TEACHERS AS DISSEMINATORS OF OBJECT-BASED LEARNING: CURRICULUM DEVELOPMENT FOR AN ART MUSEUM-BASED, INSERVICE PROGRAM

by

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A thesis submitted in conformity with the requirements for the degree of Master of Arts
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The subject of this study is The National Faculty - Morris Museum of Art Professional Development Initiative for Teachers. In this initiative teachers developed and implemented art object-based, interdisciplinary instructional strategies that utilized works of art from the museum’s permanent collection. Teachers were surveyed to ascertain their concerns about disseminating this instructional innovation to their peers. The Change Facilitators Stages of Concern questionnaire (Hall, et. al., 1991) was used. A group interview collected teachers’ perceptions about the skills required for the dissemination of the instructional innovation. Literature on the roles, characteristics, and required skills and knowledge of teacher leaders, professional development strategies for the development of teacher leadership, and trainer-of-trainer programs was reviewed. Based on this research, recommendations were made for the curriculum design of the initiative’s third year. Use of the trainer-of-trainer and peer coaching models were part of the formal recommendations.
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Chapter 1

Introduction

The National Faculty - Morris Museum of Art Professional Development Initiative is a three-year professional development program for fourth- through ninth-grade teachers. The purpose of this initiative, staged at the Morris Museum in Augusta, Georgia, is to improve student achievement through the use of object-based learning utilizing works in the museum's permanent collection of art. The primary objective of the initiative's third year is to develop the necessary leadership skills in teachers to enable them to become disseminators of art object-based, interdisciplinary instructional practices and resources in their schools and districts. The purpose of this study is to prepare a design for the third-year curriculum of this initiative.

1.1 RATIONALE FOR INQUIRY

Museums and Education

Throughout most of history, museums have primarily been places in which society collects, preserves and displays artifacts of cultural, artistic, historical, and scientific significance. During the nineteenth century, this role was fundamentally intertwined with the role of educating the public:

*The ideal museum was understood to be "the advanced school of self-instruction," and the place where teachers should "naturally go for assistance." Although many museums and galleries were unable to achieve this ideal, this was a firmly held view.* (Hooper-Greenhill, 1991, p.25).

The educational orientation of museums was increasingly questioned in the early twentieth century. During the 1920s a dichotomy emerged between the educational and curatorial roles of museums. Interest in artifacts changed from an educational and cultural perspective to one which valued objects solely for their inherent quality and rarity. As a result curators devoted all of their energies to their collections, thereby removing themselves from interaction with the public.
Despite this lessening of interest, education remained a vital component of museums during the twentieth century. The role of museum educator was created to work with visitors and school children. Classroom learning materials and guided tours were also developed in the early twentieth century (Hooper-Greenhill, 1991). In 1942 the American Association of Museums (AAM) appointed a Committee on Education to review the social and educational problems facing museums; the result was a booklet titled *The museum as a social instrument*. By 1960 seventy-nine percent of U.S. museums were reportedly offering some kind of organized educational program (Patterson, 1961). Societal changes during the 1960s encouraged museums to place even greater emphasis on education. As the public perceived museums to cater to the elite, museums were pushed to develop educational programs to meet the needs of learners and visitors from diverse cultural backgrounds (Lehman & Igoe, 1981; Stone, 1986).

In the 1980s and early 1990s, the AAM organized two task forces to assess museums' readiness for the future. The resultant reports, *Museums for a new century* (Commission on Museums for a New Century, 1984) and *Excellence and equity* (American Association of Museums, 1992), had major impact on the further development of museums.

In *Museums for a new century* the Commission concluded that museums had failed to realize their educational potential, and that in order to do so they needed to re-design their priorities and their organizational structures. Among the Commission's sixteen recommendations, the following items related to education: re-define museum/school partnerships, integrate museum education throughout the entire organization, integrate museum education into the school curriculum, end the dichotomy between curatorial and education departments, conduct research in museum learning, and create both local and national dialogues on museum/school partnerships.

In response to this report, the AAM assigned a task force of twenty-five individuals to "...recommend action to strengthen and expand the educational role of museums in today's world..." (AAM, 1992, p.3). After two and a half years, the task force published the report *Excellence and equity* which called for a new definition of museum education, one that placed
education "...as central to museum's public service...[and that is] clearly expressed in every museum's mission and pivotal to every museum's activities" (1992, p.3). With the release of this landmark policy report, education transformed from a peripheral museum function to its encompassing mission. Educational programs in museums across Canada, Great Britain, and the United States have since greatly expanded.

Hooper-Greenhill summarizes the current position of museums as they prepare for the twenty-first century:

In the past decade enormous changes have taken place in museums and galleries across the world. The thrust of the shift is clear--museums are changing from being static storehouses for artifacts into active learning environments for people....In addition to looking inward to their collections, museums are now looking outward towards their audiences; where in the past collections were researched, now audiences are also being researched...The older ideology of conservation must now share its directing role with the new ideology of collaboration. (Hooper-Greenhill, 1991, p. 1):

Nature of Museum Education

The nature of museum education is inextricably linked to object-based learning. In this approach the artifact itself is used as a springboard for learning about the cultural, social, political, and personal contexts of its creation (Jabbawy, 1989). In the museum "...objects and ideas are interwoven in an open process of communication that blends study and exploration, seeing and thinking and, in many instances, touching" (Commission on Museums for a New Century, 1984, p. 59). In summary object-based learning is a form of inquiry.

The educational theory of constructivism has strongly influenced the practice of object-based learning in recent years. The notion that knowledge is socially constructed and shaped by individuals' particular values and interests has challenged the once prevalent view that knowledge is objective and verifiable. Cultural objects found in museum collections can no longer be defined with a singular interpretation but with multiple interpretations conceived not only by museum staff but by every museum visitor. The museum object is now perceived as a site for multiple stories, meanings, and interpretations, with the visitor as an active player in their creation (Roberts, 1997).
Museums and Schools

Museum/school partnerships are one of the oldest and most successful aspects of museum education (Sheppard, 1993). These relationships, however, have also endured the friction, failure, and challenges associated with the bridging of two separate worlds (Commission on Museums for a New Century, 1984). Up until the 1990s most museum/school collaborations consisted of museums providing elementary schools with pre-designed museum visits and outreach materials that were tangential to the existing curricula. School teachers had little or no input into the design of the activities and museum educators had little insight into the school curriculum. As a result these collaborations were fraught with the conflict that comes from lack of understanding and communication.

Beginning in the 1980s, museums were challenged by the Commission on Museums for a New Century (1984) to increase their collaborative involvement with other museums, schools, and community organizations. The Commission argued that such partnerships would help museums ensure their financial survival by allowing them to increase their staff, expand their resources, build public support, and realize their educational roles. With regard to education, the Commission and subsequent researchers (Commission on Museums for a New Century, 1984; American Association of Museums, 1992) called for a new type of museum/school partnership which created programs that were integral components of school curricula rather than tangential enrichment activities. Instead of a single field trip, this approach requires a long-term collaboration in which museum educators and teachers co-design an integrated learning program involving outreach programs to the school, teacher training, student visits to the museum, et cetera. By the end of the 1990s, long-term, collaborative programs between museums and schools have begun to appear but have yet to gain wide-scale predominance.

Museums and Professional Development for Teachers

Concurrent with this growth in museum/school partnerships is an evolving recognition of the role that museums can play in the professional development of teachers. For instance, a
primary recommendation from the report *Teachers take charge of their learning: Transforming professional development for student success* (Renyi, 1996) encouraged teachers and school districts to "find common ground" by working with the community to provide high-quality professional development. Museums were amongst the resource institutions found in most communities that the report cited as valuable for ongoing teacher learning.

In a recent survey of 600 American art museums conducted by the National Center for Art Museum/School Collaborations (1996), 39% of these museums were offering some form of teacher inservice program. A publication produced by the U.S. Institute of Museum Services (Hirzy, 1996) documented the range of museum-school partnerships which had recently emerged. Several innovative museum inservice programs were documented, all of which were apparently designed with the direct participation of teachers and administrators, fostered a deepening of subject-matter knowledge, provided adequate time for inquiry and reflection, were directed toward teachers' intellectual development, and introduced museum or object-based teaching strategies.

1.2 PROJECT BACKGROUND and CONTEXT

A professional development initiative for teachers in the counties of Burke, Columbia, and Richmond in the state of Georgia and the county of Aiken in South Carolina in the United States was initiated in May 1998 through a collaborative effort by The National Faculty, a non-profit organization dedicated to the development of teachers, and the Morris Museum of Art. For more than 30 years, The National Faculty has worked to improve the quality of teaching in U.S. classrooms by bringing distinguished scholars and K-12 teachers together in intensive professional development experiences. These experiences, traditionally in the form of summer institutes and academic workshops conducted throughout the school year, involve collegial study in the humanities and sciences. The intent of these experiences is to enhance teachers' mastery of their subject areas and develop new teaching approaches. The Morris Museum of Art (MMA), a private, non-profit museum located in Augusta, Georgia, holds a distinctive collection of art of
the American South. It creates, displays, and lends exhibitions which explore Southern art and culture and conducts original research through its library and research facility, the Center for the Study of Southern Painting. Committed to education, the museum offers a broad range of educational services, including preservice and inservice teacher training, curriculum-based resources, and student programs that emphasize art as a focal point for interdisciplinary studies.

Currently in its second year of a three-year term, The National Faculty-Morris Museum of Art Professional Development Initiative engages twenty-four fourth- through ninth-grade teachers from the four county school districts in art object-based, interdisciplinary learning experiences. The goal of this initiative is to improve student achievement through the use of object-based learning utilizing regional works in the museum's permanent collection of art. Working directly with academic scholars and Morris Museum staff, teachers will:

1. acquire inquiry skills for the interdisciplinary study of works of art;
2. develop and utilize art object-based, interdisciplinary teaching strategies, instructional units, and resource materials that integrate and link the museum experience into the classroom; and
3. develop the necessary leadership skills to become disseminators of art object-based learning and resources in their school and districts.

Annual activities for the team of teachers have included a summer institute and three two-day academic sessions scheduled during the school year. Academic scholars, selected for their expertise in areas relevant to the teachers' needs and interests, and museum curators and educators participate as faculty in this professional development initiative. Scholars are recruited from local colleges and universities as well as drawn from The National Faculty's 1,000-member network. Teachers were recommended for this inservice program by school district administrators and principals. All teachers have at least three years teaching experience; beyond this similarity, the teachers are differentiated by subjects and grade levels taught, years of teaching experience, and many other factors.
Needs Assessment

This professional development initiative for teachers is coordinated by a partnership of two organizations that are external to the formal educational system. A particular challenge for program planners is to make and keep this curriculum relevant to the teachers and school districts. For this reason needs assessment is a central characteristic of the curriculum development process of this "teacher-driven" program. Needs assessment was initially conducted in January 1998 with the museum's pre-existing teacher advisory panel and an ad-hoc advisory group composed of local teachers, university faculty, and school district administrative staff in order to determine perceived needs in the education community and the potential of a museum-based project to meet those needs. The initiative's goal and objectives were then defined through needs assessment discussions held between the partnership staff and the school district administrators of Aiken, Burke, Columbia, and Richmond public school systems. After recruitment of participants, a needs assessment survey and a large group discussion were conducted with teachers in May 1998; this assessment was instrumental in the refinement of the initiative's objectives for the first-year program.

Needs assessment remains an important component of the curriculum development process, in part to ensure a continually relevant program but also to maintain regular communications with the initiative's primary stakeholders. Needs assessment interviews, surveys, and focus groups are utilized with a variety of program stakeholders, including program faculty (visiting scholars, museum staff), learners (teachers), employers (district administrators, principals), school districts' students, and funders (private foundations). This process is facilitated by the program planning team, which consists of the deputy director and curator of education of the Morris Museum of Art and The National Faculty's national program director. An important vehicle for this process is a four-member program advisory team, composed of teacher representatives from each school district. This team meets quarterly with the partnership's program officer to advise on the content and format of workshop sessions and to serve as a liaison between teacher participants in their counties and the program planning team.
This approach to curriculum development has led the Morris Museum and The National Faculty to describe the initiative as a "work-in-progress," as it is constantly evolving in response to the changing needs and expectations of the primary stakeholders.

As stated earlier, needs assessment played a critical role in determining the programmatic emphasis for year one of this initiative. In the first-year curriculum emphasis was placed on the acquisition of inquiry skills for the interdisciplinary study of works of art, on art object-based, interdisciplinary teaching strategies, and on the development of instructional units. By the end of the first year, teacher-participants indicated a strong interest in broadening their knowledge of the works of art in the museum's collection and connecting these works to their classroom curricula. Teachers also demonstrated a strong desire to create classroom resources that could be shared with colleagues within their schools and their districts. The second-year curriculum of this initiative was designed to meet these teacher expectations. A description of the second-year curriculum is provided under the heading of "Treatment" in Chapter 3.

Conceptual Framework

Huberman's open, collective cycle model of professional collaboration (1995) is employed as a conceptual framework for this professional development initiative. This model's emphasis on inquiry, collaboration, and networking is ideal for facilitation of reflective professional development. The inservice topic is explored through multiple perspectives (conceptual inputs, didactic leads, experience sharing), an approach consistent with Schon's emphasis on the reframing process inherent to reflection (Schon, 1983, as cited in Hannay, 1994; Schon, 1982). Following the receipt of conceptual inputs and the development of a beginning sense of community through experience sharing, purposeful inquiry begins in earnest. Individual action research escalates to collaborative strategies, including peer coaching, as trust and rapport is built within the group. As Kemmis (1987) convincingly argued and Louden (1992) illustrated, collaborative activities are a hallmark of successful critical reflection. The variety of delivery mechanisms implied in Huberman's model reflects the acknowledgment of the varied reflective...
interests (Weiss & Louden, 1989), pedagogical interests, personalities, and learning styles of teacher participants (Lasley, 1992); this awareness of individual context is critical for facilitating reflective professional development (Hannay, 1994).

1.3 PURPOSE OF THE STUDY and RESEARCH QUESTIONS

Based on the request of school district administrators for their teachers to share their newly acquired instructional practices with their colleagues and the stated desire of teacher-participants to develop classroom resources for distribution to their colleagues within their schools and districts, the third-year curriculum of this initiative will emphasize the dissemination of art object-based instructional strategies and resources. In order for teachers to act as disseminators of art object-based instructional practices and resources, they must assume the role of an informal leader or change facilitator within their schools and their districts. At the onset of this study, teacher concerns about these leadership tasks were unknown. An understanding of teacher concerns is crucial to the development and success of a relevant leadership curriculum for the third year of this professional development initiative.

It is the intent of this research study to prepare a curriculum design for the development of relevant leadership skills utilizing the same needs-based approach that has guided the program's development during the past two years. The following research questions will guide this study:

- What are the teachers' concerns about the leadership task of disseminating art object-based instructional practices and resources with colleagues in their schools and districts?
- What specific leadership skills will teachers require for this task?
- Based on the specific leadership skills required and teacher concerns, what themes should be included in the inservice curriculum?
1.4 METHODOLOGY

This study employed a case study design, using multiple methods of data collection and analysis. The case study is an appropriate approach for doing research which involves an empirical investigation of a particular population within its real-life context using multiple sources of information.

A review of descriptive and experimental literature explored various aspects of teacher leadership, including the peer assistance roles, entry characteristics, and required skills and knowledge of teacher leaders. This study also included a literature review and discussion of professional development strategies for the development of teacher leadership; as part of this study, the trainer-of-trainer professional development model, an approach that relies upon teacher leadership, was also explored. As part of the curriculum development process, a survey of teacher-participants sought to determine their concerns about the leadership tasks. The task of dissemination was analysed by a focus group of teacher-participants, producing a list of required leadership skills from the teachers' perspectives. Based on the literature review and study findings, recommendations for the third-year curriculum of The National Faculty - Morris Museum of Art Professional Development Initiative were prepared.

Data were collected during the period of August through November 1999; the survey of the teacher-participants was administered in October. This time period represents the first half of the initiative's second year program. Data analysis was conducted during the period of mid-October through December 1999. A summary of the study's results and a final curriculum design was prepared during January 2000, in preparation for curriculum implementation beginning in March 2000.

1.5 LIMITATIONS OF THE STUDY

This research study does not attempt to describe or assess the impact of The National Faculty - Morris Museum of Art Professional Development Initiative on teacher-participants or their students. Data were collected from teacher-participants. Other key stakeholders, including
principals and school district administrators, were not formally involved in the study. However, the investigator's discussions with principals and school district administrators provided a sense of what was feasible or appropriate to implement within their school district and, therefore, influenced the final recommendations set forth in Chapter 6. This study does not compare this professional development initiative to similar museum-based programs. However, the findings and recommendations of this study may assist educators in the curriculum development and design of other museum-based professional development programs for teachers.
Chapter 2  
Review of the Relevant Literature

The National Faculty - Morris Museum of Art Professional Development Initiative, which is the focus of this study, is a three-year professional development program for fourth- through ninth-grade teachers. The objective of the initiative's third year is to develop the necessary leadership skills in teachers to enable them to become disseminators of art object-based instructional practices and resources in their schools and districts. Literature and research about the development of teacher leadership are reviewed in this chapter. Specifically a review of both descriptive and experimental literature on the following topics was conducted:

- to provide research syntheses of peer assistance roles, entry characteristics, and required skills and knowledge of teacher leaders;
- to provide a research synthesis of professional development strategies for the development of teacher leadership; and
- to describe the trainer-of-trainer professional development model.

