectively smarter is to remain in touch with those around us, both with their ideas and with their energy."

P. Vaill, 1989, 30

Educational projects require an investment of time and energy. Energy can be activated when people who have similar interests work together toward common purposes, even though they may have differing roles. Conversely, energy may be drained by resistance if individuals are coerced into participating. Time invested in identifying common purposes and interests early in a project will provide rewards later. Each participant should feel there is something to gain from working together.

Most people derive a sense of ownership through personal investment in a project. Ownership is fostered when we are encouraged to personalize ideas and practices in our own situations. Individuals may take different paths toward the same goal, yet benefit from regular interaction. When different approaches are shared, everyone gains a broader perspective.

Effective collaboration requires communication, teamwork, and negotiation skills, which we can develop through practice and constant attention. Common understanding and interpersonal support grow over time as we discuss experiences with each other and solve problems together. As collaboration develops, everyone gains greater access to the resources of the group.

Because participants bring differing needs and personal styles to a group, conflict is a natural part of collaboration. This can be viewed as either a problem or a resource. All individuals need opportunities to be heard and acknowledged, even if this means airing differences and "agreeing to disagree." Calling on an impartial group facilitator may be necessary when difficult situations arise.

Starting Points

- Seek support for your project from people who will be affected by it. Support is more likely if others are informed and involved from the beginning.
- Avoid power struggles by acknowledging the opinions and feelings of those who do not support your project. Involve those who are most interested, and do not insist on everyone's participation.
- Consider involving students, parents, community members, and others—especially those who may influence decisions such as allocation of resources.

Process Tools

Clarifying Expectations and Commitments

Suggestions

- During the initial stages of a collaborative project, take time to clarify participants' reasons for involvement and their expectations of one another. The questions below provide a framework for this discussion.
- When planning project activities, identify all the tasks to be done and make sure each one is built into your plan. Make sure that all participants are clear about what is to be done, by whom, and within what time period.
- Take time regularly to discuss how the group is working together and to air difficulties as they arise. During group meetings ask open-ended questions such as
  - "How do you feel about our work at this time?"
  - "Are there any issues we need to discuss before we move on?"

Questions to Consider

1. What do you hope to gain by participating in the collaborative project?

2. What do you see as the group's main purposes for working together?

3. What can you contribute that might help the group work together?

4. What do you need from other group members to make your participation worthwhile?

5. What suggestions do you have for making the group's collaboration as effective as possible?

See Process Tools: Blackline Masters, page 108.

4.5 Become an Action Researcher

Propositions

- Learning from events as they occur rather than striving for immediate, measurable outcomes is more likely to lead to effective, long-term change.
- Action research involves an ongoing cycle of focusing, planning, acting, observing, reflecting, and refocusing.
- Effective action research is based on an attitude of inquiry and a willingness to be flexible.

Assumptions

" . . . good inquirers know an important reality: that wallowing in correctness, being hell-bent for 'mastery,' stops learning. Messes are the fodder of creativity. Thinking through what is initially seen as an error makes new insights possible."

D. Watson, C. Burke, and J. Harste, 1989, 69

Action research is a learning process that involves gathering and examining information about our activities and their impact on ourselves, students, and others. Many effective professionals improve their practices through an ongoing cycle of focusing, planning, acting, observing, reflecting, and refocusing. When we bring this natural learning process to consciousness, we can use it strategically to deal with challenges of educational change.

An educational project is a natural opportunity for action research. As the project proceeds, we can gather information about what happens, reflect on problematic aspects of situations we experience, develop theories about how best to deal with these situations, plan strategic interventions, and test our theories in action. Others can assist by offering alternative interpretations, suggesting intervention strategies, and appreciating our learning.

We can enhance the action research process if we think of ourselves as learners rather than educational experts. An initial question for inquiry can help focus our attention and stimulate information gathering. New questions are likely to emerge, however, as we learn from experience.

Starting Points

- Give yourself permission to take an exploratory journey. You may have to adjust or even discard your action plan and time lines if you discover new and better opportunities for learning along the way.
- Think of unexpected obstacles and failures as learning opportunities. Focus on what you learned and how you might use the learning profitably in other situations.
- Keep in mind that models and strategies developed by others can be useful resources, but they can seldom be transposed directly from one context to another. What worked for someone else may not be suitable for your situation.
- Remember that significant change takes time, and do not expect visible changes immediately.

Process Tools

Learning from Experience

Suggestions

- Select a focus question to initiate your action research.
- Build time for observation and reflection into your action plan.
- Regularly engage in quiet reflection and self-evaluation, perhaps in a learning log or journal.
- Set up a simple system to collect examples of project experiences and personal learning. Include items such as photographs, audiotapes, videotapes, or student work samples.
- Integrate information gathering into your project. Avoid intrusive or disruptive approaches.
- Keep notes on critical incidents and how you deal with them. Look for patterns that may help you see what is working and what needs attention.
- Periodically review your collection and reread your journal to analyze what changes have occurred and what you are learning.
- Keep track of feelings as well as activities, insights, and new ideas. Feelings can provide clues to what needs our attention.

Questions to Consider

1. What are you hoping to learn over time from your educational project?
2. What are some questions you hope to explore through your project activities?
3. If you could answer just one burning question, which one might it be?
4. Where and how might you begin to seek possible answers to this question?
5. What methods might you use to gather useful information?
6. What strategies might you use to keep track of what you are learning as your project proceeds?
7. Who could provide pertinent and useful feedback about the impact of your project activities?
8. How might you gather this feedback?

See Process Tools: Blackline Masters, page 109.

4.6 Set up a Learning Community

Propositions

- In a learning community, everyone can be both a teacher and a learner.
- A learning community respects and values the different interests, needs, and learning styles of its members.
- A study group provides one structure for comparing project experiences and learning from one another.

Assumptions

"Working together is not just a way of building relationships and collective resolve. It is also a source of learning. It helps people to see problems as things to be solved, not as occasions for blame; to value the different and even dissident voices of more marginal members of the organization; and to sort out the wheat from the chaff of policy demands. Collaborative cultures turn individual learning into shared learning."