The sample of descriptive and experimental literature consulted was drawn primarily from the last twenty-five year period. Of note for this research project, this time period encompasses the rise of the contemporary education reform movement. The review was limited to the research questions posed and does not represent the totality of literature on any of the topics.

2.1 TEACHER LEADERSHIP AND EDUCATIONAL REFORM

At the end of the twentieth century, educational reform is viewed as dependent upon teacher leadership (Katzenmeyer & Moller, 1996). Yet leadership as practised by teachers is not a new phenomenon. Its existence in the classroom and its formal and informal practice within schools has long been recognized, as early as 1932 (e.g. Waller). Before the educational reform movement of the 1980s, teachers had assumed formal leadership roles in schools and districts in
union activities, as department and curriculum committee chairs (Gehrke, 1991), and as members of advisory and governing committees. With the exception of union or association leadership, these roles have usually existed at administrative prerogative within a traditionally hierarchical structure of decision making; the scope of responsibility was confined to the classroom rather than expanded to school-wide involvement (Stone, et. al., 1997). Such positions required minimal levels of collegial or collaborative involvement; little or no training was required. Often team leader or departmental chair positions were primarily clerical or managerial in nature. Sometimes leadership positions required teachers to move out of the classroom and into the office (Livingston, 1992), an action not usually desired by a teaching professional who is mostly motivated by their direct interaction with students (Katzenmeyer & Moller, 1996).

Increased concern with teacher leadership, viewed as a means of fostering necessary changes within schools, has been inextricably linked to the educational reform movement in the 1980s and 1990s. Reports such as A nation at risk: The imperative for educational reform (National Commission on Excellence in Education, 1983) in the United States equated the decline in educational standards to a decline in the quality of teachers. This report, and the series of reports that soon followed, spawned the first wave of educational reform in the form of policies which set "more rigorous academic standards for students and more recognition and higher standards for teachers" (Pipho, 1986, as cited in Passow, 1990). These standards were disseminated and enforced through legislation, regulation, and mandate (Passow, 1990). Initiatives emerged from this period that aimed to introduce uniformity and conformity through standardized curricula and stringent requirements for student performance, promotion, and graduation (Smylie and Denny, 1990). Performance-based compensation systems, such as merit pay, were also a key component of this "first wave" of the reform effort (Conley, 1990; Berry and Ginsburg, 1990). All these measures, in essence, substituted external authority for local autonomy and expertise (Smylie and Denny, 1990). Later reports accused these measures of having created a sense of powerlessness for teachers (McNeil, 1987 as cited in Passow, 1990).

Immediately following the institution of these "first wave" policies was the issuance of a
series of reports which placed the mechanisms for significant school improvement at the local or school level and recognized the value of direct teacher participation in change efforts (Stone, et. al., 1997). A report from the California Commission on the Teaching Profession (1985), for instance, stated that the desired improvements would require changes in teachers' attitudes and skills, in administrators' expertise, and in school organization and culture. This report noted that these changes required responsibility and action for educational reforms to shift to the local level (Passow, 1990). A nation prepared: Teachers for the 21st century (Carnegie, 1986), stated that without teacher support, "any reforms will be short lived," and the key to successful reform "lies in creating a new profession... of well-educated teachers prepared to assume new powers and responsibilities to redesign the schools for the future." This report called for the restructuring of schools to provide a professional environment, a restructuring of the nature of the teaching force, including a greater voice for teachers in running schools, a revision in the recruitment, education and induction of teachers, an increase in the market competitiveness of salaries and career opportunities, a correlation of incentives to school-wide performance, and the provision of the technology, services, and staff needed for teacher productivity (Passow, 1990). The report Tomorrow's teachers: A report of the Holmes Group (Holmes Group, 1986) advocated for, among other elements, the restructuring of the teaching profession to recognize differences in teachers' knowledge, skill and commitment, a stronger connection between schools and institutions of teacher education, and an organizational improvement of schools to make these environments better places for teachers to work and learn (Fullan, et. al., 1998). Together these documents constituted the so-called "second wave" of educational reform, calling for sweeping changes in existing educational policies in order to increase student achievement. This phase of the reform movement has had a powerful effect on education globally, having spread throughout the United States, Canada, Great Britain, Australia, New Zealand and Spain (Smylie, 1995).

An increased recognition of the complexity and dynamic nature of the local school environment was an essential underpinning of the "second wave" of educational reform. School districts and schools were envisioned as complex systems composed of interdependent parts,
changing and evolving together in response to demands coming both from within the system and from without. In this model traditional distinctions between teacher and administrator were blurred. Leadership was dispersed and connected to competence for needed tasks rather than to formal position. Independence and isolation were replaced by collaborative work. In this vision teachers were autonomous professionals, free to design curriculum and instruction in response to the unique needs and interests of their students within the community context (Fullan, 1999; Livingston, 1992; Murphy, 1995; Smylie and Denny, 1990). Principals conducted a "middle-up-down" management approach, integrating various sources of knowledge. As a result, students were enabled to construct their own knowledge, "become problem-solvers, work in diverse groups, and otherwise prepare themselves for a lifetime of proactive citizenship in a complex world" (Fullan, 1999, p.81).

This new vision of schools demanded fundamental changes in the working relationships between students and teachers and between teachers and principals. Greater emphasis was placed on sharing power and decision-making rather than relying upon the traditional hierarchical structure (Murphy, 1995). This movement was supported by the writings of contemporary management theorists, such as Sergiovanni, who recognized that shared power, achieved through facilitative techniques, strengthens an organization and may make formal leadership positions redundant (Conley & Goldman, 1994). Facilitative leadership, defined by Dunlap and Goldman as the behaviours that enhance the collective ability of a school to adapt, solve problems, and improve performance (1991, as cited in Conley & Goldman, 1994), became an emerging style of principal leadership during the second wave of the educational reform movement (Conley & Goldman, 1994). The principal, no longer the instructional leader, now assumed the role of the leader of instructional leaders (Glickman, 1989, as cited in Conley & Goldman, 1994). These changes in the school environment were necessary prerequisites to the emergence of teacher leadership during this period of contemporary educational reform.
2.2 ROLES OF THE TEACHER LEADER

Katzenmeyer and Moller (1996) defined teacher leaders as those teachers who lead within and beyond the classroom, influence others toward improved educational practice, and identify with and contribute to a community of teacher leaders. This broad definition acknowledges the variety of roles that a teacher leader can assume in today’s school. The report *Teachers leading the way: Voices from the National Teacher Forum* (Paulu, 1998), for instance, identified fourteen formal and informal leadership roles that a teacher can assume. Researchers (e.g. Berry & Ginsburg, 1990; Crowther, 1997; Devaney, 1987; Lieberman, et. al., 1988; Smylie & Denny, 1990; Smylie & Brownlee-Conyers, 1992; Stone, et. al., 1997) have documented the experiences of teacher leaders and struggled to define their ambiguous role. In this section selected teacher leadership roles that are relevant to this study will be discussed.

A fundamental role of the teacher leader is to improve their own teaching ability, thus facilitating greater student learning (Devaney, 1987; Gehrke, 1991; Little, 1988; Rogus, 1988; Wasley, 1992). Teacher leaders are characterized by Rogus (1988) as self-directed learners who continuously work to expand their understanding of their profession and their environment. The self-directed, life-long learner is an important role for the teacher leader, particularly since this person establishes a professional model for other teachers (Lieberman, et. al., 1988). The “subjects” of the teacher leader’s learning are diverse and encompass all aspects of the teaching profession in addition to subject matter knowledge. Fullan’s framework for teacher learning suggests the potential breadth of this learning (1995). His framework for teacher learning embraces six interrelated domains of knowledge: teaching and learning, collegiality (skills linked to creating collaborative work cultures), continuous learning, change process, moral purpose, and content expertise. Notably the category of content expertise does not only reflect an acuity with subject matter. Fullan’s content expertise encompasses specific knowledge, understanding, and skills needed for relating to and taking into account parents, communities, business and social agencies, and specific strategies for teaching for cultural diversity as well as partnering with
other institutions. Fullan’s framework for teacher learning suggests a broad sphere of continuous learning for the teacher leader.

Teacher leaders also can play an important role in providing ongoing assistance to their peers through various approaches (Lieberman, et. al., 1988). These approaches include the organization of relevant in-service education (Berry & Ginsburg, 1990; Devaney, 1987; Johnston, et. al., 1990; Lieberman, et. al., 1988; Little, 1988; Smylie & Denny, 1990), mentoring, coaching or consultation (Berry & Ginsburg, 1990; Gehrke, 1988; Howey, 1988; Joyce & Showers, 1982; Little, 1988; Mertens & Yager, 1988; Rogus, 1988; Smylie & Denny, 1990; Stone, et. al., 1997; Strodl, 1992), peer evaluation (Berry & Ginsburg, 1990; Devaney, 1987), and simply serving as “willing listeners” (Katzenmeyer & Moller, 1996, p.17). Although peer evaluation is often referred to as the hallmark of a professionalized occupation (Little, 1988), it should be noted that there is not widespread support for peer evaluation. Several researchers have voiced the concern of teachers and administrators that teacher leaders should not play a role in the summative evaluation of their peers, since their success depends on retaining the trust of these colleagues (Berry & Ginsberg, 1990).

Collegial collaboration is a contemporary maturation of the concept of peer assistance. Fullan, Galluzzo, Morris, and Watson (1998), in their description of the future of teacher education, described professional learning communities as critical to the success of reform because "they created opportunities for teachers to collaborate and help one another achieve the purpose" (p.56). This concept runs counter to Lortie's description of the social, intellectual and professional isolation of teachers, a pattern which according to Goodlad (1990, as cited in Fullan, et. al., 1998, p.3) had often been established in preservice education.

Despite concurrence on the general nature of a teacher leader’s role, the literature review did reveal several areas of ambiguity. Yoder (1994), for instance, identified a “tension” in the literature between “positional” and “emergent” leadership roles for teachers. Positional roles are formal leadership roles created by the school or district administration. These roles are well documented in the literature through studies of formal leadership programs, such as lead
master teacher programs, career ladders, principal advisory committees, and other structures established by administrators. Emergent roles, on the other hand, arise without administrative sanction and are dependent upon individual initiative. This type of leadership role has not been well documented. Crowther (1997) stated that in the past emergent roles were often not recognized because leadership in Western culture is often synonymous with individuals possessed of formal power and authority. He argued that classroom teachers, without the benefit of formal positions, can become leaders. Lieberman (1992) concluded that emergent leadership roles may be far more powerful in changing the way teachers lead than positional roles. Her conclusion is based on the observation that teachers in emergent roles have the power to fundamentally change the culture of a school since they become integral to the changes taking place. Support of emergent leadership roles for teachers is shared by other researchers including Barth (1988), Whitaker (1995), and by advocates of facilitative leadership.

Linked to this ambiguity about positional and emergent roles is the tension between hierarchical and peer roles. The topic of career ladders has provided a touch point within the body of literature on teacher leadership in regards to this polarity. The development of career ladders and other hierarchical incentive plans was prompted during the first wave of the educational reform movement to diminish the "careerlessness" of teaching (Sykes, 1983, as cited in Little, 1988). Such plans typically present options for teacher leadership as possible steps in an individual career. Over time some teachers will advance to more senior positions based upon their demonstrated knowledge, skills, and commitment. Their new positions will be recognized by distinctive titles, increased access to resources, and expanded responsibility and authority. As the number of positions for advancement would be limited, teachers would be required to compete for them (Little, 1988).

Peer roles, concomitant with the belief that all teachers can be leaders, are consistent with the concept of a horizontal division of labour in the teaching profession (Howey, 1988; Mertens & Yarger, 1988). This concept is consistent with the social norm of equality in the teaching profession (Hart, 1994; Lortie, 1975, as cited in Hart & Bredeson, 1996). Indeed, several
researchers have reported that promotion and advancement are not necessarily an important component of a teacher’s vision of a successful career. Yee’s study (1986, as cited in Little, 1988) revealed that teachers appeared to be less interested in hierarchically arrayed positions than in a richer pool of professional opportunities for all classroom teachers. The 1990 study by Smylie and Denny reinforced this finding with their descriptions of teacher criticisms of formal leadership roles. Teachers criticized the appointment of teacher leaders, noting that this act created status differences and undermined professional equality and working relationships.

The tension between instructional and governance issues roles is also pervasive in the literature on teacher leadership. Teachers and researchers both assert that teachers, in both positional and emergent roles, gain legitimacy as leaders by remaining in touch with life in the classroom (Devaney, 1987; Howey, 1988; Katzenmeyer & Moller, 1996; Little, 1988; Rogus, 1988; Wasley, 1992). Formal leadership programs often demand that teachers retain a partial teaching load or work partially in the classroom in some capacity. The California Mentor Teacher Program (Little, 1988), for instance, required mentors to teach at least a 60% load. Programs studied by Kent (1985, as cited in Little, 1988) that released teachers full-time to work as mentors, promoted demonstration lessons and other classroom consultation as one means of retaining an instructional role and thus maintaining legitimacy as teacher leaders. Despite measures taken to ensure the teacher-leader’s presence in the classroom, critiques of teacher leadership roles emerge from the belief that a teacher’s prime concern is the facilitation of student learning. Any release time from the classroom for “administrative” duties, even if those duties are associated with peer mentoring or other school improvement activities, is viewed as counterproductive to that primary concern (Smylie & Denny, 1990). This seemingly unresolvable issue is grounded in the organizational structure of most schools, which usually limits time and access for all teachers to explore in-school collaboration.

2.3 ENTRY CHARACTERISTICS OF TEACHER LEADERS

In order to isolate the skills and knowledge which could become components of a teacher
leadership program curriculum, it is necessary to define the characteristics of teachers entering a leadership position. Several researchers have documented these characteristics in various studies since the beginning of the educational reform movement.

In terms of formal preparation and teaching experience, many researchers have noted that teachers entering a leadership position have more teaching experience and more formal education than the average teacher (Brownlee, 1979; Lieberman, et. al., 1988; Troen & Boles, 1994; Wasley, 1991; Stone, et. al., 1997). Many of the teacher leaders involved in the study by Lieberman, Saxl and Miles (1988) had a breadth of teaching experiences which included teaching children as well as adults. The teacher leaders in their study also had some previous experience in curriculum development and an advanced knowledge of the local context for teaching.

The possession of strong interpersonal skills, a necessity for developing trust and rapport with others, has been reported by several researchers as a common characteristic of teachers entering leadership positions (Berry & Ginsburg, 1990; Crowther, 1997; Lieberman, et. al., 1988). Additionally new teacher leaders are often articulate communicators (Crowther, 1997). These skills are useful in building networks of support within, and often beyond the confines of, the school community (Crowther, 1997; Smylie & Denny, 1990).

Researchers also noted that novice teacher leaders were distinguished by a willingness to take risks, especially to promote new ideas that might seem difficult or threatening to their peers (Lieberman, et. al., 1988). Crowther (1997) supported this entry characteristic through his comment that the teacher leaders in his study regularly confronted structural barriers in their schools and communities with confidence. This risk-taking reflects the teachers’ comfort with initiating change, a favourable characteristic for a school ‘change agent’ to possess.

Although teachers may have some previous experience in collaboration (Lieberman, et. al., 1988), most studies indicate that teachers entering leadership positions possess an insufficient level and breadth of skills in this area. For instance Fay, in her study of five teacher leaders (1992), iterated their concern for specialized skills training for collaborative restructuring,
specifically group dynamics, consensus building, conflict resolution, and communication with school publics. Little in Fay's teachers' pre-service or continuing education had acquainted them with the collaborative skills for leadership. Similar findings are stated in Kilcher's study (1992) of the first-year experience of five teachers who provided leadership as change facilitators in a Canadian school improvement project. These teachers identified facilitation, role negotiation, presentation, group process, and conflict resolution skills as important learnings during their first-year experience as teacher leaders.

Research is limited in the area of motivation. Some studies indicated, however, that most teachers are motivated to assume a leadership position because of a desire to improve the school, the district, or both (Smylie, 1995; Stone, et. al., 1997). Of these the strongest motivation may be the desire to improve the learning of students, as Wasley's study of teacher leaders indicated (1992). Many are dissatisfied with current school or district conditions or curriculum (Trachtman, 1991; Troen & Boles, 1994). Others are motivated by a desire to assist colleagues, or to grow personally or professionally (Barth, 1988; Stone, et. al., 1997; Troen & Boles, 1994; Wasley, 1991).

2.4 PROFESSIONAL DEVELOPMENT and TEACHER LEADERSHIP

Katzenmeyer and Moller (1996) suggested that teacher leadership depends on meaningful professional development. A recent review by the Centre for Educational Research and Innovation (CERI) employed the concept of "professional development" to signify a broader set of activities than "inservice education and training" (1998). Organized education and training activities constitute only one form of professional development. In schools that have become learning organizations, professional development may take place informally with and through colleagues. CERI described the evolution from individual to whole school development as a "paradigm shift" in professional development (CERI, 1998, p.30).

This emphasis on whole school development clearly links the paradigm shift in professional development to educational reform. Sparks and Hirsch summarized the major shifts
in professional development in a 1997 publication:

- from individual development to individual and organizational development;
- from isolated improvement efforts to development driven by a coherent strategic plan for the school district, each school, and the departments that serve schools;
- from district-focused to school-focused approaches;
- from a focus on teacher needs and satisfaction to a focus on student needs and learning outcomes;
- from training conducted away from the job as the primary delivery system for staff development to multiple forms of job-embedded learning;
- from the transmission of knowledge and skills by "experts" to the study by teachers of teaching and learning processes;
- from a focus on generic instructional skills to a combination of generic and content-specific skills;
- from staff developers who function primarily as trainers to those who provide training, consultation, planning, and facilitation services;
- from staff development provided by one or two departments to staff development as a major responsibility performed by all administrators and teacher leaders;
- from staff development directed towards teachers as the primary recipients to continuous improvements in performance for everyone who affects student learning;
- from staff development as a "frill" to an indispensable process.

Joyce and Showers (1982, 1995) reviewed the extensive literature on professional development and identified the five major components of training: presentation of theory, modeling and demonstrations, practice in the workshop setting or under simulated conditions, structured feedback, and coaching for classroom application. When used together each component has greater impact than when used alone (Joyce, et. al., 1999). There are a multitude of professional development strategies, adapted to specific contexts, that staff developers may use in this program cycle (Guskey, 1995). Networks, collaborative action research, mentoring,
study groups, cadres, and peer coaching are all strategies that may be selected to meet the needs and concerns of the participants.

2.5 INSERVICE TRAINING FOR TEACHER LEADERSHIP

While the preservice teachers of today and tomorrow will benefit from the inclusion of leadership training in their teacher education (e.g. Anderson, et. al., 1998; Forster, 1997), many practising teachers have received little or no preparation to assume leadership roles in schools. Likewise, many schools are not organized to provide teacher leaders with the time and space to reflect, plan, and take action (Berry & Ginsburg, 1990).

Studies of first-year teacher leaders have documented the demands on these individuals to develop new skills and abilities and gain new knowledge for these positions (e.g. Kilcher, 1992; Lieberman, et. al., 1988). Wasley (1992) and others have recommended that a formal effort be made to design professional development programs for practising and aspiring teacher leaders, based on their needs and the needs of faculties in schools attempting to restructure. These writings have provided inspiration and guidance for the establishment of in-service programs designed to nurture teachers as leaders. A literature review organized according to the selected roles of a teacher leader described earlier will identify the skills and knowledge required of the teacher leader. It will also describe in-service programs which have been organized or proposed to provide these skills and knowledge.

As stated earlier a fundamental role of the teacher leader is to improve their own teaching ability, thus facilitating greater student learning. As also discussed earlier, there are several domains of knowledge and skills related to this essential leadership role. Expertise in teaching content, including extensive subject matter knowledge, and instructional methodologies form a critical base for teacher leaders. Fullan (1995) argued for the development of teaching and learning strategies as well as content expertise in his comprehensive framework of leadership development for all teachers. He also asserted that leadership development for teachers entails continuous learning. Rogus (1988) also emphasized the need for the teacher leader to be a model
In order to nurture the teacher leader as a model learner, the identification and implementation of a personal and professional development plan in each academic focus area and the demonstration of the ability to learn from a peer are included amongst his program outcomes.

Programs to enhance a teacher leader’s ability to instruct are plentiful in the literature. Maeroff (1988, as cited in Gehrke, 1991) cited several programs for enhancing teachers’ ability to facilitate student learning by increasing their knowledge of their subject matter. An update of content knowledge also formed the basis of leadership training presented in the Pittsburgh Public School District’s Schenley School Teacher Center (Johnston, et. al., 1990). The National Faculty (1996), founded by the U.S. National Endowment for the Humanities in 1968, has designed several long-term academic programs that bring together Kindergarten through Grade 12 teachers and university scholars for collegial study in a specific subject area; the development of teacher leaders is a stated goal of many of their programs. Rogus (1988), in his proposed framework for conceptualizing a teacher leader program, extended content expertise to include amongst his projected outcomes a demonstrated command of the literature in his or her academic field. Zimpher’s schemata (1988) of the teacher leadership program based in Columbus, Ohio, identified classroom processes as a knowledge domain to be explored. She explicitly recommended reviews of research on teacher effectiveness and classroom management and reviews of alternative conceptions of effective teaching. Among the recommended activities for teacher leaders in training are the completion of personal inventories of teaching style and behaviour.

The role of assisting peers can be seen in a variety of teacher leadership activities, including the organization of relevant in-service education, mentoring, coaching or consultation, and peer evaluation. Interpersonal skills are requisite to peer assistance. Lieberman, Saxl and Miles (1988) identified several relevant skills, including individual diagnosis of teachers’ communication needs and concern and coaching/advising. Knowledge of instructional
improvement and teacher effectiveness models was also considered important (Zimpher, 1988) to teacher leaders.

Several programs for teacher leaders have included skills and knowledge domains relevant to peer assistance in their curricula. As early as 1982, Joyce and Showers offered guidance to program creation for teachers in peer coaching. Little, Galagaran, and O'Neal (1984) later offered directions for training of teachers for teacher assistance responsibilities, based on the California experiences in mentor teacher programs and teacher advisor projects. This study provided valuable information on specific principles at play in face-to-face advising, an important aspect of effective teacher-advisor relationships. Raney and Robbins (1989, as cited in Gehrke, 1991) have provided an overview of the cognitive coaching program offered in Sonoma County, California. Anderson, Asbury, Grossman, Howey, Rentel, and Zimpher (1988) described a peer assistance program in Ohio. The Columbus School District, Columbus Education Association and Ohio State University partnership developed a menu of ingredients for a proposed teacher leadership program which included incentives for teacher cooperation and opportunities and structures that encouraged collaboration. Descriptions have also been given of the Schenley High School Teacher Center and the preparation for teacher assistance and performance review of the Pittsburgh teachers who participated in it (Johnston, et. al., 1990).

It is of interest that several recent professional development programs were the result of inter-organizational collaborations. Although most of these inservice programs were in the form of a university-school district partnership (e.g. Clarke, et. al., 1998; Coles & Bojar, 1997; Forster, 1997), there are examples of other forms of collaboration. For instance, the Teachers' Academy in the state of Missouri, as documented by Chris Belcher and Gene Vinson, was the result of a collaboration between a university and a state-funded professional development center (1997).
The literature on inservice training for teacher leadership is rich with the documentation of inservice programs accompanied by programmatic recommendations by the program designer (e.g. Zimpher, 1988) or theoretical program frameworks (e.g. Berry & Ginsburg, 1990). Empirical investigation into the effects of leadership training on teachers and their peers and students is sparse, as could be expected in this relatively young field of research. Future empirical research in this area will facilitate significant understanding of and advances in inservice leadership training.

2.6 TRAINER-OF-TRAINER PROFESSIONAL DEVELOPMENT MODEL

Many school districts have implemented trainer-of-trainer or key teacher professional development programs that utilize teacher leaders. In this professional development model, inservice training is provided to a school representative with the expectation that the teacher will pass the message on to his or her colleagues (Ross, 1990). This model is consistent with research discussed earlier in this chapter that suggests that teacher leaders can play an important role in providing ongoing assistance to their peers through various approaches. Trainer-of-trainer professional development is also consistent with the value of collegial collaboration.

There are several reasons presented in the trainer-of-trainer literature for its use in schools. As Ross (1990) has suggested, the first reason is pragmatic: training teacher representatives is more economical than training the entire population. Ross (1990), in a study of sixty-four fourth-grade classes, found that training teacher representatives from schools produced nearly the same improvements in student learning as training all teachers. These results were duplicated by Neef (1995, as cited in Rolheiser, et. al., 1999) in his study of pyramidal parent training by peers.

Secondly, it is argued that the act of training other teachers fosters the teacher trainer's own growth. This argument is strongly supported in literature that addresses the value of teacher to teacher interaction and collaboration. For example, Ross (1990) cites Louis and Dentler's 1988 review of twelve state and regional school improvement projects in which they found that
talking about the innovation played a major role in implementation and adoption decisions. Wasley’s qualitative study of teacher collaboration (1992) also supports this argument. In her study of five teacher-leaders, she found that the act of explaining fosters the teacher leaders’ own growth in that they learn through a constant examination of their activities.

Thirdly, it is argued that teachers learn best from their peers. Barkley, McCormick, and Taylor stated that, “teachers will tend to listen to, engage in dialogue with, and learn more about teaching from peers they consider to be experts in instruction” (1987, p.45). The reduction of teacher isolation and the development of collaborative learning communities also could be cited as reasons for the use of this professional development model. Teachers training other teachers can serve as a catalyst for this change by opening their classrooms to their peers and engaging in more public forms of teaching (Rach & Hoyle, 1990; Vesilind & Jones, 1998).

A review of the literature on the trainer-of-trainer professional development programs reveals common components. First of all, there is a concern with the identification and selection of future trainers. Ross (1990) asserted that the key teacher or trainer-of-trainer method would be strengthened if the key teachers were selected on the basis of criteria relevant to the desired outcomes. In her school-based teacher educator model, Bartunek (1989) insisted that the teacher who will train teachers should be identified on the basis of competence and not simply by position or years of teaching. Rach & Hoyle (1990) also recommended that teachers who serve as trainers must have a strong professional knowledge base and a willingness and a commitment to teach their peers. In the project they describe, a selection procedure was employed that included the submission of a taped teaching segment and completion of an instructional knowledge test. A similar application process was used to select Richmond County cadre teachers after the first year of whole-school training (Joyce, et. al., 1989). Desrochers and Klein (1990) described a trainer-of-trainer program in the Sulphur Springs school district in the U.S. state of California. Teachers recruited as trainers were selected for their openness to new ideas, their positive enthusiasm for and commitment to the program, their willingness to work with peers, and their classroom expertise. Olson and Besch (1983) described the use of the trainer-of-
trainer model in the Teaching/Learning Core in-service program. The future trainers were chosen for their competence as master teachers and their willingness to model and share their competencies with peers. Drawing upon her extensive experience in trainer-of-trainer programs, Carol Rolheiser stated that the credibility and respect individuals have in the eyes of their peers is also a critical characteristic that should be considered in the identification of a peer trainer (personal correspondence, March 2000).

The literature on the trainer-of-trainer model highlights that the training program must facilitate the acquisition of knowledge and comprehension of the in-service content. This acquisition is usually facilitated by the future trainer’s participation in a formal workshop. As part of this knowledge acquisition and comprehension, the future trainers are often given the opportunity to internalize the knowledge through classroom application. In the Richmond County project described by Joyce, Murphy, Showers, and Murphy (1989), all teachers and administrators in three schools were trained in new teaching strategies associated with a school renewal program. Opportunities to acquire knowledge and skills associated with the new teaching strategies were offered during a summer institute. In order to accelerate the comprehension and internalization of these new strategies, teachers were asked to practice the teaching strategies no less than thirty times during a two-month period. Study groups also met weekly throughout the first year to reinforce this process. A cadre of trained teachers and administrators facilitated the same training process in other schools following the completion of the first program year.

There are several other examples of the facilitation of knowledge acquisition, comprehension, and internalization in the trainer-of-trainer literature. In Ross’s study teachers were presented with the theory behind an instructional improvement, an outline of a generic instructional procedure, and a sample lesson. Following exercises during the in-service session, teachers were encouraged to use the instructional units provided in their classrooms and share their experiences at a later session (1990). In the Keystone Project described by Rach and Hoyle (1990), teachers participated in a 120-hour training program. Approximately eighty per cent of
the program provided opportunities for participants to develop an understanding of the core workshop content of "writing across the curriculum." The future trainer also selected a content unit and taught a series of lessons in the classroom utilizing skills and knowledge acquired in the workshop. In this manner the workshop content was internalized. In the Sulphur Springs program future trainers received three separate five-day courses in the content area of teacher decision-making. The courses were scheduled over three semesters. To encourage the internalization of course content, teachers received specific classroom application assignments to plan and implement between courses (Desrochers & Klein, 1990). In the Assessment in the Cooperative Classroom project future trainers attended an initial full-day session that provided an overview of the theory and research supporting student self-assessment and experiential activities to facilitate comprehension. Trainers returned to their schools to apply the four-stage model of assessment in their schools with their trainees thereby internalizing this content (Rolheiser, et. al., 1999).

Researchers also recommend that the future trainer be provided with the opportunity to develop skills necessary for the design and implementation of staff development activities. Although the exact nature of these skills is dependent upon the specific training program, the skills are usually associated with adult teaching and learning, effective collaboration, and peer coaching and advising. Despite Ross's report that future trainers are rarely given training in collaborative strategies (1990), one example can be cited. Future trainers in the Keystone Project received six hours of training in adult learning theory and two hours of training in "checking for understanding" strategies appropriate for use with adults in a workshop setting in the original forty-hour training workshop. Later, trainers participated in continuing education sessions that developed additional skills required for effective staff development. Training subjects included "Creating Effective Visual Aids," "Processing the Workshop Presentation," "Motivating Adults," "Dignifying Adult Responses," and "Refining Presentation Skills" (Rach & Hoyle, 1990, pp.45-46).
Coaching, which is discussed later in this chapter as an important component in a trainer-of-trainer program, requires specific preparation. Costa and Garmston (1994) recommended that teachers receive an orientation to the coaching process. They suggested that the Association for Supervision and Curriculum Development (ASCD) videotape *Another Set of Eyes: Conferencing Skills* serve as a centrepiece in skills training sessions for coaching (Costa & Garmston, 1994). After experimenting with teachers training teachers with no preparation, the assistant superintendent of the Sulphur Springs school district provided future trainers with a four-day course in peer coaching. The teachers learned and practiced conferencing, data collection, and analysis skills (Desrochers & Klein, 1990).

The literature also suggests that the future trainer should be provided with or prepare instructional resources to support staff development efforts. The ready availability of materials was cited as critical for teachers’ implementation of an instructional innovation in nearly all studies. Wu (1987) also argued for the use of external resource personnel such as speakers and coaches. In the 1990 study by Ross, future trainers were presented with instructional units, testing materials, a short manual providing an overview of the first in-service session, and suggested timelines. The Keystone Project (Rach & Hoyle, 1990) and Richmond County project (Joyce, et. al., 1989) trainers formulated classroom examples of appropriate uses of the workshop content and developed visual aids, including videotaped teaching demonstrations, to enhance their presentations to peers. Stokes County trainers used commercially prepared demonstration videos and external consultants in support of staff development efforts (Williamson & Russell, 1990). Teaching/Learning Core trainers were provided with a resource book and workbook on the content area, a sourcebook of activities for training sessions, and a demonstration video. As dissemination of the instructional improvement commenced, teacher-developed projects were compiled into resource notebooks for use by all teachers (Olson & Besch, 1983). In the Delaware Agenda for School Improvement project, trainers were provided with an instructional videotape, scripted training modules, and supplemental materials for use in school-based inservice programs (Barkley, et. al., 1987). In the Assessment in the Cooperative Classroom project, trainers
received a copy of a self-evaluation handbook with relevant case studies and practical instruments and forms to support the assessment model (Rolheiser, et. al., 1999). Of note, qualitative data in the lead teacher study by Vesilind and Jones revealed that the lead teachers who were the subject of the study viewed the distribution of instructional resources as a vital part of their leadership role. One teacher in this study described herself as a "funnel," since she found resources and made them accessible to other teachers (1998, p.766).

There are a variety of forms of staff development activities provided by teachers serving as trainers described in the literature. District- or school-based inservice presentations were utilized in the Delaware Agenda for School Improvement project (Barkley, et. al., 1987), the Teaching/Learning Core project (Olson & Besch, 1983), the key teacher project studied by Ross (1990), the Richmond County project (Joyce, et. al., 1989), the lead teacher project described by Vesilind and Jones (1998), and the Keystone project (Rach & Hoyle, 1990). The inservices ranged from the formal presentations of the Keystone project to the informal, small group "turn-around sessions" of the Teaching/Learning Core project. In addition to formal inservice workshops, the Assessment in the Cooperative Classroom project employed action research as a staff development tool (Rolheiser, et. al., 1999). In the lead teacher program described by Vesilind and Jones, lead teachers used parental involvement as a public force to influence peer teachers. Acting against the teaching profession's norm of privacy (Lortie, 1975, as cited in Hart & Bredeson, 1996), they also provided public demonstrations of instructional innovations. These public demonstrations took the form of hallway displays, presentation of student projects to the principal, and student activities outside the classroom (1998).

A coaching approach was identified in several projects reviewed in the literature. The Dayton school district's teacher-led peer networking project was designed to prepare teacher-facilitators to guide the individual staff development of their building and district colleagues. The program's focus was peer coaching, which emphasized systematic analysis and improvement of instruction (Hopfengardner and Leahy, 1987). At St. Petersburg High School (SPHS) a faculty-designed and implemented in-house program, Teachers Teaching Teachers, fostered collegiality
through its coaching component (Tuthill et al., 1987). The Sulphur Springs project (Desrochers & Klein, 1990) and the Fort Worth Independent School District project (Leggett & Hoyle, 1987) were also based on a coaching strategy. Of note, Rolheiser stated that the form that coaching assumed in many programs identified in the trainer-of-trainer literature was very dependent on the program developer’s definition of this concept (personal correspondence, March 2000).

As stated earlier Joyce and Showers (1982, 1995) have identified coaching as one of five major components of training. Coaching helps teachers transfer a teaching innovation into the classroom with the ongoing assistance and support from someone else familiar with it. Coaching support is individualized in order to meet each teacher’s specific needs and context (Seller, 1987). Two basic approaches to coaching have been identified in the literature. In the first approach a trainer or external resource person provides information on the desired change, assists the teacher in skills acquisition, and then follows up by providing coaching to the participants (Showers, 1982, as cited in Sellers, 1987). In the second approach, peer coaching, the teaching innovation is learned by teachers through workshops or other professional development activities and reinforced by coaching activities conducted by teachers within the school (Grimmett, et. al., 1986, as cited in Sellers, 1987).