A. Hargreaves, 1995, 17

Forming a group interested in sharing learning experiences can help us overcome feelings of uncertainty and discouragement about educational change. According to Fullan (1997), "Change is learning, done under conditions of many real and/or perceived unknowns. In these circumstances prolonged isolation is bad, and interaction is essential" (13).

A study group that emphasizes the value of learning rather than performance or achievement can make educational projects more enjoyable for us. Study group meetings provide a venue for exchanging stories of critical events, challenges, struggles, and progress along the path of learning. We may individually describe strategies we have tried, display samples of student work, or refer others to resources we have found helpful. Everyone is encouraged to share discoveries.

In a study group, individuals may be working on similar or different aspects of the same educational project, or even on different projects. Approaches to learning may also differ. For example, while one person focuses on trying to implement a specific instructional strategy, another may be contemplating the implications of the underlying theory. An effective study group takes advantage of differences by appreciating individual learning styles and ensuring that all group members have opportunities both to speak and listen.

Starting Points

- Assess the part you play in supporting or limiting shared learning opportunities for yourself and others.
- Build time into your project plan for group activities where learning is valued.
- Refer colleagues to one another for ideas and resources.

Process Tools

Fostering a Powerful Learning Community

Questions to Consider

1. What factors in your educational environment encourage shared learning about educational change?

2. What factors in your educational environment discourage shared learning about educational change?

3. What might you do personally to encourage and support a learning community in your educational environment?

4. What might you do to bring others together to focus on learning?

5. What might you do to help make the learning in your educational community more visible and appreciated?

See Process Tools: Blackline Masters, page 110.

5. Tracking Progress

5.1 Anticipate Challenges

Propositions

- Challenges are inevitable in the course of a worthwhile educational project.
- Some problems can be avoided if we anticipate them.
- Problems also can be opportunities for learning and growth.

Assumptions

" . . . we cannot develop effective responses to complex situations unless we actively seek and confront real problems that are difficult to solve. Problems are our friends because only through immersing ourselves in problems can we come up with creative solutions."

M. Fullan and M. Miles, 1992, 750

The path of change is never smooth. In fact, the essence of project work is finding a navigable path through unfamiliar terrain. If we do not experience difficulties, we may not be making progress.

As project planners, we are seldom able to anticipate all the potential bumps and potholes that lie along the way. Most obstacles arise from factors that we could not have predicted. An action plan is better seen as a proposed route through a terrain than as a map to be followed without deviation. If we assume that an action plan is a guarantee of safe passage, we will quickly be disappointed and frustrated.

Sometimes challenges that appear daunting can be opportunities in disguise. If we look ahead frequently for problems in the making, we may turn them to advantage. Disasters can often be avoided if we anticipate problems and build in strategies to minimize the consequences.

Starting Points

- Before beginning your project, visualize each stage in as much detail as possible. Where details are fuzzy, be prepared for surprises.
- Build time into your plan for dealing with the unexpected. Beware of time lines that leave no room for problem solving or rethinking your approach.
- Include all preparations for action in your project time lines. Preliminary activities such as gathering background information, getting support from others, and preparing mentally for action to be undertaken all require time. Neglecting the necessary preparations can result in a shaky beginning to a project.

Process Tools

Anticipating Problems and Avoiding Disasters

Brainstorm a list of hazards you might encounter in your project. For each problem, identify some actions you could take to avoid or minimize the consequences.

Anticipated Problems	Possible Preventions

Anticipating Problems and Avoiding Disasters (Example)

Brainstorm a list of hazards you might encounter in your project. For each problem, identify some actions you could take to avoid or minimize the consequences.

Anticipated Problems	Possible Preventions
• uncertainty about where to start	• clearly specify the first step and target date
• procrastination	• set dates with support group to demonstrate progress
• feelings of confusion and lack of control	• accept that "messes are the fodder of creativity" (Watson, Burke, and Harste, 1989, 69)
• lack of resources	• include resource acquisition in the action plan
• lack of communication	• set up communication strategies in advance
• lack of support from key people	• discuss the action plan in advance with key people and invite their participation
• overload and time pressure	• do a task analysis of the action plan and set realistic time lines
• criticism from doubters	• establish a broad base of ownership in advance

See Process Tools: Blackline Masters, page 111.

5.2 Acknowledge Resistance

Propositions

- Resistance is a natural part of the educational change process.
- Some people need more time than others to assimilate new ideas and develop ownership for a project.
- Acknowledging and discussing feelings of resistance, doubt, and fear can enhance the climate for change.

Assumptions

"Helping ourselves and other people better manage the upsetting feelings of change is the healthiest thing we can do."

M. Fullan, 1997, 13

Doubt and resistance are natural and realistic emotional responses to change. They represent our caution when confronted by unpredictable situations over which we feel we have little control. Likewise, a sense of loss is natural when change occurs. People need opportunities to grieve over the past even as they begin to move on. During an educational project we may sense feelings of resistance or loss within ourselves, or recognize the emotional signs in others.

Suppressing or negating resistance can be counter-productive. Feelings of anger, sadness, frustration, anxiety, loss of control, dissatisfaction, and discomfort are emotions that indicate caring, and caring is a valuable resource. Resistance represents negative energy that, once acknowledged and understood, may be released toward positive change.

At each stage of an educational project, resistors need opportunities to contribute their perspectives. Resistance balances enthusiasm and idealism, and may provide a useful check against unrestrained exuberance. In the presence of empathy and understanding, resistors may choose to redirect their energies, or at least allow others to proceed once their concerns are understood.

Starting Points

- Discuss feelings associated with change. Provide opportunities for resistance to be expressed and acknowledged honestly.
- Allow resistance to surface by analyzing both benefits and challenges of proposed changes.
- Avoid confrontation over differing views of change. Seek to understand resistors' perspectives, and respect their rights to personal interpretations.
- Model empathy and acceptance. Establish a climate for change in which individuals can proceed at their own rates and in their own styles.