The coaching process, as described by Costa and Garmston (1994), consists of three stages: the planning conference, lesson observation, and reflecting conference. During the planning conference the coach mediates by having the teacher clarify lesson goals and objectives, anticipate teaching strategies and decisions, determine evidence of student achievement, and identify the coach’s data gathering focus and procedure. During observation of the lesson, the coach gathers data by observing evidence of student achievement and teacher strategies and decisions. During the reflecting conference the coach mediates by having the teacher summarize impressions and assessments of the lesson, recall data supporting those impressions and assessments, compare planned with performed teacher decisions and student learning, and infer relationships between student achievement and teacher decisions and behaviour. The coach also facilitates application of new learnings during the reflecting
conference by having the teacher synthesize and prescribe applications. During the conference the coach also facilitates reflection on the coaching process itself. Seller’s in-school resource coaching model follows a very similar process, described as a sequence of analysis, observation, planning, and plan implementation (1987). These sequential models are the basic structure of coaching; it is expected that coaches may duplicate steps or embellish the process in order to meet an individual’s unique needs (Costa & Garmston, 1994).

The Stokes County project is worthy of exploration because its staff development approach combined coaching with an inservice program. In the Stokes County project thirty-five second- and third-grade teachers attended a two-day workshop on mathematics manipulatives presented by two teachers trained in this instructional innovation. Six of the second- and third-grade teachers who had attended the workshop were randomly selected to participate in a follow-up coaching project. Each trainer coached three teachers during an academic year. The teachers observed the trainer in his or her classroom conducting a lesson using the instructional innovation. Next the trainer demonstrated the use of manipulatives in the teachers’ classrooms. Following this demonstration, with the assistance of a trainer, each teacher planned a lesson using manipulatives. The lesson was then implemented while the trainer observed and later gave feedback. The trainer demonstrated another lesson in the teachers’ classrooms and then implemented cycles of follow-up assistance throughout the school year that involved working with the teachers, observing instruction, and providing technical feedback in post-lesson conferences. Additionally, all teachers participating in the coaching project were required to meet monthly with the trainers. During these large meetings, trainers presented programs which they had planned that included videos, presentations by external consultants, and additional demonstrations by the trainers (Williamson & Russell, 1990).

The Stokes County project study completed by Williamson and Russell (1990) draws some important conclusions about a trainer-of-trainer professional development model that employs a coaching component. Using the Concerns-Based Adoption Model (Hall, 1979) as an evaluation strategy for this project, the evaluators stated that coached teachers reported
significantly increased use of mathematics manipulatives in their classrooms as compared to the control group of teachers who had attended the first workshop but did not receive the extended assistance of the trainers. Furthermore, the coached teachers demonstrated an increased understanding of the purpose of and expressed greater confidence about mathematics teaching. Concerns for more information and personal concerns about efficacy and management of the new materials had dramatically declined by the end of the school year. At the same time coached teachers expressed a strong interest in collaborating with other peers to increase the use of the manipulatives systemwide.

The success of the trainer-of-trainer model appears to be contingent upon several factors. Already discussed are the selection of appropriate teachers to serve as trainers, the acquisition, comprehension and internalization of content-based knowledge and collaborative skills, the development or provision of instructional resources to support staff development activities, and the use of coaching by trainers. Also essential is the support of administrators and other “agents” in the school and district (Bartunek, 1989; Ross, 1990; Williamson & Russell, 1990). Principals play a key role in helping peer training to flourish on-site. In addition to arranging for substitute teachers and release time for project teachers, principals can personally model desired coaching behaviours (Desrochers & Klein, 1990; Garmston, 1987). Some projects, such as the Richmond County project (Joyce, et al, 1987), sought to build administrative support by directly engaging the principals in the training process. Linked to administrative support is the need for a supportive school culture. A culture that permits collaboration also supports collegial leadership, as the lead teacher study by Vesilind and Jones documented (1998).
Chapter 3
Methodology

This chapter describes the methods by which data were collected about teacher-participants’ concerns and perceptions about the dissemination of art object-based learning. Literature about teacher leadership, professional development, and the trainer-of-trainer professional development model strongly informed the study.

3.1 THE SAMPLE

The population of this study was drawn directly from the professional development initiative's participant group. This research study was initiated by the supervisor of the professional development initiative, hereafter referred to as the investigator. The sample consists of the twenty-four teacher-participants of this professional development initiative. These teachers represent nineteen elementary, middle, and secondary schools in the four school districts of Aiken, South Carolina, and Burke, Columbia, and Richmond, Georgia. Thirteen teacher-participants work at elementary schools, eight at middle schools, and three at high schools. Five teachers work in Aiken County, three teachers in Burke County, five teachers in Columbia County, and eleven teachers in Richmond County.

Table 1: Teaching Specialties of the Teacher-Participant Group

<table>
<thead>
<tr>
<th>Teaching Subjects</th>
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<td>Elementary Generalist</td>
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<td>Gifted Education</td>
<td>4</td>
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<tr>
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<tr>
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<td>Technology</td>
<td>1</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>8</td>
</tr>
</tbody>
</table>

*The total number of teacher-participants in this table will total more than the total number of teacher-participants in this initiative since several teach more than one subject.*
Similar to the teacher group described by Huberman in his illustrative example of an open, collective cycle of professional collaboration (1995), the teacher-participant group is heterogeneous in composition. The teachers represent a variety of teaching subjects; Table 1 details the teaching specialties of all teacher-participants. Of the twenty-four teacher-participants four are male and twenty female. Teaching experience for each individual ranges from three to twenty-five years. Some teacher-participants were involved in implementing another instructional innovation at the time the survey described below was conducted; this distinction will be discussed in Chapter 4.

Teachers were mostly recommended for this in-service initiative by school district administrators and principals. Participant recruitment, however, was handled differently in each school district; recruitment is discussed at greater length in Chapter 5. Entry-level characteristics of teacher-participants were somewhat considered in recruitment. Teachers' professional interests, role in district-level curriculum development, teaching subject and grade level, and potential for leadership development were considered by administrators and principals in varying degrees. The impact of this uneven recruitment strategy will be discussed in Chapter 6.

**Change Facilitators Stages of Concern Survey Sample:**

Twenty-one teacher-participants completed the Change Facilitators Stages of Concern (CFSoC) questionnaire. As the sample represents 87.5% of the total teacher-participants enrolled in the professional development initiative at the time that the survey was issued, this sample is sufficient to reflect the concerns of the whole group.

**Group Interview Sample:**

Four teacher-participants participated in the group interview. These four teachers were recruited exclusively from the professional development initiative's pre-existing program advisory team. These teacher-participants were originally selected as team members to reflect the composition of teachers in this initiative. In the selection of team members, consideration was
paid to equally representing the teaching grade levels of teacher-participants. To this end two elementary teachers and two middle school teachers were selected as team members. Gender was also considered in the original recruitment of these teacher-participants as team members. Three team members are female and one member is male. This gender distribution is consistent with the ratio of female to male teacher-participants. Teachers participating in this initiative hold varying levels of professional teaching experience. The team reflects this variety; levels of experience range from four to twenty years. Additionally each team member represents one school district; the team, therefore, represents each of the four participating districts.

As noted in Table 1, a range of subject specialties characterizes the teacher-participant group. It should be noted that the program advisory team is not fully reflective of the group's teaching subject specialties. The two elementary team members are generalist teachers. The two middle school team members are social studies specialists. Visual art specialists, who compose one third of the group, are not reflected in the composition of the program advisory team.

It is reasonable to utilize this pre-existing team for a group interview as these individuals share a rapport with each other and staff members, communicate regularly with other teacher-participants from their school districts, and are essential players in the curriculum development process for this initiative. For these reasons a decision was made to invite the members of the program advisory team to participate in this group interview. The use of a small sample, in circumstances where the population is homogeneous with respect to the data under investigation, is supported in research. The time-consuming nature of interviews further supported the decision to invite a small sample of respondents to the group interview.

3.2 TIMELINE

Data were collected during the period of August through October 1999. The CFSoC survey and group interview were administered in October. Data analysis was conducted during the period of mid-October through December 1999. A summary and discussion of the study's findings and curriculum recommendations were prepared during January 2000, in preparation for
program implementation beginning in March 2000.

3.3 CFSoC SURVEY

The Change Facilitators Stages of Concern Questionnaire (CFSoCQ) was administered to all consenting teacher-participants on October 8, 1999. The intent was to determine their concerns about the leadership task and to identify the group’s stages of concern according to the change facilitators stages of concern model (Rutherford, et al., 1982). A survey was selected as an appropriate approach for several reasons. A description of the teacher-participant group’s concerns about the leadership task of dissemination was deemed as critical to this study. A written survey would enable the investigator to collect the data efficiently and to correlate these concerns with other variables. While interviews would have provided richer data as to teacher concerns, the survey approach enabled the investigator to use a large sample.

The benefit of respondent anonymity as provided by a written survey was also deemed as important by the investigator. Anonymity in data collection can reduce the social desirability response bias. That is, it can reduce the tendency of respondents to provide answers that show them in a positive light, even if this means that they fail to report their beliefs, attitudes, and thoughts accurately (Robson, 1997). This issue was of critical importance in this study since the investigator and the teacher-participants are known to each other and work together in this initiative. For this reason teacher-participants were given the opportunity to complete the questionnaire without personally identifying themselves to the investigator. Teachers could identify themselves on the questionnaire by name or by the last four digits of their social security number. As the investigator does not have access to the social security numbers of teacher-participants, this approach enabled the teacher-participants to remain anonymous.

The CFSoCQ (Hall, et al., 1991) was selected as the instrument for this written survey. The CFSoCQ is a research-based questionnaire, developed in 1989 by Gene Hall and William Rutherford as an extension of the work completed by the Concerns-Based Adoption Model Project of the Research and Development Center for Teacher Education at the University of
Texas at Austin. The forty-four item questionnaire uses a seven-point Lickert scale to measure the concerns of individuals who have a formal or informal role to aid those involved in learning to use instructional innovations. It reports the intensity of concern on seven scales that range from awareness of the nature of the innovation (Awareness) and the need for information (Information) to concern with personal ability to facilitate change (Personal), managing the facilitation of others in use of the innovation (Management), concern with the consequences of facilitation (Consequence), interest and extent of collaboration with other change facilitators during implementation (Collaboration), and the consideration of alternatives to the innovation (Refocusing). For a description of each of the stages, see Appendix A. The CFSoCQ also includes demographic questions. Data collected through these questions provided a sample description and was used for correlation purposes. Two open-ended questions also provided qualitative data about teachers' concerns. A copy of the questionnaire is attached to this thesis as Appendix B.

The original developers of the CFSoCQ measured the reliability and validity of this instrument. In a series of tests conducted during 1981, a total of 589 35-item CFSoC questionnaires were collected. The sample included a range of experiences in being a change facilitator, different types of educational innovations, and a variety of job groups. The means, standard deviations, and alpha coefficients for each of the 5-item scales were calculated. Subsequent analyses of CFSoCQ data have produced nearly identical statistics. The statistics generated from this earlier study indicated that the scales have adequate internal reliability. It also indicated that the scales are consistent across various innovations. Low intercorrelations indicated that the scales are measuring different concepts. In summary, tests conducted on the CFSoCQ indicate that use of this instrument produces a measure that has independent scales and high internal reliability (Hall, et. al., 1991).

Gene Hall, co-developer of the CFSoC, expressed concern that some teacher-participants may also have had concerns at the time of the survey about the use of the innovation in addition to concerns about their role as change facilitators. He believed that this confusion could affect
the validity of the survey's findings (personal communication, September 1999). This concern
was addressed by the investigator through a presentation to the teacher-participants immediately
prior to the distribution of the questionnaires. The investigator provided a verbal definition of the
innovation described in the questionnaire as the task of aiding their school or district peers in
learning to use art object-based, interdisciplinary teaching strategies and resources in the
classroom. The investigator also stated that the intent of this questionnaire was to measure
teacher-participants' concerns about this task. Responses to open-ended questions on the
questionnaire itself indicated that most teacher-participants understood the focus of this
questionnaire and did not confuse their concerns about the innovation with concerns about their
roles as a change facilitator.

In an effort to maximize questionnaire return, necessary if the program design is to
address the needs of all teacher-participants, the survey for the collection of teacher
concerns/attitudes data was administered to the group during a regularly scheduled professional
development workshop session on October 8, 1999. A letter of consent was mailed to all teacher-
participants several weeks in advance of the workshop session, offering teachers the option of
not participating in the survey as ethical research principles recommend; the letter of consent is
attached as Appendix C. The investigator introduced the purpose of the written survey to the
teachers in the letter of consent and, as noted above, provided additional information regarding
the survey immediately prior to its delivery. Teacher-participants were provided with sufficient
time to complete the questionnaire during this workshop session. The investigator collected the
questionnaires completed by twenty-one teacher-participants at the end of the session. Returned
questionnaires were hand-scored by the investigator according to the guidelines presented by the
instrument's creators (Hall, et. al., 1991).

3.4  CFS0CQ DATA ANALYSIS

The small sample enabled the CFS0C questionnaires to be hand-scored. On the
questionnaire each of the seven stages of concern is represented by five statements. The raw
score for each concern scale was obtained by adding the responses to the five statements. In the case of statements that were not completed by the respondent, the investigator assigned a score that was the average of the responses to the other statements of that scale. This procedure was recommended by the creators of the CFSoCQ (Hall, et. al., 1991).

Raw scores were converted to percentile scores for interpretation. These percentiles were developed by the questionnaire’s authors. They are based on the responses of the 589 individuals who completed the questionnaire in 1981. These individuals were a carefully selected sample from elementary and secondary schools and higher education institutions with a range of experience in facilitating a variety of innovations (Hall, et. al., 1991).

CFSoCQ data for the group were displayed as a graph using a format provided by the questionnaire authors (Hall, et. al., 1991). Graphic representation of CFSoCQ data greatly assisted interpretation. As the authors discussed in the questionnaire manual (Hall, et. al., 1991), there are several different approaches to interpreting the data collected from the CFSoCQ. The simplest form of interpretation is to identify the high or peak stage. A more detailed interpretation is developed by examining both the peak stage and the second highest peak stage score. The most sensitive interpretation is developed by analyzing the complete profile.

Interpretation of peak scores, second highest peak scores and profiles can be done with individual or group data. With any of these methods, demographic data can also be correlated with stage scores for a richer interpretation. For this study a group profile of the mean percentile scores for each stage of concern was generated and interpreted. The heterogeneity of the sample was also explored. Scores were correlated with the teacher-participants’ experiences of single or multiple innovations and demographic data.

Two qualitative questions were included in the CFSoC questionnaire. Question 43 directed teachers to “use this space (and back of page) to express any concerns you have not been able to indicate in the questionnaire.” Question 44 asked “what do you hope to learn from this workshop.” Responses to these open-ended questions can illustrate the reasons behind the
shape of the CFSoCQ profile (Hall, et. al., 1991). The investigator transcribed the qualitative responses to both questions and prepared a summary report, which is presented in Chapter 4.

3.5 GROUP INTERVIEW

A group interview was selected as an appropriate strategy to analyze the leadership task of dissemination of art object-based, interdisciplinary strategies and resources. The group interview also was used to validate and interpret the results of the CFSoC survey.

A group interview was selected as an appropriate strategy for several reasons. This strategy enabled the investigator to collect detailed information. When face to face discussions are held with an investigator and a group of peers, respondents are more likely to share thoughts, feelings, and attitudes than they might if answering a questionnaire. This type of discussion also permits the investigator to modify the line of enquiry, follow up on interesting responses, and investigate underlying issues. Since the group interview participants also serve as members of the program advisory team, they were expected to represent the views of all teacher-participants. It was reasonable to employ a research methodology that would permit and encourage these individuals to share observations, perceptions, opinions, and beliefs, and to provide more in-depth explanations as appropriate.

The group interview employed in this study may be described as a semi-structured group interview. The investigator developed a set of questions in advance that addressed the research question (see Appendix D) but was free to modify the questions based on her perception of what seemed appropriate in the context of the conversation. For instance, the investigator could change the order or wording of the questions, offer explanations, leave out particular questions that seemed inappropriate, or include additional questions (Robson, 1997). A semi-structured group interview is appropriate in situations where the discovery of as much information as possible about the issues is important. While the flexibility of the interview format is clearly an advantage of this strategy, the lack of standardization that it implies raises concerns about reliability and biases. Interpersonal dynamics and the social desirability response bias can also
negatively affect the participation of all respondents during a group interview. Despite these disadvantages this method permitted the investigator to collect rich, qualitative data.

The group interview was conducted on October 29, 1999. A letter of consent was mailed to the team members in advance, offering teachers the option of not participating in the discussion as ethical research principles recommend; the letter of consent is attached as Appendix C.

3.6 GROUP INTERVIEW DATA ANALYSIS

The interview was audiotaped with the permission of the participants. A word for word transcription of the group interview was prepared by the investigator. Following the transcription the group's responses were summarized and organized into categories based on emergent themes or concepts drawn from the literature review.

3.7 TREATMENT

Emphasis in year one of the professional development initiative was placed on the acquisition of knowledge and skills pertaining to the interdisciplinary study of works of art using an art object-based inquiry method, the role of art in an interdisciplinary curriculum, and art object-based, interdisciplinary teaching strategies that utilize related community resources as teaching aids. Teachers organized into cooperative learning groups developed an interdisciplinary instructional unit that utilized a work of art as a teaching resource.

Year two of this professional development initiative began in July 1999 with a one-week summer institute held July 12-16, 1999. The interdisciplinary theme of "family" was selected after consultation with the program advisory team. The reasons for the selection of this theme were diverse. This theme was relevant to various curricula at the elementary, middle, and secondary levels. It also presented an opportunity for exploration from the perspectives of several disciplines including art, literature, history, and sociology. Moreover, utilizing this theme as an organizing concept enabled this institute to become a model for an integrated curriculum in
which disciplines co-exist but do not compete. Each day of the institute addressed a particular time period with presentations by scholars on Southern studies (i.e. art, history, literature, oral traditions, and folklore) and hands-on exploration of local history, culture, and related resources. Museum staff and master teachers demonstrated relevant, family-themed classroom projects. An opportunity was also provided for teacher-participants to observe a museum educator instructing fifth-grade students at the museum. The institute sessions featured a variety of teaching strategies, including lecture, cooperative working groups for planning and developing ideas, guided individual planning and work time, and small and large group sharing sessions. The institute provided conceptual inputs from a variety of external specialists, didactic leads, opportunities for experience sharing, and observations, and thus initiated an open, collective cycle of professional collaboration as recommended by Huberman (1995).

At the conclusion of the summer institute, teachers participated in county team discussions about several issues including advocacy and dissemination of instructional practices. These discussions were facilitated by the members of the program advisory team and supported by the program staff, who prepared the following questions to guide the discussions:

- How can interdisciplinary units be implemented in your school?
- How can your new knowledge and skills be shared with your colleagues?
- What support exists for these activities in your school and your district?

The discussions were positive in mood and contributed some concrete suggestions for innovation implementation and dissemination. These discussions prepared the teachers to begin to consider the issue of dissemination.

Between the summer institute and the fall workshop, teachers reviewed individual classroom curricula to reveal opportunities for integrating works of art that address the topic of family. In addition to continuing to build their knowledge of works of art in the museum's collection, teachers will develop two curriculum-based, instructional units during the three two-day workshops presented during the 1999/2000 school year. A third instructional unit will be prepared in the third year of the initiative. Units will integrate Southern art and cultural history
into teachers' classroom curricula and will utilize field experiences at the Morris Museum of Art and other community resources. A strong emphasis will be placed on connecting the classroom and community through oral and material history, genealogical, and creative projects that also utilize the museum's Southern art collection. The development of the instructional units will be supported through consultation with other teacher-participants and scholars. This activity parallels Huberman’s development of new methods and pedagogical analysis stages of his open, collective cycle of professional collaboration model (1995).

In accordance with Huberman’s model (1995), teachers will also field-test their units. Funds have been secured from a private foundation to financially support multiple field excursions to the Morris Museum for each teacher. Teachers apply for these funds through a re-granting process and must provide evidence of the assessment of their lesson or unit as part of a final report. The deadline for grant requests was October 1, 1999. Teachers will share the results of their field tests through informal presentations scheduled during the 2000 winter and spring workshops. These informal presentations are similar to the exchanges described by Huberman in his model (1995).

The CFSoc survey of teacher-participants was conducted during the fall workshop, scheduled on October 8 and 9, 1999. The survey was administered by the investigator. The group interview was conducted on October 29, 1999. At this meeting a summary of the workshop evaluations completed by participants was also reviewed and recommendations formulated for the next workshop. A significant portion of this meeting, however, was dedicated to an analysis of the required leadership skills for the task of dissemination of instructional practices and resources. The investigator facilitated this discussion.
Chapter 4
Findings

In this chapter the data collected through the CFSoC survey and the group interview are reviewed.

4.1 CFSoC SURVEY

As individuals or groups move from little concern about facilitating use of an innovation to becoming actively involved with users as a facilitator, it is hypothesized that their concerns develop from intensity at Stages 0, 1, and 2 to most intense at Stage 3, and later most intense at Stages 4, 5, and 6. This evolution of concerns is most likely to occur if the innovation is viewed as positive and there is administrative support for its implementation. The location of an individual or group in this change process can be determined by the analysis of the plots of these percentile scores as a graph (Hall, et al., 1991).

Twenty-one teacher-participants completed the CFSoCQ on October 8, 1999. The stage of concern percentile scores for each respondent and the average group score for each stage is provided in Table 2. Note that respondents are identified by a four-digit number to ensure anonymity.

Table 2: CFSoC Survey -- Individual and Group Mean Percentile Scores

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<tr>
<th>I.D.</th>
<th>Stage 0</th>
<th>Stage 1</th>
<th>Stage 2</th>
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4.1.1 CONCERNS PROFILE

Figure 1 is a graph showing the teacher-participant group’s mean percentile scores for each stage of concern. This group profile is readily identifiable as the concerns profile of a group that is beginning to be involved as a facilitator of the innovation addressed. This interpretation is indicated by the high scores on Stages 0, 1, and 2 and the lower scores on Stages 4, 5, and 6. As indicated earlier the high peak stage score for Stage 0 indicates the group has intense concerns about a number of things other than the innovation being dealt with in the CFSoC. The high scores for Stages 1 and 3 indicate strong concerns with learning more about the innovation and with the time, logistics, available resources, and energy involved in facilitating others in the use of the innovation. The somewhat high score for Stage 2 or Personal is consistent with individuals considering their role as change facilitators for the first time. This score indicates a moderately strong concern with their abilities to act as change facilitators. The increase in concern on Stage 5 is also not unusual for a change facilitator at this point. This score indicates some concern with coordinating with administrators or other change facilitators to increase one’s capacity to facilitate the change process. For teachers a concern with securing the support of school administrators for this process is likely. The low Stage 6 or Refocusing score indicates that the group is not considering refocusing or generating alternative forms of the innovation. This interpretation of the teacher-participant group’s concerns will be enhanced during the later discussion of the CFSoC qualitative findings.
Correlation of "Another Innovation":

A question in the demographic section of the questionnaire asked if teacher-participants were currently involved in implementing another innovation. Current involvement with implementing another innovation could affect the type and degree of concern felt by a teacher-participant. Statistical analysis was employed to determine if this variable significantly affected teachers' concerns. Teacher-participants' responses to this question were used to sort the sample into two sub-groups. Six of the twenty-one respondents indicated that they were currently involved in implementing another innovation; the remaining fifteen respondents indicated that they were not involved in this activity. Figure 2 illustrates the concerns profiles for these two sub-groups.
It is apparent from the graph that the largest differences in levels of concern between these two sub-groups exist at Stage 2 or Personal, Stage 3 or Management, and Stage 5 or Collaboration. In order to prove that the difference between the sub-groups was statistically significant, a separate between-subjects one-way analysis of variance (ANOVA) was performed on data collected on all seven stages of concern. This analysis compared survey responses of teachers who are involved in another innovation to responses of teachers not involved in another innovation. At the .95 confidence level, only Stage 3 was marked by a significant difference (see Table 3).

Stage 3 or Management is the second highest stage of concern for the sub-group of teacher-participants not currently involved in implementing another innovation. This score indicates that these teacher-participants have relatively strong concerns about the time, logistics, available resources, and energy involved in facilitating others in the use of the innovation. The sub-group of teacher-participants currently involved in implementing another innovation is, by comparison, much less concerned with these same issues.

The differences between the two sub-groups at Stage 2 and Stage 5 are worthy of note. While the differences are not statistically significant, the small sample size increased the difficulty of observing and measuring quantitative relationships. The level of concern at Stage 2 or Personal is higher for the sub-group of teacher-participants not currently involved in implementing another innovation as compared to the sub-group currently involved in implementing another innovation. This difference indicates that this sub-group has greater uncertainty about their personal ability and role in facilitating use of the innovation and greater doubt about their adequacy as an effective change facilitator. They may also have more questions about institutional support and rewards for assuming this responsibility.

The level of concern at Stage 5 or Collaboration is lower for the sub-group of teacher-participants not currently involved in implementing another innovation as compared to the other sub-group. This difference indicates that this sub-group has less concern about coordinating with
other change facilitators and/or administrators so as to increase their capacity to facilitate use of the innovation. It is noteworthy that the peak stage of concern for the teacher-participant subgroup currently involved in implementing another innovation is Stage 5. The manual authors noted that a high Stage 5 score distinguishes an experienced change facilitator's profile (Hall, et. al., 1991). This high peak stage score likely reflects this subgroup's experience with implementing another innovation.

Table 3: CFSoC Survey -- ANOVA using Variable of “Implementing another Innovation”

<table>
<thead>
<tr>
<th>Source</th>
<th>df</th>
<th>SS</th>
<th>MS</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 3</td>
<td></td>
<td>6743.333</td>
<td>6743.333</td>
<td>9.7220255</td>
</tr>
<tr>
<td>Error</td>
<td></td>
<td>13178.687</td>
<td>683.61404</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>19922</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Critical Value of $F$, 95 (1,19) = 4.38

4.1.2 CFSoCQ QUALITATIVE DATA

Two qualitative questions were included in the CFSoCQ. Question 43 directed teachers to “use this space (and back of page) to express any concerns you have not been able to indicate in the questionnaire.” Question 44 asked “what do you hope to learn from this workshop.” Responses to these open-ended questions can illustrate the reasons behind the shape of the CFSoC profile (Hall, et. al., 1991). A summary report of responses to these two questions is provided below. The responses are not sorted by question but rather by emergent themes or concepts drawn from the literature review. The data are reported in order according to the frequency of response. All responses are presented as direct quotations and are identified by the questionnaire identification number.

Concerns about Knowledge and Application of Instructional Innovation:

Many teachers expressed concerns about the instructional innovation itself rather than the
dissemination of the innovation to peers. One respondent asked for additional opportunities to acquire more knowledge about the innovation:

I hope to learn more about historical artwork that relates to family...I also hope to "practice" looking at art and "reading" it. (4669)

Ten respondents expressed concerns about the impact of this instructional innovation on students and about implementation of the instructional innovation in their classrooms. A full listing of these responses is provided below.

How to better educate my students on the aspect of art being a part of their everyday life. I would like for them to know that it is as important as their core subjects because it is a result of math, language arts, social studies, etc. (1234)

How to transfer skills/knowledge from the workshop to the classroom. (1236)

More strategies to use in interdisciplinary [teaching]. (6216)

How to use art with other subjects; and a deeper understanding of and how to develop understanding of works of art. (0322)

How to implement art. (1237)

How to create a good lesson plan for my students; how to make field trips to the museum fun & meaningful for my students. (3779)

To develop an intense unit on genealogy for 6th grade gifted students. How to incorporate tours to the museum and the Genealogical Society in my unit. (1240)

Become stronger in incorporating art into curriculum. (4806)

How to better implement what we are focusing on... (2512)

To develop exciting lesson plans utilizing art, as well as many disciplines (4182)

Personal Concerns about Peer and Administrator Support:

Five respondents expressed concerns about peer and administrator support consistent with Stage 2 concerns. Responses addressed concerns about relationships with peers and indicated questions about support by administrators for dissemination of this innovation:
The reception of the innovation by the faculty. (7529)

...how to excite other participants... (4669)

...cooperation, admin. support... (7625)

It really needs buy-in from top administrators who will make this a priority and not just another add-on. Great programs like this one often get buried in bureaucratic systems. The arts in education needs to be high priority. More education for administrators could help. (1235)

More ways to use the school system to implement team teaching to amplify interdisciplinary lessons. (1238)

Concern with Personal and Classroom Management:

Three respondents expressed management concerns consistent with Stage 3 concerns. Responses addressed concerns about the limited resources of time and money and the risks of staff overload:

How I can find the time and energy to include yet one more activity into an already full curriculum. (6769)

How to better implement what we are focusing on and find time in my schedule to do so! (2512)

Money, testing (state), standards, overload, burnout... (7625)

Concern with Participant Recruitment:

One respondent clearly expressed that this instructional innovation is not an area of interest or concern for them. While consistent with a Stage 0 concern, this response appears to indicate a concern about the initial teacher selection and recruitment for this project:

I feel that this workshop is not appropriate for the objectives that I am required to teach. If I am spending this much time on a project, I wish it would be something that I am interested in and could use. I feel that teachers chosen for this project should have been given the opportunity to volunteer to do it, rather than have been told to do it. (2311)
4.2 GROUP INTERVIEW

The group interview was conducted at the Morris Museum of Art on Friday, October 29, 1999. All four members of the program advisory team participated in the interview; however, one team member joined the discussion after the interview had been in progress for fifty minutes. The group interview lasted sixty minutes. A transcript of the group interview was made by the investigator. Following the transcription the investigator prepared a summary report of the responses, which is provided below. The responses are not sorted by the original guiding questions (see Appendix D) but by emergent themes or concepts drawn from the literature review. The data are reported in the order that the themes or concepts were discussed during the interview.

Dissemination:

In the group interview team members discussed dissemination as the conscious distribution of art object-based instructional strategies and resources to school or district peers. The development and distribution of instructional resource packages and the presentation of inservice workshops based on these packages were described as acts of dissemination by teacher-participants. Dissemination was also discussed as the act of soliciting general support for the use of art object-based instructional strategies and resources and specific support for use of the Morris Museum as a teaching resource. While the team members did distinguish between actions taken at the school level and those taken at the district level, the majority of their comments addressed dissemination efforts at the school level.

Instructional Resources:

When team members were first asked the guiding questions (see Appendix D), their immediate response was to request an instructional resource package that they could keep in their classroom and share with their colleagues.

Teacher #3: ...[Other teacher-participants and I had discussed] creating some type of kit
that could be checked out or a suitcase or something. I think teachers would be more willing to try this if there was a set lesson.

Investigator: So having a kit that would act as a resource for a teacher to access? Do you see the trained teachers like yourself as assisting other teachers to use the kit?

Teacher #3: Maybe we could show them an example. [I'm] not sure. We could show them examples of some ways that you could incorporate art and other resources here at the museum.

Later the team members discussed the content of this instructional resource package. They agreed that it should include model lessons and units prepared by teacher-participants, background information on art images, and reproductions of works of art in different media, including slides, transparencies, and posters. It was also suggested that the museum provide digitized images of works of art on its World Wide Web site. Team members recommended the inclusion of three instructional units. The first unit should be basic in content and introduce art vocabulary and basic concepts of using art in the general curriculum. The second and third units should be more advanced, assuming that the teacher has learned the basic concepts through the teaching of the first unit. The team members asked that the organization of the resource packages be based on theme or time period rather than on grade-level curricula. Teachers could then customize the lessons to meet the needs of their students' grade and skill levels. Themes would enable teachers to easily connect to the social studies curriculum. It was suggested that the museum prepare a short videotape on the TNF-MMA initiative. This videotape could include teaching demonstrations set in the classroom and in the museum.

Team members clarified the supporting role of the teacher-participant in the use of the instructional resource package. Once developed, at least one copy of the instructional resource package should remain with the teacher-participant rather than be placed in the school's media center. This ensures that other teachers are encouraged to seek assistance from the teacher-participant. The teacher-participant can also help their peers customize lesson(s) to meet their curricular needs.

Teacher #2: I think that the idea that each teacher in the program [has] a kit readily available through us [is good] because I think that it's important that they know that we're there to assist. You can help them through it, adjust lessons, shorten it, lengthen it,
enrich it... you can be very supportive to them. Often times there's a lot of materials readily available through your resource center, but unless someone helps you through it in some way you just go with what you know and you don't take the time to learn something new.

Staff Development Activities:

The team members recognized that communication was critical to use of the instructional resource package by their peers. They identified several methods of communication. The simplest method they identified was to share with peers at grade-level meetings.

Teacher #3: All 8th graders go to their exploratories at the end of the day. So I would have access to the Georgia history teachers...

Teacher #1: We have a set grade level time and I could meet with all the 4th grade teachers.

However, at least one team member noted that her school district did not provide grade-level planning time during the school day.

Another method identified by the team members was to provide a brief presentation on the instructional resource package at a school faculty meeting. This presentation could orient peers to the presence and purpose of the package and identify the teacher-participant as a resource person. Following this informational presentation the teacher-participant could speak directly to those teachers that expressed an interest in this teaching innovation.

Teacher #2: ...In our school every Wednesday there's a faculty meeting... There's an opportunity once or twice a year to present something to my faculty. And I'm not saying the entire meeting but a ten-minute snippet. ... Then [to] those teachers that are truly interested, I have these things available, you can check out a lesson or transparency, or, if I've generated an idea, you can come talk to me about it. This will generate more response than if you simply announce the kit.

Team members also suggested that communication about the instructional resource package could occur as part of a formal presentation at a school-based or district inservice session. They agreed that targeting same grade-level teachers ensured that the inservice would be most effective.

Teacher #1: Our inservices are school-based only.... If it's not something that perks me, I won't take the time to go look at it [resource package]. But if it's something where
someone has shown me something...more about it... even as you say we 've had an inservice with just fourth- and fifth- grade teachers svitching ideas and that was much more beneficial than a short, ten-minute presentation.

Teacher #2: There are school inservices [and] district-wide inservices where you would reach all fifth grade teachers within a district... here you’re impacting quite a few teachers.