Process Tools

Analyzing Benefits and Challenges

Assess the benefits and challenges of your project. Consider its impact on yourself, others (e.g., students, colleagues, and parents), and the system in which you work. Use the chart below to represent a balanced perspective.

	Benefits	Challenges
Self		
Others		
Organizations		

Analyzing Benefits and Challenges (Example)

Assess the benefits and challenges of your project. Consider its impact on yourself, others (e.g., students, colleagues, and parents), and the system in which you work. Use the chart below to represent a balanced perspective.

	Benefits	Challenges
Self	• I will feel better if I start to work on one aspect of change. • I will be able to speak more confidently about this new curriculum.	• It will be hard to make time to work on this project. • It will be difficult not to fall back on familiar patterns, especially when I get really busy.
Others	• My students may learn more if I try some of the new instructional and assessment strategies that have been recommended.	• Parents will probably question me. What if I can't answer their questions?
Organizations	• Our school division will do better in provincial assessments if we use the new learning outcomes as a framework.	• The curriculum might be changed again.

See Process Tools: Blackline Masters, page 112.

5.3 Keep Track of the Journey

Propositions

- Significant learning often proceeds slowly, with occasional flashes of insight.
- Change is more apparent when we compare the present with the past.
- Progress becomes more visible when we collect examples of successes, challenges, and insights throughout a project.

Assumptions

"[Good learners] test their hunches about what really is going on, first in their own mind and then in reality. They try tentative solutions and check their success—and they are open to reformulating the problem if the evidence suggests they started out on the wrong path."

M. Csikszentmihalyi, 1996, 365

Educational change is complex and evolutionary. We cannot expect dramatic results in a short time, so it is important to keep track of small changes as they occur. The primary purposes of keeping track of the journey are to acknowledge and appreciate changes and to understand better how and why they occur. Changes are usually more visible when we can compare the present with the past, based on information gathered at different stages.

No single tracking approach can adequately capture the changing dynamics of an educational project. Progress becomes more apparent when we integrate a variety of information-gathering strategies naturally and regularly into project activities. Since we cannot always anticipate effective assessment opportunities, on-the-spot observation and recording are often useful.

Activities for individual and group reflection provide opportunities to acknowledge learning and celebrate progress. Regular reflective exercises that focus on successes, challenges, and insights help reveal progress and stimulate continued learning. A professional journal or learning log is one tool many educators use to monitor progress and track small changes in understanding and attitudes over time.

Starting Points

- Identify key questions about how your project may be affecting students, colleagues, parents, and others. Use the questions to guide your information-gathering activities.
- Consider using conferencing, interviews, student work samples, or questionnaires to gather feedback about how your project is affecting others.
- Treat emerging patterns as tentative. Use them to develop hypotheses or questions for further investigation, rather than drawing conclusions.
- Involve students, parents, and colleagues in tracking your project. Talk about what you are learning and seek their feedback. Use their responses as assessment data.

Process Tools

Gathering Evidence of Change

During your project, gather a variety of materials that illustrate your activities and show their impact on yourself, students, and others. Consider materials such as journal writing, work samples, audiotapes, videotapes, photographs, and other representations.

Strategies for Information Gathering		
Information to Collect	Data-Gathering Strategies	Time Line

Gathering Evidence of Change (Example)

During your project, gather a variety of materials that illustrate your activities and show their impact on yourself, students, and others. Consider materials such as journal writing, work samples, audiotapes, videotapes, photographs, and other representations.

Strategies for Information Gathering		
Information to Collect	Data-Gathering Strategies	Time Line
• Student work samples	• Student work portfolios will be used throughout the unit to gather samples of student learning.	• At the end of the unit I will help students select and compare two pieces of work that show their learning. Comparisons should show the impact of the project on student learning.

See Process Tools: Blackline Masters, page 113.

5.4 Appreciate Progress

Propositions

- Energy is renewed when we pause to celebrate individual and collective progress.
- Sharing learning with others can generate energy and increase confidence in the learning process.
- Individual stories of personal ownership and involvement can provide both inspiration and models of learning for others.

Assumptions

"The stories people tell have a way of taking care of them . . . . Sometimes a person needs a story more than food to stay alive. That is why we put these stories in each other's memory. This is how people care for themselves."

B. Lopez, 1990

Learning involves interaction between experiences and understanding. The process of constructing and reconstructing our understanding of experience is ongoing. There are always new questions to be explored and puzzles to be solved. Unless we pause periodically to appreciate how our thinking has changed, we may miss significant insights and turning points.

Through reflection we can appreciate and celebrate individual and collective progress. The appreciation of struggle and change validates our project experiences and renews energy for ongoing inquiry. Stories of learning, in many different forms, are a powerful tool for bringing important insights to consciousness.

When we share stories of learning with others, we encourage a collective appreciation for human development and the complexities of change. We can offer one another reassurance and inspiration by telling stories that reflect alternative perspectives on experience and models for action.

Starting Points

- Use a journal to write your own stories of learning.
- Encourage storytelling in your learning community by asking inviting questions.
- Organize a study group activity where all participants take turns stating what they learned during the past week, how they learned it, and how they plan to use the learning.

Process Tools

Recalling Stories of Learning

Stories of learning can help us see how our thinking has changed as a result of participating in and reflecting on project experiences. Frames for reflection, such as the one below, can be used again and again to remind us of stories of learning.

Frame for Reflection
I used to think . . .
Now I think . . .
I still wonder . . .
I used to think . . .
Now I think . . .
I still wonder . . .
I used to think . . .
Now I think . . .
I still wonder . . .

Recalling Stories of Learning (Example)

Stories of learning can help us see how our thinking has changed as a result of participating in and reflecting on project experiences. Frames for reflection, such as the one below, can be used again and again to remind us of stories of learning.

Frame for Reflection	
I used to think . . .	that I had to know everything about a topic before I could use any of it in my teaching.
Now I think . . .	that it's all right to bite off one small piece at a time to learn and use in the classroom.
I still wonder . . .	if I will ever feel as comfortable as I used to when I knew even less!
I used to think . . .	
Now I think . . .	
I still wonder . . .	
I used to think . . .	
Now I think . . .	
I still wonder . . .	

See Process Tools: Blackline Masters, page 114.

5.5 Evaluate the Project

Propositions

- We can increase support for educational projects by keeping others informed of progress and learning through regular evaluations.
- Effective evaluation focuses on both the educational impact of a project and the quality of participants' experiences.
- Evaluation may lead to new hypotheses and questions for further investigation.

Assumptions

"Our willingness to rely on truths created outside our experience has cost us the heart and soul of our profession, our belief in ourselves."

L. Neilsen, 1994

Evaluation of a project, whether formal or informal, should provide information that helps us answer questions about the project's impact on ourselves, others, and the educational environment. Decisions about what information to gather, how to analyze it, and how to present it to others depend on the project vision and goals or inquiry questions, the nature of our activities, and the evaluation purposes. Our assessment strategies should provide the best in-depth and contextualized information possible, with an emphasis on learning.

The first step in evaluation is to establish criteria that focus the evaluation on what we think is important. Criteria are statements about what we value or hope to show others. They should include what we think we are learning or have learned from the project. Once we have outlined the criteria, we can organize and present the best evidence possible to illustrate them.

Learning logs, professional journals, student work samples, and action research strategies provide some of the data we might review to evaluate our learning. We might also use questionnaires or interviews to gather feedback from students, parents, colleagues, or others about our activities.

A portfolio provides one format for demonstrating learning to others. It contains a carefully culled selection of material that illustrates what we have learned, as well as a reflective analysis that summarizes our learning process and evaluates its impact on our practice.

Starting Points

- When you are ready to compile a portfolio, critically evaluate the evidence you have gathered in relation to your project vision and goals or inquiry questions. Summarize important understanding and achievements, improvements in skills, changes in thinking, and areas that need further attention.
- Share your portfolio with others as a demonstration of learning and ongoing educational change.
- Use your self-evaluation and project evaluation as a basis for planning your next steps.

Process Tools

Demonstrating Learning to Others

Setting criteria for learning is one of the most challenging and important elements of evaluation. Criteria identify what we think is important. They help us and others know what to look for when reviewing information about a project.

Use a frame such as the following to develop criteria for learning and to decide what kind of evidence might best demonstrate the aspects of learning that you think are most important.

Frame for Dem	
Criteria for Learning	Evi

Demonstrating Learning to Others (Example)

Setting criteria for learning is one of the most challenging and important elements of evaluation. Criteria identify what we think is important. They help us and others know what to look for when reviewing information about a project.

Use a frame such as the following to develop criteria for learning and to decide what kind of evidence might best demonstrate the aspects of learning that you think are most important.

Frame for Demonstrating Learning		
Criteria for Learning	Evidence of Learning	Possible Examples
• I am learning to involve students in self-assessment of their writing.	• Students' writing portfolios	• Writing samples from lessons on setting and using criteria to evaluate descriptive writing. Students used three criteria to assess one piece of writing from their portfolios. Then they used the same criteria to set goals for improvement, and worked on rewriting the same piece. Samples show big improvements when criteria were applied the second time.

See Process Tools: Blackline Masters, page 115.

5.6 Refocus

Propositions

- Educational change projects seldom have a finite ending. Periodic reflection and refocusing renew our commitment and energy for continuous learning.
- Sustained involvement in a project approach to change increases our individual and collective capacity to deal with complex educational challenges.

Assumptions

"The real voyage of discovery consists not in seeking new landscapes but in having new eyes."

M. Proust, 1948

For thoughtful professionals, the learning journey never ends. Often discoveries made during an educational project raise new questions that beg to be pursued. The parameters of educational change can be made more finite by dividing a project into segments for review and replanning purposes. We heighten our sense of progress and accomplishment by pausing periodically to reflect and refocus. At these times, we can review and adjust project goals or questions and summarize learning.

Some people are uncomfortable with a lack of closure and seemingly infinite quest for knowledge, whereas others find the openness irresistible and invigorating. For those who need outcomes, chunking a project into segments and conducting regular reviews helps to sustain interest and commitment. As well, a regular review is reassuring for participants who are uncomfortable with taking large risks.

When an intense and worthwhile project does come to an end, some participants may feel a sense of loss and confusion. This is a good time to discuss ways to sustain the learning community and to focus on new learning opportunities. There are always more challenges of change to be addressed. Refreshing our vision and developing a new project plan keep the learning process alive and dynamic.

Starting Points

- List questions you have not been able to address during your project. Look for patterns that could help you refocus your learning.
- Throughout your project, keep an ongoing list of topics you may want to investigate later. As your project comes to a close, review the list and begin to design your next inquiry.
- Create a story map that details the learning journey you have taken so far. Then think forward into the next chapter of the story. Imagine what might happen and how the plot might unfold.

Process Tools

Reviewing and Renewing

Suggestions

Use the following framework to reveiw your project. Think about ways you might build on what you have learned so far.

1. What have I learned?

2. Why is this learning important to me?

3. How did I go about learning?

4. How could I use what I learned in the future?

5. What do I want or need to learn next?

See Process Tools: Blackline Masters, page 116.