Team members discussed at some length an advocacy strategy designed to excite their peers about art object-based instructional strategies and the museum as a field trip destination. This strategy called for the teacher-participant to bring a small group of three or four interested peers to the museum during an inservice or regular school day. At the museum the teacher would provide a tour of the museum to their peers and demonstrate art object-based instructional strategies in the museum galleries. The group could also view a short video presentation about the TNF-MMA initiative, which would include video footage of students interacting with works of art in the museum and in the classroom. The team members highlighted the importance of awareness in planning a field trip:

Teacher #1: ... last year when I brought my class and I'd already had a couple of workshops and I was able to discuss and talk with them about “The Price of Blood” [work of art in museum collection] once we got here. And when we got back we really were able to discuss it. Before when I brought classes here, I was just following behind the docent, trying to watch them keep their hands off the art and that was it. I wasn’t paying attention to anything and we weren’t involved in it together.

While it may be feasible for the districts to support time away from class for teachers, it was also suggested that this activity could be planned as part of an inservice day.

Teacher #2: I think that if it turned out to be that the district wasn’t fond of [the teachers’ time away from the classroom], you could look at a calendar and look at the inservice days or work days and say that we’re going to set up this program on these days and invite a few teachers with you and the Morris is open for you.

Skills Development for Implementation of Staff Development Activities:

In addition to a strong understanding of the teaching innovation and a good instructional resource package, team members agreed that presentation skills were essential for delivering presentations at faculty meetings and inservice sessions. While one team member expressed a
personal confidence about her presentation skills, others admitted a feeling of inadequacy when presenting to one's peers.

Teacher #2: *We're all teachers and we're used to getting up and speaking, but...*

Teacher #1: *But it's different with adults... I don't like it but I can do it.*

When asked for suggestions as to how teachers could develop a greater confidence in their ability to present to peers, team members suggested that a good model presentation be crafted and presented to the teacher-participants. Team members also recommended that more opportunities be provided to teacher-participants to practise their presentation skills during museum workshops.

Teacher #2: *It would be nice for them to see a presentation, maybe by people in the program who feel comfortable in giving a presentation. It helps every time someone gets up and gives a presentation or critiques a work of art. It gives a comfort zone. We should provide opportunities for people to give presentations or to see presentations by peers. They might feel more comfortable. ... I think they'll need to see what you are expecting them to do in the schools.*

**Selection of Future Trainers:**

The group interview revealed that not all teacher-participants would be willing to serve as peer trainers. While two team members stated a belief that other county teacher-participants would be willing to serve as trainers, Teacher #1 expressed concern that teachers in her district may not be willing or able to disseminate the instructional innovation.

Teacher #1: *...[The other team members] speak for their counties, but for my county I don't think they'd be as enthusiastic. ...as far as my county, one would do it and one would not. One is not in the position to do it but may help her teaching partner to do it.*
Chapter 5
Discussion and Summary

In this chapter the survey and group interview findings will be discussed. The findings will be related, where possible, to the literature review and analyzed for their contribution to the research questions of this study. The findings are reported in order of significance.

5.1 TEACHERS' CONCERN WITH IMPLEMENTATION OF THE INSTRUCTIONAL INNOVATION IN CLASSROOMS:

It is clear from the quantitative and qualitative data collected through the CFSoC survey that several teacher-participants are still primarily concerned with their personal knowledge, comprehension, and implementation of the instructional innovation. A direct interpretation of the group peak score at Stage 0 or Awareness, as attained through analysis of the quantitative data, is that the teacher-participants are not intensely concerned with change facilitation in relation to the innovation. The manual authors noted that a high Stage 0 score indicates that the facilitator currently has intense concerns about other things than the innovation being dealt with in the CFSoCQ (Hall, et. al., 1991). The qualitative data obtained through the same instrument enhance this interpretation. Eleven teachers, over half of the respondents, expressed concerns about the instructional innovation itself rather than the dissemination of the innovation to peers. This suggests that the original interpretation should be amended to suggest that the high Stage 0 score reflects the teacher-participants' concerns about their knowledge and implementation of the instructional innovation itself.

Improvement of personal teaching ability is consistent with the literature on teacher leadership (Devaney, 1987; Gehrke, 1991; Little, 1988; Rogus, 1988; Wasley, 1992). The literature on the trainer-of-trainer model also highlights that the training program must facilitate the acquisition of knowledge, comprehension, and internalization of the inservice content. Key to the success of this learning process is the employment of a sound professional development
model, such as the five-step model advocated by Joyce and Showers (1982, 1995). This model includes five major components of training: presentation of theory, modeling and demonstrations, practice in the workshop setting or under simulated conditions, structured feedback, and coaching for classroom application.

It is not unexpected to see a concern for knowledge and implementation of the instructional innovation as the CFSoCQ was administered early in the initiative’s second year. The first year of the initiative provided opportunities for the acquisition of theory and knowledge and the observation of modeling and demonstrations. Some opportunities were provided for teaching practice in the workshop setting and in the classroom. The second year of the initiative was designed to provide additional experiences in knowledge acquisition, modeling, and demonstrations; however, the majority of workshop time has been allocated to practice in the workshop setting and in the classroom. A recommendation concerning coaching will be set forth in Chapter 6.

5.2 TEACHERS’ CONCERN WITH PEER AND ADMINISTRATIVE SUPPORT

It is clear from the quantitative and qualitative data collected through the CFSoCQ that teacher-participants are concerned with peer and administrative support for their training activities. A direct interpretation of the high Stage 2 or Personal score, as attained through analysis of the quantitative data, is that the teacher-participants are uncertain about their ability and role in facilitating the use of the innovation. This score can indicate doubts about one’s adequacy as a change facilitator or trainer. It can also indicate questions about institutional support, including the degree of support to be received from superiors, nonusers and users. The increase in concern on Stage 5 also indicates some concern with coordinating with administrators or other change facilitators to increase one’s capacity to facilitate the change process. For teachers a concern with securing the support of school administrators is likely.

The qualitative data obtained through the same instrument enhances this interpretation. Five teachers expressed concerns about peer and administrator support consistent with Stage 2 of
the CFSoC. Responses addressed concerns about relationships with peers and indicated questions about support from administrators for dissemination of this innovation. This suggests that the original interpretation should be amended to suggest that the moderately high Stage 2 and 5 scores reflects the teacher-participants' concerns about peer and administrative support for dissemination activities.

Concern about the relationship with peers is predicted in the literature on teacher leadership. When a teacher steps into a leadership role, tension may emerge between this new role and the core values and norms that are associated with teaching. Lortie (1975, as cited in Hart & Bredeson, 1996) found that teachers as a group accept and enforce norms of equality, civility, and privacy. These norms can be detrimental to the practice of leadership by teachers. The egalitarian nature of teaching, for instance, does not encourage teachers to assume roles of leadership. The norm of civility can suppress peer coaching and other constructive exchanges. The practice of collegial collaboration, a hallmark of teacher leadership and educational reform, is often repulsed by the norm of privacy (Katzenmeyer & Moller, 1996).

A healthy school culture, facilitated by a supportive principal, can assist teachers in overcoming these norms and thriving as leaders and as trainers of peers. This belief is echoed in the literature (Bartunek, 1989; Ross, 1990; Vesilind & Jones, 1998; Williamson & Russell, 1990). Principals play a key role in helping coaching to flourish on-site. In addition to arranging for substitute teachers and release time for project teachers, principals can personally model desired coaching behaviours (Desrochers & Klein, 1990; Garmston, 1987). Some projects, such as the Richmond County project (Joyce, et. al, 1989), sought to build administrative support by directly engaging the principals in the training process.

While the initiative is supported by district administration, it has been unclear to what degree school-based administrators support teacher-participant activities. District-level administrators in one district recognized the need for principal support and recommended to project staff that an invitation to attend a workshop session be issued to principals of teacher-participants. Meetings were held between project staff and principals of teacher-participants
during January 2000 in an effort to increase awareness, understanding, and support of teacher activities.

Specific recommendations for building peer and administrator support for teacher-participants will be presented in Chapter 6.

5.3 TEACHERS' CONCERN WITH PERSONAL AND CLASSROOM MANAGEMENT

It is apparent from the quantitative and qualitative data collected through the CFSoCQ that teacher-participants are concerned with personal and classroom management issues. The second highest group score in the quantitative results for the CFSoCQ was Stage 3 or Management. This score indicates that concern with time, logistics, available resources, and energy involved in facilitating others in the use of the innovation is a strong focus for teacher-participants. This interpretation is corroborated by the CFSoCQ qualitative data. Three respondents addressed concerns of the limited resources of time and money and the risks of staff overload. Of note this concern did not emerge during the group interview, perhaps because this concern was not shared by the individuals in that focus group.

Concern with the limited resources of time are reflected in the literature on teacher leadership. Emergent teacher leaders maintain legitimacy as leaders by remaining in touch with life in the classroom (Devaney, 1987; Howey, 1988; Katzenmeyer & Moller, 1996; Little, 1988; Rogus, 1988; Wasley, 1992). Yet leadership tasks, such as coaching, demonstration lessons, and other classroom consultation, often demand time away from the teacher leader’s classroom. This seemingly unresolvable issue is grounded in the organizational structure of most schools, which usually limits time and access for all teachers to explore collaboration between teachers and between teachers and principals. As discussed in the earlier section on administrator support, the principal can play a key role in creating an organizational structure that fosters collegial collaboration.
The ANOVA on the variable of whether or not the teacher-participants were involved in implementing another innovation indicated that concern about management was significantly different between the two sub-groups. This variance suggests that the experience of implementing another innovation reduces concern about the personal management of this act. It could be predicted that concerns about management will reduce as implementation proceeds.

Recommendations about encouraging peer and principal support of dissemination activities will be presented in Chapter 6.

5.4 SKILLS DEVELOPMENT FOR IMPLEMENTATION OF STAFF DEVELOPMENT ACTIVITIES

A key question in this study asked what specific leadership skills would teachers require for the dissemination of the instructional innovation. The quantitative data collected through the CFSoCQ, the qualitative data collected through the group interview, and the literature on teacher leadership and the trainer-of-trainer professional development model suggest an array of skills required for the implementation of staff development activities. In particular, the qualitative data collected through the group interview provided a listing of skills perceived as relevant to this initiative. Respondents agreed that presentation skills were vital for successful presentations at faculty meetings and inservice sessions. When asked for suggestions as to how teachers could develop greater confidence in their ability to present to peers, teacher-participants recommended that more opportunities be provided to teacher-participants to practise their presentation skills during museum workshops.

Prior to the group interview, members of the program advisory team were not aware of alternative staff development methods, such as study groups, collaborative action research, or peer coaching. This lack of awareness affected the group interview discussion about skills development. Respondents clearly viewed themselves as school resource people on art object-based teaching, with resources available to loan to peer teachers, rather than as staff developers.
This perception of their role limited their understanding of the skills required for the implementation of staff development.

The literature on teacher leadership and the trainer-of-trainer model suggests particular skills useful for teachers engaged in peer assistance. Interpersonal skills are requisite to peer assistance. Scholars have identified several relevant skills, including individual diagnosis of teachers' communication needs and concern, coaching / advising, team-building, networking, conflict resolution, communication, facilitation, trust-building, and evaluation, as well as relevant knowledge, such as an understanding of the principles of andragogy, instructional improvement, and human behaviour and motivation (Kilcher, 1992; Lieberman, et. al., 1988; Zimpher, 1988). These same skills are also reflected in the trainer-of-trainer literature (Desrochers & Klein, 1990; Rach & Hoyle, 1990; Ross, 1990). Presentation skills were also mentioned as appropriate skills for trainers of teachers (Rach & Hoyle, 1990).

Specific recommendations on skills training for the development of peer trainers will be offered in Chapter 6.

5.5 INSTRUCTIONAL RESOURCES

The group interview data clearly indicated a strong desire for instructional materials to support staff development activities. When team members were first asked the guiding questions (see Appendix D), their immediate response was to request an instructional resource package that they could keep in their classroom and share with their colleagues. The need for instructional resources is supported by the literature on the trainer-of-trainer model. The literature review suggested that the peer trainer should be provided with or prepare instructional resources to support staff development efforts. The ready availability of materials was cited as essential for peer training in nearly all studies.

As to the type of instructional materials desired, team members agreed that materials should include model lessons and units prepared by teacher-participants, background information on art images, a videotape featuring teaching demonstrations in the classroom and in the
museum, and reproductions of works of art in different media, including slides, transparencies, and posters. It was also suggested that the museum provide digitized images of works of art on its Internet web site. This variety of media broadens the delivery options for teachers. The literature on the trainer-of-trainer model makes similar recommendations for resource materials. Sample instructional units, visual aids, and videotapes of teaching demonstrations were all mentioned by various authors (Joyce, et. al., 1989; Rach & Hoyle, 1990; Ross, 1990).

Not mentioned by the teacher-participants during the group interview were other support materials especially relevant for staff development activities, such as a training manual and relevant forms (Barkley, et. al., 1987; Olson & Besch, 1982; Rolheiser, et. al., 1999; Ross, 1990) or the use of external consultants in support of staff development efforts (Williamson & Russell, 1990). The absence of discussion about these materials, which are relevant to the delivery of staff development activities, belies the teacher-participants' perception of their role as peer trainers. Instead of envisioning themselves as staff developers utilizing instructional resources as a training aid, they perceive their role as informing peers about the instructional resources. This perception emerges clearly in the group interview discussion:

Teacher #2: *I think that the idea that each teacher in the program have a kit readily available through us [is good] because I think that it's important that they know that we're there to assist. You can help them through it, adjust lessons, shorten it, lengthen it, enrich it... you can be very supportive to them. ...I have these things available, you can check out a lesson or transparency, or, if I've generated an idea, you can come talk to me about it.*

This perception of their role as teacher leaders clearly differs from the trainer-of-trainer model reviewed in the literature. Specific recommendations for instructional resources will be made in Chapter 6.
5.6    TEACHERS’ CONCERNS WITH PARTICIPANT RECRUITMENT

It is clear from the response by one participant to the open-ended questions of the 
CFSoCQ that at least one if not more teachers may not be willing to continue to participate in the 
initiative or to disseminate the instructional innovation. This respondent had clearly expressed a 
disinterest in the initiative and a strong concern with the initial teacher selection and recruitment 
for this project. One member of the program advisory team expressed that at least one teacher-
participant from her school district shared a similar concern.

As noted earlier teachers were recommended for this inservice program by school district 
administrators and principals based mostly on curricular needs. Initially the project staff 
communicated directly with district administrators for recruitment of teacher-participants. Each 
district recruited teacher-participants in a manner consistent with their curricular needs and their 
organizational culture. The first district recommended the initiative to its teachers of gifted 
students but also informed other elementary-level teachers of the opportunity; teachers were 
encouraged to communicate their interest to the elementary curriculum coordinator who served 
as the district’s liaison. The second district recommended the program to its elementary and 
middle school teachers of art and social studies. Participation in the program was voluntary and 
interested teachers indicated their interest to the district’s curriculum director. The third district 
selected elementary, middle, and secondary school teachers who either served on curriculum 
development committees or were identified as teachers requiring the development of leadership 
skills. Teachers from this district were mandated to participate in this initiative. Teachers in the 
fourth district were initially informed about this opportunity by the fine arts curriculum 
coordinator. Participation, however, was completely voluntary and teachers were told to contact 
the museum directly to indicate their interest. Response from the fourth county was poor to this 
first call for participation. After the initiative’s first summer institute, the museum was granted 
permission to recruit directly for this initiative. Project staff worked with principals to identify 
and inform teachers who met the initiative criteria. Participation remained voluntary.

This mixed recruitment strategy that included some administrative pressure to participate
in the initiative is not congruent with the recommended recruitment strategies for teacher leadership and trainer-of-trainer programs. It is clear in the literature on teacher leadership that the identification and selection of teacher leaders is a primary concern. The literature suggests that future teacher leaders have more formal education and experience in curriculum development and a greater breadth of teaching experience than the average teacher (Brownlee, 1979; Lieberman, et. al., 1988; Wasley, 1991; Stone, et. al., 1997). They also have an advanced knowledge of the local context for teaching and possess strong interpersonal and communication skills (Berry & Ginsburg, 1990; Crowther, 1997; Lieberman, et. al., 1988). Teacher leaders are also distinguished by a willingness to take risks, especially to promote new ideas that might seem difficult or threatening to their peers (Lieberman, et. al., 1988). While research is limited in the area of motivation, there are studies to indicate that most teachers are motivated to assume a leadership position because of a desire to improve self, the school and/or the district, and to assist peers (Barth, 1988; Smylie, 1995; Stone, et. al., 1997; Trachtman, 1991; Troen & Boles, 1994; Wasley, 1991). Of these motivations the strongest is the desire to improve the learning of students, as Wasley’s study of teacher leaders demonstrated (1992).

The literature on the trainer-of-trainer professional development model suggests that the identification and selection of future trainers is also a key concern. Selection of future trainers should be made on the basis of criteria relevant to the desired outcomes (Ross, 1990) and must include considerations of teacher competency in and commitment to the in-service content area and expressed willingness and commitment to teach their peers (Rach & Hoyle, 1990). While some projects employed administrative recommendation as an identification tool, several projects used a formal application process (e.g. Joyce, et. al., 1989). In the projects reviewed in Chapter 2, future trainers were recruited either at the onset of an in-service program (e.g. Rach & Hoyle, 1990) or after an initial training period (e.g. Joyce, et. al., 1989).