Process Tools: Blackline Masters

The Big Picture

Human Dimensions of Change

Planning a Project

Making It Happen

Tracking Progress

Understanding Change

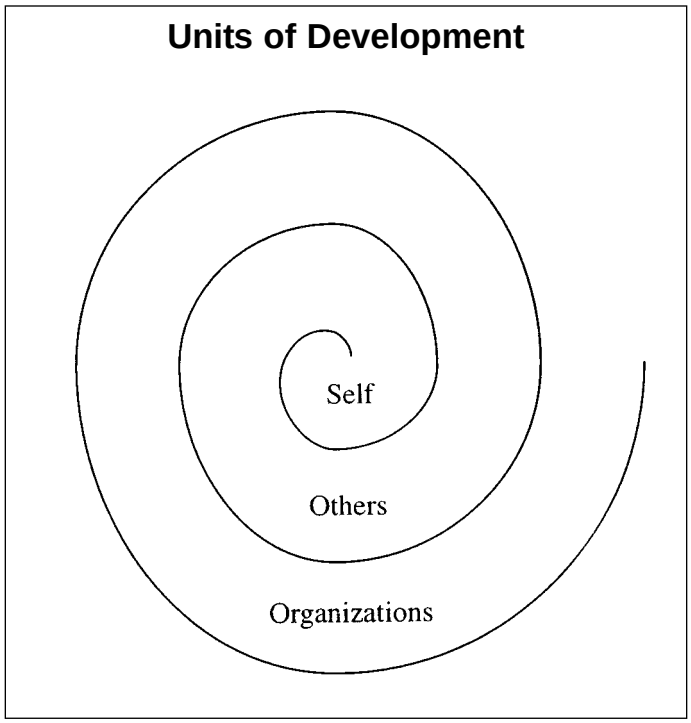
Questions to Consider

1. What recent changes in your community are mirrored in your school or workplace?

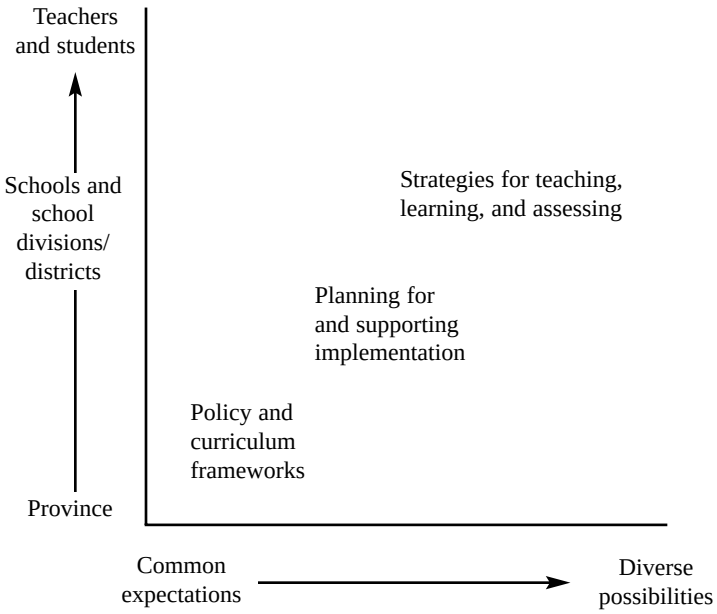
2. How have recent changes affected your local education system and the people involved—learners, educators, and the community?

3. What actions have you taken to respond creatively to these changes?

4. What actions could you take?



Analyzing Curricular Change



Questions to Consider

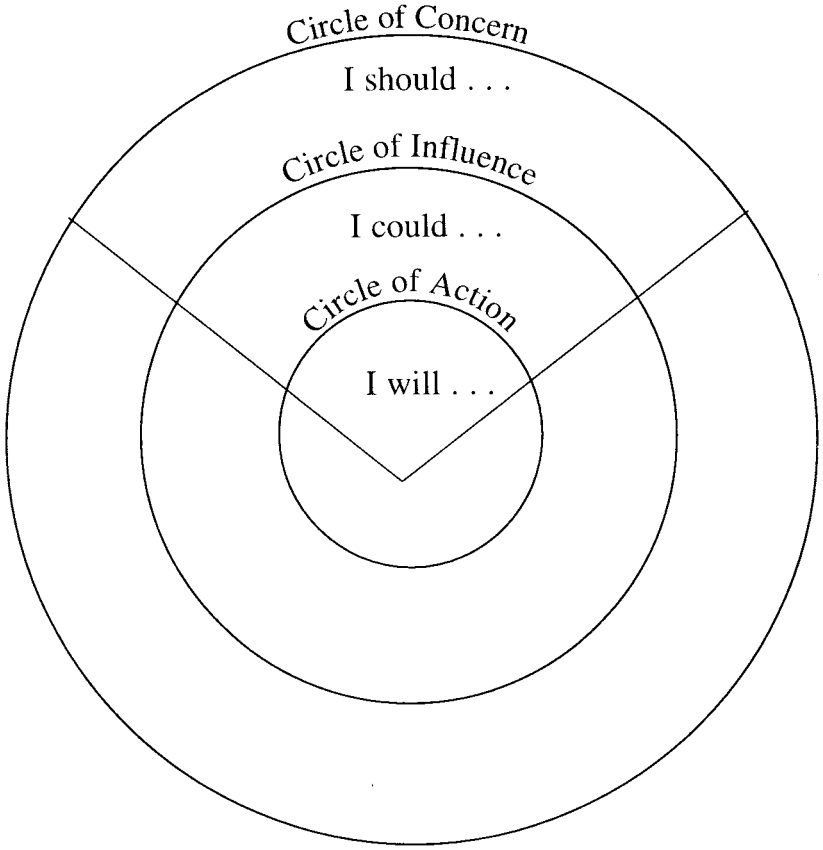
1. What does the above diagram suggest to you about the nature of curricular change?

2. In what ways does your educational community participate in implementing new curricula?

3. What activities might the local community undertake to shape appropriate curricula for your context?

Determining Your Circle of Influence

There is little point in worrying about things we cannot change. We can use our energies more effectively if we focus on a few areas where we are most likely to make a difference. Effective change agents identify and pay attention to areas they believe they can influence. Then they choose only one or two at a time as their priorities for strategic action.



Suggestions

1. List all your worries about educational change. Print each one on a self-stick note and place it in the **circle of concern.**
2. If you think you could take action to influence specific items in your circle of concern, move them into your **circle of influence.**
3. Choose one item from your circle of influence and put it in your **circle of action.** Decide how you might take constructive action on this item.

Understanding Learning Projects: Interview Activity

Talk to colleagues, students, or others about their self-directed learning projects.

Questions to Consider

1. Can you recall a powerful, self-planned learning activity you conducted within the last year?
2. Why did you undertake the activity?
3. What methods did you use?
4. What materials and resources were helpful to you?
5. In what ways did other people assist you?
6. What satisfaction did you derive from this activity?
7. What did this experience teach you about how to learn and be successful?

Interview Responses

Reference: A. Tough (1971).

Assessing Your Organization

Disciplines of a Learning Organization

- *Personal mastery:* Everyone in the organization is committed to ongoing self-directed and purposeful learning.
- *Mental models:* Individuals and groups in the organization examine their underlying assumptions and work to develop shared understanding.
- *Shared vision:* Activities of the organization are directed toward recognized ideals, purposes, and goals.
- *Team learning:* The organization supports communities of learners and practices synergy.
- *Systems thinking:* The organization is viewed as part of a larger system and all activities and events are seen as interrelated.

Reference: P. Senge (1991).

Suggestions

1. Evaluate your learning organization (e.g., department, school division/district, or school). Assess the degree to which your organization demonstrates the five disciplines listed above.

2. Identify individual and collective actions that could improve your capacity as a learning organization.

Developing a School Profile

Suggestions

Invite teachers, parents, students, and community members to help you create a school profile. Use the information they provide to set priorities for action and to initiate community dialogues about what is important to all participants. The following framework can be used to gather information or to structure small-group school-community discussions:

1. Phrases that describe our school:

2. Our educational strengths:

3. Areas that could be improved:

4. Hopes for the future:

5. Priorities for action:

Working with Mental Models

Suggestions

1. Identify a controversial issue arising from curricular change.

2. Write a position statement about the issue.

3. List arguments that support and arguments that challenge the position statement. Discuss the assumptions behind each argument. Explore similarities and differences between your mental models.

Arguments for . . .	Underlying assumptions . . .
Arguments against . . .	Underlying assumptions . . .

4. Identify areas of common belief and areas where you will “agree to disagree.”

Developing a Personal Learning Profile

Questions for Reflection

1. How would you describe yourself as a learner?

2. How have you managed major changes in the past? What strategies and skills did you learn from these experiences?

3. When you learn something new, how do you usually go about it?

4. What challenges you most when you are trying to learn something new? How do you usually deal with these challenges?

5. What conditions help you to learn most effectively? What factors are most important in your learning environment?

6. What is most likely to hinder your learning? How could these hindrances be avoided?

7. What learning characteristics do you value most?

Continued

Developing a Personal Learning Profile (Continued)

Self-Assessment of Learning Strategies

I am able to	beginning	developing	well-developed
• identify a learning goal or question for inquiry	_____	_____	_____
• make an action plan to guide learning	_____	_____	_____
• seek and locate relevant learning resources	_____	_____	_____
• organize and manage significant learning activities	_____	_____	_____
• assess personal learning characteristics and strategies realistically	_____	_____	_____
• accept challenges and take risks in learning	_____	_____	_____
• work collaboratively in a community of learners	_____	_____	_____
• monitor learning through critical reflection and self-evaluation	_____	_____	_____
• demonstrate my learning for others	_____	_____	_____

Understanding Orientations to Change

Outcomes Orientation	Inquiry Orientation
• set goals	• identify a question
• make a plan	• explore possibilities
• identify resources	• investigate resources
• manage change activities	• respond to experiences
• demonstrate results	• represent understanding
• evaluate outcomes	• reflect on learning

Questions to Consider

1. What are some of the benefits of an outcomes orientation toward change? What are some of the limitations?

2. What are some of the benefits of an inquiry orientation? What are some of the limitations?

3. Identify some of the changes you currently face. When might it be useful to focus on outcomes? When might you want to adopt an inquiry approach?

Dealing with Concerns

Suggestions

1. Identify a proposed change that affects you.

2. List your concerns about this change.

3. Classify the items on your list using the following categories:

1 = This is worth doing something about.
2 = We do not know what will happen until we try. Let's monitor the situation.
3 = We could change this, but it would take more effort than we want to invest.
4 = This is beyond our control. Let's not waste energy worrying about it at this time.

4. Prioritize the items classified under category 1, putting your most important concerns first.

5. Turn the highest priority concern into an action statement (e.g., "We will . . .," or "I will . . .").

6. Revisit the list of concerns regularly to see whether feelings and attitudes have changed.

Creating a Group Profile

Characteristics of a Learning Community

- Each individual is actively engaged in learning.
- The learning of each group member is visible to others.
- Learning is celebrated and enjoyed.
- Learning is sustained over time.
- Group members talk with one another about their practices.
- Group members share knowledge of their craft with one another.
- Group members observe one another's engagement in daily activities.
- Group members help one another become more skilful.
- Individuals in leadership positions engage in, display, and model learning.

Suggestions

1. Think about an educational group or community to which you belong (e.g., your classroom, a teacher learning-project group, a department, school staff, school division/district, curriculum committee, and parent-teacher group).

2. Analyze your group using the characteristics listed above.

3. Identify ways in which your group could further develop its effectiveness as a community of learners.

Celebrating Success Stories

Suggestions

1. Think of a scenario that illustrates a successful or satisfying moment in your recent educational experience. Respond to the following questions:
   - What scenario or story of success came to mind?
   - Why was this scenario especially satisfying for you?
   - What influence did your actions have in this situation?
   - How might you build more of these satisfying moments into your work life?
2. Record your story in a professional journal, or tell it to a colleague or friend.

Analyzing the Planning Process

Sometimes we undertake a learning project without consciously planning ahead. Becoming aware of the stages of project planning can bring greater focus and clarity to our activities. Sometimes it is helpful to recall a project we have undertaken in the past, or one in which we are currently engaged.

Suggestions

Analyze the planning process you used for a previous or current project by reviewing what you did at each stage and noting what strategies worked well for you. Then you can use them again in future projects.