While teacher recruitment for this initiative cannot be altered at this point, identification and selection of teacher leaders to serve as trainers in the school and districts can be implemented, following the recruitment model utilized in the Richmond County project.
discussed in Chapter 2 (Joyce, et. al., 1989). Recommendations for the recruitment of peer trainers will be presented in Chapter 6.
Chapter 6
Conclusions

This study was undertaken to prepare a design for the third-year curriculum for the National Faculty-Morris Museum of Art Professional Development Initiative. In order for teachers to act as disseminators of art object-based instructional practices and resources, the primary objective of the third-year curriculum, they must assume the role of an informal leader or change facilitator within their schools and their districts. Prior to this study, teacher concerns about this leadership task were unknown. This knowledge is crucial to the development and success of a relevant curriculum.

In this chapter recommendations for the third-year curriculum design for The National Faculty-Morris Museum of Art Professional Development Initiative are presented. The primary recommendations are:

- to provide staff-facilitated coaching to teacher-participants during the second-year program in order to lower concerns about knowledge, comprehension, and application of the instructional innovation, necessary prior to dissemination to peers;
- to introduce a peer training program with a coaching component using selected teacher-participants and school-based teams; and
- to implement program options for current teacher-participants who do not participate in the peer training program.

A detailed description of recommended actions necessary for the implementation of these primary recommendations and additional recommended actions that support the primary recommendations are provided below. The recommendations are presented in approximate order of implementation. A timeline for actions is presented as Appendix E to this study.
6.1 RECOMMENDATION: IMPLEMENT COACHING FOR CLASSROOM APPLICATION

As discussed earlier the quantitative and qualitative data collected through the CFSoc survey suggest that teacher-participants are still primarily concerned with their personal comprehension and implementation of the instructional innovation. Improvement of personal teaching ability is consistent with the literature on teacher leadership (Carr, 1997; Devaney, 1987; Gehrke, 1991; Little, 1988; Rogus, 1988; Wasley, 1992). The literature on the trainer-of-trainers model also highlights that the training program must facilitate the acquisition of knowledge, comprehension, and internalization of the in-service content. Key to the success of this learning process is the employment of a sound professional development model, such as the five-step model advocated by Joyce and Showers (1982, 1995). This model includes five major components of training, including coaching for classroom application.

Coaching for classroom application is consistent with Huberman’s open, collective cycle model of professional collaboration, the conceptual framework employed in this professional development initiative (1995). In Huberman’s model, the critical, final stage is “focused observation, demonstration, and at-the-elbow consultation while the novice runs through the successive components of the new practice” (1995, p.217). He argued that explicit counsel from external experts or from more experienced peers is essential to a teacher’s mastery of a complex instructional strategy.

For these reasons it is recommended that a coaching activity be introduced into the second-year program of this initiative. Beginning February 15, 2000, and continuing through the spring, project staff will observe and provide structured feedback on use of the instructional innovation in the classroom and in the museum. The Costa and Garmston cognitive coaching model (1994) described in Chapter 2 will be employed. This model delineates a three-stage sequential coaching process of a planning conference, lesson observation, and reflecting conference. While participation in this activity will remain strictly voluntary, teacher-participants
will be strongly encouraged to take advantage of this opportunity. Teacher-participants will be asked to indicate their interest in this activity at the winter 2000 workshop.

6.2 RECOMMENDATION: IMPLEMENT PEER TRAINING PROGRAM

It is recommended that the strategy of coaching be used to disseminate the instructional innovation within the schools. It is proposed that selected teacher-participants, known as peer coaches, recruit school-based teams of peer teachers. Presentations to peers will be the main vehicle of recruitment. Peer teachers, peer coaches, and continuing teacher-participants known as ‘master teachers’ will attend the 2000 summer institute, which will emphasize conceptual inputs (Huberman, 1995) or acquisition of knowledge about the instructional innovation. At the institute peer coaches will receive separate training in coaching skills. Master teachers will serve as faculty assistants and activity facilitators; they will share their experiences with the implementation of the instructional innovation with peer teachers, as suggested in Huberman’s model (1995).

Following the receipt of application packages from school teams by September 1, 2000, coaching will be implemented. Peer coaches, peer teachers, and master teachers will attend three one-day workshops throughout the school year. The workshops will emphasize the comprehension and application of the instructional innovation and will follow Huberman’s open, collective cycle model of developing new methods, experimentation, and exchanges (1995). Master teachers will serve as workshop faculty. More detailed information concerning this peer training program is provided below.

6.2.1 PEER COACHING OPTION

Selection of teacher-participants as trainers:

The literature on the trainer-of-trainer professional development model suggests that the identification and selection of future trainers is a key concern. Selection of future trainers should
be made on the basis of criteria relevant to the desired outcomes (Ross, 1990) and must include considerations of teacher competency in and commitment to the in-service content area and expressed willingness and commitment to teach their peers (Rach & Hoyle, 1990). While teacher recruitment for the initiative cannot be altered at this point, identification and selection of teacher-participants to serve as trainers in the school and districts can be implemented. It is recommended that the first criterion for selecting teacher-participants is an expression of interest in serving as a peer coach. The opportunity to participate in the trainer-of-trainer program option and the criteria for selection will be announced to teacher-participants shortly after the winter workshop. Teacher-participants who respond favorably to this opportunity will have met the first criterion.

Following the identification of willing teacher-participants, they will be reminded of the other selection criteria, namely the successful completion of at least one instructional unit, including field testing in the classroom and at the museum, and all art criticism assignments by March 1. Success will be measured through evaluation of the unit and assignments. The teacher-participant’s unit and assignments must meet expected standards as determined through evaluation using assessment rubrics developed by visiting scholars and project staff. Additionally, the teacher must submit a videotape of her- or him-self using the instructional innovation effectively in the classroom. Videotapes will be reviewed by project staff for evidence of successful use of the teaching innovation. Teacher-participants may request the assistance of project staff in videotaping demonstrations of teaching. To permit time for teacher-participants to prepare the videotapes, the submission deadline for this component of the peer coach application will be June 1, 2000.

The teacher-participant must also submit a letter of support from the principal. The principal must attest to the teacher-participant’s strong interpersonal and communication skills, a necessity for developing trust and rapport with others (Berry & Ginsberg, 1990; Crowther, 1997; Lieberman, et. al., 1988), and must agree to support a school team should the team be formed.
This letter of support must be submitted by March 1, 2000.

**Development of School-based Teams:**

Teachers interested in forming a team at their school and who have met the criteria may schedule a peer presentation at their school. Peer presentations may be scheduled after project staff have notified the teacher-participants of their acceptance as peer coaches; this acceptance is conditional on the submission and review of the teaching demonstration videotape. They may choose to invite peers of their choice. It will be recommended, however, that they invite peers they would choose to collaborate with on interdisciplinary, instructional units. A same grade-level, interdisciplinary team will permit collaboration on an instructional unit during the third-year program.

The peer presentation will be approximately 20 to 30 minutes in length. It will include a review of a videotape, produced by project staff, that provides an introduction to the professional development initiative, demonstrations of scholar-led activities, and classroom and field trip demonstrations by teachers. Following the videotape the teacher-participant will discuss their personal engagement with the initiative, highlighting the impact of the teaching innovation on their classroom practice and on student learning. Lastly, the teacher-participant will describe plans for the initiative’s third year, emphasizing the development of school-based teams, and will welcome peers to attend the 2000 summer institute. Project staff may be requested to assist with the peer presentations, providing an opportunity for coaching as well as reducing the personal risk for the teacher-participants.

Peers interested in attending the summer institute will register directly with project staff. Registration for the summer institute must be completed no later than June 1, 2000. Up to five teachers from each school will be accepted. In the case of a strong positive response, project staff will reserve the right to limit the number of registrants to no more than three participants per school. No commitment beyond the summer institute will be sought at this time. Teacher-
participants interested in leading a school team will attend separate sessions on coaching during the summer institute. Because of the need to engage teachers at varying levels of knowledge and experience and to provide training to peer coaches, the summer institute must be carefully planned.

Following the summer institute the teacher-participants and peers must decide whether or not to form a school team. If they decide to form a team, they will be asked to complete a formal application package. The package will consist of commitment forms to be completed by the principal, the teacher-participant, and the peer teachers. The intent of the application is to ensure the commitment of these individuals to the initiative. The submission of a commitment form will indicate the teacher-participant’s willingness to model and share their competencies with peers, a recommended selection criteria for trainer-of-trainer programs (Olson & Besch, 1983). The teacher-participant must also secure written commitment of the principal’s support for this project, including guarantees of release time for workshops and in-school coaching activities.

School teams will be allowed to have no more than three peer teachers but may have more than one teacher-participant serving as a peer coach. The limitation on the number of peer teachers is necessary to maintain a reasonable workload for the peer coaches. September 1, 2000, will serve as the deadline for school team applications for the 2000/2001 program year. All school teams will be accepted provided all required documentation has been received.

School-based Team Coaching:

Following the notification of the school team’s acceptance by project staff, the teacher-participant will initiate a coaching program for the academic year of 2000/2001. The cognitive coaching model will be employed. As described in Chapter 2, this model by Costa and Garmston (1994) consists of three stages: the planning conference, lesson observation, and reflecting conference. While using this core process, the exact form of the coaching relationship will be determined by the peer coach and individual peer teacher. As Costa and Garmston noted it is
anticipated that coaches may duplicate steps or embellish the process in order to meet an individual's unique needs (1994). It will be recommended to peer coaches that they expand the process to include peer teacher observation of the trainer using the instructional innovation in his or her classroom and at the museum, based on the stated importance of modeling in the literature on professional development. Other embellishments of the model may include demonstration of the innovation by the peer coach in the peer teachers' classrooms, a strategy described in the Stokes County study (Williamson & Russell, 1990). Dependent upon need, desire, and availability of time, school teams may opt to implement more than one coaching cycle.

The primary assignment for all teacher-participants will be the preparation and field-testing of an interdisciplinary, instructional unit. For teacher-participants currently in their third year, this will be the third unit they will have developed. Peer coaches may opt to work with their peer teachers or with other teacher-participants in the development of this unit. Peer teachers may opt to create a unit with other peer teachers or with teachers outside of their teams. This same range of options exists for teacher-participants not serving as peer coaches. While there are marked advantages to working within an existing team, this flexibility is nonetheless essential to the creation of relevant units.

Similar to the Stokes County trainer-of-trainer program described in Chapter 2, in which coaching teams met regularly with trainers for programs, all school teams, comprised of peer coaches and peer teachers, will attend three one-day workshops throughout the school year. These workshops, facilitated by project staff, will reinforce the comprehension and application of knowledge acquired during the summer institute. The primary instructors recruited for these workshops will be master teachers, teacher-participants not serving as peer coaches. However, videos, presentations by external consultants, and additional demonstrations by project staff will also be included in the workshops. Time will be alloted during each workshop for museum-based research of works of art for instructional unit development. Peer coaches will also meet to share the successes and help each other solve emerging problems associated with coaching. During the
spring 2001 workshop, opportunities will be provided to informally present summaries of instructional units as part of “sharing sessions.”

6.2.2 MASTER TEACHER OPTION

Not all teacher-participants will become peer coaches. There must be options for teachers who do not form a school-based team. Some teacher-participants may not choose to form a school-based team because of their unique personal or professional circumstances. For example, two teacher-participants are currently pregnant and expected to take leaves of absence for part of the current school year. Other teacher-participants may not succeed in their attempts to form a school-based team because they did not meet all selection criteria or were not able to secure peer or principal support.

It is recommended that a ‘master teacher’ option be presented to teacher-participants who do not or cannot pursue the development of school-based teams but wish to continue to participate in the initiative. From this group of teacher-participants the project staff will recruit workshop faculty, members of instructional resource teams, district inservice workshop faculty, and professional conference presenters. Master teachers would also be expected to attend the 2000 summer institute (with the exception of the institute’s first day, which will be attended by peer coaches and peer teachers only) and third-year workshops. They would also be expected to complete all initiative assignments, including the development and field-testing of the third instructional unit.

As a master teacher, the teacher-participant would be expected to acquire presentation skills; project staff will recruit some master teachers to serve as teaching faculty for third-year workshops. Master teachers may also be recruited as members of an instructional resource team. In this role the master teacher would be expected to contribute to the development of instructional resource materials for peer coaches. These resource materials may assume the form of on-line or ‘hard-copy’ resources. The nature of these resources will be discussed later in this
chapter. Most team activities will occur during the months of August, September, and October. As several school district administrators have expressed interest in developing introductory-level inservice workshops on this instructional innovation for other district teachers, master teachers may be asked to lead inservice workshops for these audiences. They may also be recruited to share their experiences in this initiative with colleagues at professional conferences.

6.3 RECOMMENDATION: PROVIDE VOLUNTARY WITHDRAWAL OPTION

It is recommended that the program structure be altered to allow teacher-participants to elect not to continue in the initiative. As noted in Chapter 5, some teacher-participants are participating in this initiative under duress from school district administrators. It would be counter-productive to continue to enforce participation in this initiative. Stipends currently allocated to these teachers could be redirected to members of the new school teams. It is recommended that these teacher-participants be allowed to voluntarily withdraw following the spring 2000 workshop.

6.4 ADDITIONAL RECOMMENDATIONS

In order to provide the best opportunity for a successful peer training program, some additional recommendations should be implemented. These recommendations are outlined in this section.

Skills Development for Peer Trainers and Master Teachers:

As noted in Chapter 2, skills development for implementation of a trainer-of-trainer program with a coaching component is critical to the success of the initiative. It is apparent from the discussion of the study's findings as summarized in Chapter 5 that an array of skills could be addressed in training prior to the implementation of a trainer-of-trainer program. Specifically noted was skills development in the areas of delivering presentations, individual diagnosis of
teachers' communication needs and concern, coaching, team-building, networking, conflict resolution, communication, facilitation, trust-building, and evaluation, and acquisition of knowledge about the principles of andragogy, instructional improvement, and human behaviour and motivation. Skills development in all areas noted above is impossible due to time constraints. Training emphasis will be placed on the development of presentation and coaching skills.

The following workshop session is recommended for the 2000 summer institute in order to refine presentation skills for peer coaches and master teachers:

- **Delivering a Presentation to your Peers**: The objectives of this session are to introduce teachers to andragogy and to develop teachers' presentation skills. A scholar with expertise in andragogy and training will be recruited to lead this session. As recommended by teacher-participants during the group interview process, opportunities will be provided for teachers to practise presentation skills during the initiative's second-year workshops. During the February and April workshops “sharing sessions,” during which teacher-participants will present summaries of instructional units that they have developed during the initiative, have been scheduled.

The following workshop sessions are also recommended for the 2000 summer institute in order to develop the skills and knowledge of peer coaches:

- **Introduction to Coaching**: This session will orient teacher-participants to the coaching model as outlined in Chapter 2. The ASCD videotape, *Another Set of Eyes: Conferencing Skills*, should be reviewed as a potential training resource for this session. Andragogy, or the principles and methods of adult teaching and learning, will also be reviewed in this session.

- **The Coaching Process - The Analysis / Planning Conference**: This session will review the components of the analysis/planning conference and will provide teacher-participants with the opportunity to engage in role-play conferences with each other.
• The Coaching Process - The Lesson Observation: This session will review the components of lesson observation, including the use of data-collection strategies such as audio and visual recordings and student participation (Costa & Garmston, 1994).

• The Coaching Process - The Reflection / Planning Conference: This session will review the components of the reflection/planning conference and will provide teacher-participants with the opportunity to engage in role-play conferences with each other.

A scholar with expertise and experience in the coaching process will be contracted to plan and implement these sessions, following the recommendations provided above. Only teachers serving as peer coaches will attend these training sessions.

Building Support from Peers and Principals:

It is apparent from the quantitative and qualitative data collected through the CFSocC survey that teacher-participants are concerned with personal and classroom management issues, such as time, logistics, available resources, and energy involved in facilitating others. It is also clear from the quantitative and qualitative data collected through the CFSocQ that teacher-participants are concerned with peer and administrative support for their training activities. The literature supports the data, indicating that tensions in relationships with peers may increase when a teacher steps into a leadership role (Hart & Bredeson, 1996). It is recommended that the support of principals also be secured.

Principal support can greatly reduce teacher concerns about personal and classroom management. It is recommended that several actions be undertaken to garner principals’ support of a trainer-of-trainer program. First of all, the support of district administrators should be secured for program changes and the potential enlargement of district teams. Secondly, face to face meetings will be held between project staff and principals of teacher-participants during February 2000, in an effort to increase awareness, understanding, and support of teacher
activities. Project staff will describe the peer trainer program and inform principals of the necessity to release teachers for workshop attendance and peer coaching activities during regular instructional days if a teacher team is accepted from his or her school. Substitute teachers’ fees represent a significant expense that individual schools will be asked to incur for the successful implementation of this program. The requirement to secure a written commitment of the principal’s support of this project was outlined earlier in this chapter. Thirdly, invitations will be issued to principals to attend part or all of the summer institute and third-year workshops. This invitation will be issued on the recommendation and with the support of district administrators. Finally, project staff will discuss with individual principals the possibilities for supporting and publicly acknowledging the work of peer coaches and master teachers. Ongoing principal support and acknowledgment, whether symbolic or concrete in form, is crucial to the success of the initiative from the teachers’ perspective, as suggested in the CFSoC survey and in the literature review.

Peer support is also essential to the development of effective teacher teams. Peer participation in the third-year program will be strictly voluntary. As described earlier, presentations to peers will be scheduled during the late winter and early spring of 2000. The intent of these presentations is to inform peer teachers about the professional development initiative and recruit peers to form a school-based team for its third year. Interested peers will be invited to attend the 2000 summer institute, after which they can decide as a group if they would like to form a school-based team. Information on the development of school-based teams was provided earlier in this chapter.

It is important to emphasize that this decision is strictly in the hands of the teachers. Individual commitment forms from each teacher must be received by project staff before the team is accepted into the third-year program. This group decision-making process is consistent with teachers’ professional norms of equality and civility as discussed in Chapter 5. This
voluntary approach should ensure that teacher-participants serving as coaches are supported in their efforts by peers.

**Development of Instructional Resources for Peer Training:**

As noted in Chapter 5 the study findings and literature review clearly indicated the need for instructional resources to support staff development activities. Also described in Chapter 5 was the type of resources recommended for this trainer-of-trainer program. Sample instructional units, visual aids, and videotapes of teaching demonstrations, recommended during the group interview, were all mentioned by various authors discussing the trainer-of-trainer model (Joyce, et. al., 1989; Rach & Hoyle, 1990; Ross, 1990). Not mentioned by the teacher-participants during the group interview were other support materials especially relevant for staff development activities, such as a training manual and relevant forms (Barkley, et. al., 1987; Olson & Besch, 1982; Rolheiser, et. al., 1999; Ross, 1990) or the use of external consultants in support of staff development efforts (Williamson & Russell, 1990).

The development of a variety of instructional resources to support staff development activities related to the trainer-of-trainer program is recommended. First of all, it is recommended that a videotaped summary of the initiative be prepared. This videotape will provide an introduction to the professional development initiative, demonstrations of scholar-led activities, and classroom and field trip demonstrations by teachers. This videotape will be used by teacher-participants for peer presentations. The videotape will also serve as a project document and as a fundraising tool. Footage for the videotape will be shot when possible by professional videographers under contract with the Morris Museum. Other footage shot by project staff and teachers will be used as needed. The videotape will be professionally edited and ready for use by March 15, 2000.

A variety of instructional resources should be available to teacher-participants serving as peer coaches and master teachers. As suggested by interviewed teacher-participants, a package of
materials should include a sample of relevant instructional units as prepared by teacher-participants and reviewed by the resource team as described in the section on the master teacher option. These units should include all associated resources, including worksheets, background information on works of art, et cetera. These units will serve as model examples for the peer coach and teachers as they develop their own unit, either together or separately. Reproductions of works of art in different media, including slides, transparencies, and posters, will also be provided as visual resources that the peer coach can use in lesson demonstrations and that master teachers can use during workshop sessions. A technology team, comprised of selected master teachers, will address the issue of placing these resources on the World Wide Web for use by initiative teachers and other teachers in the region and beyond. Finally, a summary of the coaching process and related documents and resources will be placed in the packet. This package will be prepared by a resource team of master teachers and will be ready for use by October 1, 2000.

6.5 IMPLEMENTATION TIMELINE

A timeline listing implementation actions is appended to this study as Appendix E.

6.6 SUMMARY

This study was undertaken to prepare a design for the third-year curriculum of The National Faculty – Morris Museum of Art Professional Development Initiative. Using the CFSoCQ, teacher-participants were surveyed to ascertain their concerns about disseminating an instructional innovation to their peers. The quantitative data collected through the survey revealed that the teacher-participants had a concerns profile typical of a group that is beginning to be involved as a facilitator of an innovation. Qualitative data collected through the survey illuminated the reasons behind the group’s concerns profile. A group interview with selected
teacher-participants corroborated the survey data and provided pragmatic recommendations on dissemination strategies and skills development. A review of relevant literature on the roles, characteristics, and required skills and knowledge of teacher leaders, professional development strategies for the development of teacher leadership, and trainer-of-trainer programs was conducted. The literature review provided a context for understanding and interpreting the research data and developing program recommendations. The recommendations included use of the trainer-of-trainer model. The recommendations produced by this study will be applied during the period beginning February 2000 and concluding April 2001.

The recommendations that resulted from the study underline the importance of considering participants' concerns in the development of an inservice program. The findings and recommendations of this study may assist educators in the curriculum design of other professional development programs for teachers and especially the process by which that can occur.

During the study, several issues emerged that are worthy of note for future investigators. While the criterion of implementing another innovation was considered in the analysis of teacher concerns, other relevant criteria, such as teaching subject and grade level, were not. The very distinctive environments of elementary, middle, and high schools and the distinctions between the teaching of 'core' subjects, such as language arts, mathematics, and science, and 'enrichment' subjects, such as art, may determine the quality of opportunities for teacher leadership activities. The correlation of these criteria to teacher concerns about leadership activities is worthy of exploration in future investigations. The relationship of district and school culture to teacher concerns about leadership has already been identified in the literature (Vesilind & Jones, 1998). While district and school culture was not the explicit subject of this study, its
influence on teachers’ concerns emerged during data collection and analysis.

As noted earlier, the review of the literature on inservice training for teacher leadership, while rich with the documentation of inservice programs accompanied by programmatic recommendations by the program designer and theoretical program frameworks, revealed little empirical investigation into this subject. As a formative study, this thesis does not contribute to empirical research into the effectiveness of inservice leadership training for teachers. Ideally, this study should be followed with an investigation into the effectiveness of this program design.
REFERENCES


January 29, 2000

Dr. Gene Hall
Dean, College of Education
William D. Carlson Education Building, Room 301
University of Nevada, Las Vegas
4505 Maryland Parkway
Las Vegas, NV 89154

Dear Dr. Hall,

I am completing a master’s thesis at the University of Toronto entitled “Teachers as disseminators of object-based learning: Curriculum development for an art museum-based, inservice program.” As you may recall from our earlier conversation last fall, I utilized the CFSoC questionnaire to determine teachers’ concerns about disseminating an object-based, instructional innovation to their peers. I would like permission to allow inclusion of the CFSoC questionnaire and the CFSoC definitions in the thesis and permission for the National Library of Canada to make use of the thesis (i.e., to reproduce, loan, distribute, or sell copies of the thesis by any means and in any form or format).

These rights will in no way restrict republication of the material in any other form by you or by others authorized by you.

The excerpts to be reprinted are from the following publication:


The excerpts are:

• Figure II.1 - “Definitions: Change Facilitator Stages of Concern” (page 17)
• Appendix A - “Sample CFSoC Questionnaire” (beginning on page 48)

If these arrangements meet with your approval, please sign this letter where indicated below and return it to me in the enclosed, stamped and addressed envelope. Thank you so much for your assistance in this matter.

Sincerely,

[Signature]
Patricia A. Moore

PERMISSION GRANTED FOR THE USE REQUESTED ABOVE:

[Signature]
[Print Name]
[Date]
APPENDIX A

Definition of Change Facilitator Stages of Concerns:

Stage 0 Awareness:
Change facilitation in relation to the innovation is not an area of intense concern. Person’s attention is focused elsewhere.

Stage 1 Informational:
There is interest in learning more about the innovation. Concern is not self-oriented or necessarily oriented to change facilitation. The focus is on the need and/or desire to know more about the innovation, its characteristics, its use and effects.

Stage 2 Personal:
Uncertainty about one’s ability and role in facilitating use of the innovation is indicated. Doubts about one’s adequacy to be an effective change facilitator and questions about institutional support and rewards for doing this job are included in this stage. Lack of confidence in self or support to be received from superiors, non-users and users are part of this stage.

Stage 3 Management:
Time, logistics, available resources and energy involved in facilitating others in the use of the innovation are the focus. Attention is on the processes of change facilitation, decreasing difficulty of change process and potential of overloading staff.

Stage 4 Consequences:
Attention on improving one’s own style of change facilitation and increasing positive innovation effects. Increasing effectiveness of users and analyzing effects on clients are focuses. Expanding own ability and style for change facilitation is also a focus.

Stage 5 Collaboration:
Coordinating with other change facilitators and/or administrators to increase one’s capacity to facilitate use of innovation is a focus. Improving coordination and communication for increased effectiveness of innovation are focuses. Issues related to involving the leaders in support and facilitating use of the innovation for increased impact are indicated.

Stage 6 Refocusing:
Ideas about alternatives to innovation are focus. Thoughts and opinions are oriented towards increasing benefits to clients are based on substantive questions about maximum effectiveness of present innovation thrust. Thought is being given to alternative forms or possible replacement of innovation.

93
Concerns Questionnaire for Change Facilitators

Name ____________________________________________________________

or

Last four digits of your Social Security No. _______ _______ _______ _______

The purpose of this questionnaire is to determine what you are thinking about regarding your responsibilities as a change facilitator for an innovation. It is not necessarily assumed that you have change facilitator responsibilities. This questionnaire is designed for persons who do not serve as change facilitators as well as for those who have major responsibility for facilitating change. Because the questionnaire attempts to include statements that are appropriate for widely diverse roles, there will be items that appear to be of little relevance or irrelevant to you at this time. For the completely irrelevant items, please circle "0" on the scale. Other items will represent those concerns you do have, in varying degrees of intensity, and should be marked higher on the scale.

For example:

This statement is very true of me at this time. 0 1 2 3 4 5 6 7
This statement is somewhat true of me now. 0 1 2 3 4 5 6 7
This statement is not at all true of me at this time. 0 1 2 3 4 5 6 7
This statement seems irrelevant to me. 0 1 2 3 4 5 6 7

Please respond to the items in terms of your present concerns, or how you feel about your involvement with facilitating (please specify the innovation). We do not hold to any one definition of this program, so please think of it in terms of your own perceptions of what it involves. Remember to respond to each item in terms of your present concerns about your involvement or potential involvement as a facilitator of the above-named innovation.

Thank you for taking time to complete this task. Please feel free to write any comments, reactions, or questions you may have about the items on the questionnaire. Also, use the last page to express any additional concerns you have about the innovation or this questionnaire.

References:

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Concerns Based Systems International
A-1

Permission was granted to reproduce this questionnaire by Dr. Gene Hall.
<table>
<thead>
<tr>
<th></th>
<th>Irrelevant</th>
<th>Not true of me now</th>
<th>Somewhat true of me now</th>
<th>Very true of me now</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I would like more information about the purpose of this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>I am more concerned about facilitating use of another innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>I would like to develop working relationships with administrators and other change facilitators to facilitate the use of this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>I am concerned because responding to the demands of staff relative to this innovation takes so much time.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>I am not concerned about this innovation at this time.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>I am concerned about how my facilitation affects the attitudes of those directly involved in the use of this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>I would like to know more about this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>I am concerned about criticism of my work with this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Working with administrators and other change facilitators in facilitating use of this innovation is important to me.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>I am preoccupied with things other than this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>I wonder whether use of this innovation will help or hurt my relations with my colleagues.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>I need more information about and understanding of this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>I am thinking that this innovation could be modified or replaced with a more effective program.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>I am concerned about facilitating use of this innovation in view of limited resources.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>I would like to coordinate my efforts with other change facilitators.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>I would like to know what resources are necessary to adopt this innovation.</td>
<td>0 2 3 4 5 6 7</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Irrelevant</td>
<td>Not true of me now</td>
<td>Somewhat true of me now</td>
<td>Very true of me now</td>
</tr>
<tr>
<td>---</td>
<td>------------</td>
<td>---------------------</td>
<td>-------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>17.</td>
<td>I want to know what priority my superiors want me to give this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>18.</td>
<td>I would like to excite those directly involved in the use of this innovation about their part in it.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>19.</td>
<td>I am considering use of another innovation that would be better than the one that is currently being used.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>20.</td>
<td>I would like to help others in facilitating the use of this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>21.</td>
<td>I would like to determine how to enhance my facilitation skills.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>22.</td>
<td>I spend little time thinking about this instruction.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>23.</td>
<td>I see a potential conflict between facilitating this innovation and overloading staff.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>24.</td>
<td>I am concerned about being held responsible for facilitating use of this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>25.</td>
<td>Currently, other priorities prevent me from focusing my attention on this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>26.</td>
<td>I know of another innovation that I would like to see used in place of this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>27.</td>
<td>I am concerned about how my facilitating the use of this innovation affects those directly involved in the use of it.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>28.</td>
<td>Communication and problem-solving relative to this innovation take too much time.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>29.</td>
<td>I wonder who will get the credit for implementing this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>30.</td>
<td>I would like to know where I can learn more about this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>31.</td>
<td>I would like to modify my mode of facilitating the use of this innovation based on the experiences of those directly involved in its use.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>---</td>
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<td>---</td>
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<td>---</td>
</tr>
<tr>
<td>32</td>
<td>I have alternate innovations in mind that I think would better serve the needs of our situation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>33</td>
<td>I would like to familiarize other departments or persons with the progress and process of facilitating the use of this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>34</td>
<td>I am concerned about finding and allocating time needed for this innovation.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>35</td>
<td>I have information about another innovation that I think would produce better results than the one we are presently using.</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

**PLEASE COMPLETE THE FOLLOWING:**

36. Male _______ Female _______

37. Age ______ 20-29 ______ 30-39 ______ 40-49 ______ 50-59 ______ 60 or over

38. What, specifically, is your current position (e.g., Dean, Regional Service Center Evaluator, Secondary School Principal)?

39. How many years have you been in your current position?

40. In total, how many years have you been in a position similar to the one you have now?

41. How long have you been involved with the implementation of the innovation you focused on for this questionnaire? Years ______ Months ______

42. Are you currently involved in implementing any other innovation? Yes ____ No ____

43. Use this space (and back of this page) to express any concerns you have not been able to indicate in the questionnaire.

44. What do you hope to learn from this workshop?

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APPENDIX C

MEMORANDUM

TO: Teacher-participants of The National Faculty - Morris Museum of Art Professional Development Initiative

FROM: Patricia Moore, Curator of Education

DATE: September 23, 1999

RE: Teacher Consent Request

As you are aware of, an important objective of this professional development initiative is for teacher-participants to disseminate art object-based learning and resources in their school and districts. Under the guidance of Dr. Carol Rolheiser and Dr. John Ross of the Ontario Institute for Studies in Education of the University of Toronto, I have prepared a research study to design a curriculum that will fulfill this objective and address your needs and concerns during the third year of this initiative. This research study will collect data about teacher participants' concerns about these tasks. It will also analyze the task of dissemination and the leadership skills required to complete this task.

By signing this consent form you agree to participate in a survey. The intent of this survey is to ascertain the concerns of teacher participants regarding the leadership task of dissemination. This survey will be administered as a written questionnaire during the upcoming October workshop and will take about twenty minutes to complete. If you are also a member of the program advisory team, your signature also indicates your agreement to participate in a group interview on October 29, 1999. The intent of this discussion is to analyze the leadership tasks and determine the required skills. The discussion will take about sixty minutes to complete and will occur during a regularly scheduled program advisory team meeting.

You will not be penalized if you decide not to participate or if you subsequently decide to withdraw from the study. After the data have been entered into the computer, all information that could be used to identify you will be removed from the records. By agreeing to participate you are giving permission for me to analyze the data. No individual information about you will be released to anyone but you (by request only). During the April 2000 workshop of the professional development initiative, all teacher participants will receive a group summary report of the teacher concerns/attitudes survey and group interview, an individualized report of the teacher concerns/attitudes survey (by request only), and a copy of the curriculum design for the third year of this initiative. I will orally review the study findings at that time.

Please check one:

___ Yes, I agree to participate in the project.

___ No, I do not want to participate in the project.

Name of teacher: ___________________________ Date: _________________

Please return this letter of consent to me using the enclosed stamped envelope. Thank you!
APPENDIX D

Guiding Questions for the Teacher Participant Group Interview:

How can object-based, interdisciplinary instructional strategies and resources be disseminated to colleagues in your district?

What strategies can teacher participants use to disseminate these instructional strategies and resources?

What skills should teacher participants have in order to use these strategies effectively?

How can the teacher participants advocate for the use of object-based, interdisciplinary instructional strategies and resources in your district?

What strategies can teacher participants use to advocate for the use of these instructional strategies and resources?

What skills should teacher participants have in order to use these strategies effectively?
APPENDIX E

Timeline for Implementation:

February 2000

- Secure approval for program changes from program planning team and school district administrators
- Conduct winter workshop on February 4 and 5, 2000; announce staff coaching activity at workshop
- Announce peer training program and program options to teacher-participants and principals
- Program officer commences staff coaching activity as of February 15, 2000
- Develop design for peer presentation

March 2000

- First instructional unit submitted by teacher-participants for review by March 1, 2000
- Receive principals’ letters of support for peer coaches
- Review art criticism assignments, principals’ support letters, and instructional units by potential peer coaches by March 15, 2000
- Produce videotape for peer presentations by March 15, 2000
- Notify peer coach applicants of their acceptance to proceed with recruitment of school teams; begin peer presentations

April 2000

- Conduct spring workshop on April 14 and 15, 2000
- Graduation of teacher-participants not continuing in the initiative

May 2000

- Conclude staff coaching activities by May 30, 2000
June 2000

- Receive new teacher applications for 2000 summer institute by June 1
- Receive videotape submissions from peer coaches

July 2000

- Conduct summer institute on July 21 and July 24 - 27; peer coaching training offered on July 21; presentation training offered to peer coaches and master teachers; master teachers assist faculty with session facilitation and instruction
- Receive second instructional unit from continuing teacher-participants

August 2000

- Form teacher technology team to develop on-line resources
- Form teacher team to review instructional units for assembly of instructional resources

September 2000

- Receive school team applications by September 1; peer coaching process begins

October 2000

- Fall workshop conducted with peer coaches, peer teachers, and master teachers in attendance; master teachers serve as primary faculty

November 2000

- Provide interim report to school district administrators

January 2001

- Provide interim report to principals
February 2001
  • Winter workshop conducted

April 2001
  • Spring workshop conducted; new teacher-participants share lessons with their peers
  • Program concludes