1. Select a focus for change.

2. Develop a vision.

3. Identify a goal or question for inquiry.

4. Create an action plan.

5. Establish support systems.

6. Anticipate challenges.

7. Prepare to learn from experience.

Selecting a Focus for a Project

Suggestions

1. Begin by reflecting on your own.

   When I think about the changes that are happening in education:
   - What am I excited about?
   - What am I concerned about?
   - What questions do I have about how to deal with these changes in my current situation?

2. Then discuss with colleagues.
   - What interests do we share? What are our priority concerns?
   - What are our most important questions? Which ones are worth worrying about? Which are beyond our control?
   - What questions do we have in common that we could begin to answer through our own investigations?

3. Work with colleagues to summarize your ideas and decide on a focus.
   - What aspect of educational change is most important to work on at this time?

4. Will this be an individual or a group project?

   Choose a focus that addresses significant questions, provides ownership for all those who want to participate, and is feasible. Consider criteria such as
   - relative importance of the topic
   - people’s comfort levels
   - potential impact of the project
   - access to information
   - community support
   - availability of resources

Shaping a Vision

Questions to Consider

1. What is the best we can imagine (in X years or X months) as a result of undertaking this project?

2. In our vision of success,
   - students will . . .
   - parents will . . .
   - teachers will . . .
   - schools will . . .

3. If this project achieves excellence,
   - we will see . . .
   - we will hear . . .
   - we will feel . . .

4. What will be different as a result of this project? What will be the same?

Continued

Shaping a Vision (Continued)

Framework for Developing Details

A Successful Scenario		
looks like . . .	sounds like . . .	feels like . . .

Selecting a Goal or Question for Inquiry

Suggestions

1. Brainstorm possible goals or questions to investigate. Consider several possibilities.
2. Classify possible goals or questions. Cluster those that could be combined. Refine.
3. Evaluate possible goals or questions. Consider advantages and disadvantages of each.
4. Select a key goal or question and set the time frame (X weeks or X months) for pursuing it.
5. Check for commitment to pursuing a goal or question and reaffirm your choice.

Goals	Questions
• Is this goal clear? Can we visualize what it would be like to achieve it?	• Does this question take us beyond "yes" or "no" possibilities?
• Is this goal worthwhile? Does it take a major step toward realizing the vision? Does it challenge us to change?	• Are we clear about what we are trying to find out?
• Is this goal realistic? Can we meet it in the time we have set?	• Will answering this question help us move toward our vision?
• Are we committed to this goal? Do we really intend to achieve it?	• Do we have the courage to explore this question?

Creating an Action Plan: Outcomes Orientation

Questions to Consider in Creating an Action Plan

What will we do?

- What results do we want to accomplish?
- How long will it take to get there?

How will we do it?

- What needs to be done? Who will do what?
- What are the time lines?
- What information is needed? Where do we find it?
- What resources are available?
- Who can provide expertise or assistance?
- What could go wrong? How can we avoid disaster?

How will we assess and evaluate our results?

- What information do we need to judge effectiveness?
- How will we celebrate success?

Questions to Consider in Checking an Action Plan

- Is the goal too simple or too grand? Is it genuinely important to us?
- Is our plan workable? Do we look forward to the activities?
- Is there risk involved? Will it challenge our ability and accomplishments?
- Have we created a clear picture of what success or learning will look like?

Creating an Action Plan: Inquiry Orientation

Questions to Consider in Creating an Action Plan

What will we do?

- What question do we want to investigate?
- How long might we need to study this?

How will we do it?

- Where will we start? What process will we follow?
- How will we manage our time?
- How will we gather information about this question? Where might we look?
- Who might be able to help us? How will we enlist their support?
- How will we handle unexpected discoveries?

How will we assess and evaluate our activities?

- How will we document and demonstrate what we learn?
- How will we recognize and represent learning?

Questions to Consider in Checking an Action Plan

- Is the question too simple or too grand? Is it genuinely important to us?
- Is our plan workable? Do we look forward to the activities?
- Is there risk involved? Will it challenge our ability and accomplishments?
- Have we created a clear picture of what success or learning will look like?

Creating a Project/Action Research Plan

Name: Date:

Focus

What area or issue do you wish to explore?

Goal or Question

Identify a specific goal you want to achieve or formulate a question to be investigated.

Resources

List the materials, people, and activities that you can use to reach your goal or address your question.

Materials:

People:

Activities:

Support System: What additional strategies might support your project and help ensure success?

Continued

Creating a Project/Action Research Plan (Continued)

Plan

Outline the actions or inquiry methods you will take and include a time line to guide your progress.

What:

When:

Target completion date:

Results

Indicate how you will monitor your progress, what kind of feedback you might collect, and how you will evaluate the results.

Monitoring Strategies:

Feedback:

Criteria for Evaluation:

Celebration

What is the most appropriate way to celebrate your learning and the completion of this project?

Identifying Needs for Support

Use the following framework to identify the kinds of support you may need for your project. Refer to the list in section 3.6 to remind you of possibilities.

Curriculum Resources

Human Resources

Advocates

Financial Support

Climate

Making an Action Mini-Plan

Suggestions

1. Identify a task that has an observable result.
2. Decide whether the task should be guided by a challenge or a question.
3. Check whether the task is easily achievable and will provide a sense of accomplishment.
4. Write out the actions needed to complete the task in a mini-contract format.
5. Write the actions into your agenda or calendar.
6. Make a commitment to report back to someone else within a given time.

Making an Action Mini-Plan: Challenge of the Week

Project focus:

Challenge to be completed:

Action plan:

What	How	By Whom	By When	Done (✓)

Making an Investigation Mini-Plan

Suggestions

1. Identify a task that has an observable result.
2. Decide whether the task should be guided by a challenge or a question.
3. Check whether the task is easily achievable and will provide a sense of accomplishment.
4. Write out the actions needed to complete the task in a mini-contract format.
5. Write the actions into your agenda or calendar.
6. Make a commitment to report back to someone else within a given time.

Making an Investigation Mini-Plan: Question of the Week

Project focus:

Question for inquiry:

Investigation plan:

Data-Gathering Strategies	Resources Needed	Schedule	Done (✓)

Setting Priorities

Suggestions

1. List your present activities.
2. Code or categorize the activities:
   1 = urgent and important
   2 = not urgent but important
   3 = urgent but not important
   4 = not urgent and not important
3. Think about what might happen if you were to neglect some of the lowest priorities. Give yourself permission to let go of those that are least important.
4. Use the list to complete the priorities grid below. As you add new activities for your project, be sure to remove others from your list.

Higher Priority	Lower Priority
Do more of . . .	Do less of . . .
Add . . .	Subtract . . .

Reference: S. Covey, 1991.

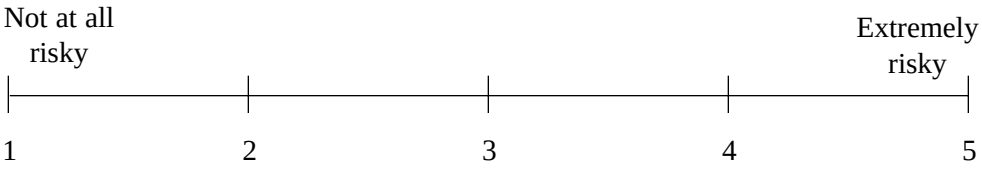
Calculating the Risks

Suggestions

- List the risks involved in your project. Ask yourself why each risk concerns you.
- Design ways to minimize the risks. Use preventive approaches such as setting realistic expectations, informing others in advance, planning and organizing for action, using effective time management strategies, and rehearsing for new situations.

Questions to Consider

1. On a scale of 1 to 5, with 5 being the highest level of risk, how would you rate your project?



2. What factors make this project risky for you?

3. What risks might you be taking by not getting involved in the project?

4. What fears do you have about the risks involved in your project?

5. What would be the worst case scenario if your fears came true?

6. How might you reduce the risk of having this scenario occur?

Clarifying Expectations and Commitments

Suggestions

- During the initial stages of a collaborative project, take time to clarify participants' reasons for involvement and their expectations of one another. The questions below provide a framework for this discussion.
- When planning project activities, identify all the tasks to be done and make sure each one is built into your plan. Make sure that all participants are clear about what is to be done, by whom, and within what time period.
- Take time regularly to discuss how the group is working together and to air difficulties as they arise. During group meetings ask open-ended questions such as
  - "How do you feel about our work at this time?"
  - "Are there any issues we need to discuss before we move on?"

Questions to Consider

1. What do you hope to gain by participating in the collaborative project?

2. What do you see as the group's main purposes for working together?

3. What can you contribute that might help the group work together?

4. What do you need from other group members to make your participation worthwhile?

5. What suggestions do you have for making the group's collaboration as effective as possible?

Learning from Experience

Suggestions

- Select a focus question to initiate your action research.
- Build time for observation and reflection into your action plan.
- Regularly engage in quiet reflection and self-evaluation, perhaps in a learning log or journal.
- Set up a simple system to collect examples of project experiences and personal learning. Include items such as photographs, audiotapes, videotapes, or student work samples.
- Integrate information gathering into your project. Avoid intrusive or disruptive approaches.
- Keep notes on critical incidents and how you deal with them. Look for patterns that may help you see what is working and what needs attention.
- Periodically review your collection and reread your journal to analyze what changes have occurred and what you are learning.
- Keep track of feelings as well as activities, insights, and new ideas. Feelings can provide clues to what needs our attention.

Questions to Consider

1. What are you hoping to learn over time from your educational project?

2. What are some questions you hope to explore through your project activities?

3. If you could answer just one burning question, which one might it be?

4. Where and how might you begin to seek possible answers to this question?

5. What methods might you use to gather useful information?

6. What strategies might you use to keep track of what you are learning as your project proceeds?

7. Who could provide pertinent and useful feedback about the impact of your project activities?

8. How might you gather this feedback?

Fostering a Powerful Learning Community

Questions to Consider

1. What factors in your educational environment encourage shared learning about educational change?

2. What factors in your educational environment discourage shared learning about educational change?

3. What might you do personally to encourage and support a learning community in your educational environment?

4. What might you do to bring others together to focus on learning?

5. What might you do to help make the learning in your educational community more visible and appreciated?

Anticipating Problems and Avoiding Disasters

Brainstorm a list of hazards you might encounter in your project. For each problem, identify some actions you could take to avoid or minimize the consequences.

Anticipated Problems	Possible Preventions

Analyzing Benefits and Challenges

Assess the benefits and challenges of your project. Consider its impact on yourself, others (e.g., students, colleagues, and parents), and the system in which you work. Use the chart below to represent a balanced perspective.

	Benefits	Challenges
Self		
Others		
Organizations		

Gathering Evidence of Change

During your project, gather a variety of materials that illustrate your activities and show their impact on yourself, students, and others. Consider materials such as journal writing, work samples, audiotapes, videotapes, photographs, and other representations.

Strategies for Information Gathering		
Information to Collect	Data-Gathering Strategies	Time Line

Recalling Stories of Learning

Stories of learning can help us see how our thinking has changed as a result of participating in and reflecting on project experiences. Frames for reflection, such as the one below, can be used again and again to remind us of stories of learning.

Frame for Reflection
I used to think . . . Now I think . . . I still wonder . . .
I used to think . . . Now I think . . . I still wonder . . .
I used to think . . . Now I think . . . I still wonder . . .

Demonstrating Learning to Others

Setting criteria for learning is one of the most challenging and important elements of evaluation. Criteria identify what we think is important. They help us and others know what to look for when reviewing information about a project.

Use a frame such as the following to develop criteria for learning and to decide what kind of evidence might best demonstrate the aspects of learning that you think are most important.

Frame for Demonstrating Learning		
Criteria for Learning	Evidence of Learning	Possible Examples

Reviewing and Renewing

Suggestions

Use the following framework to reveiw your project. Think about ways you might build on what you have learned so far.

1. What have I learned?

2. Why is this learning important to me?

3. How did I go about learning?

4. How could I use what I learned in the future?

5. What do I want or need to learn next?

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