Lead Learner

The role of the facilitator of professional learning is one that is crucial to the impact on teacher learning and student achievement. We call the facilitator of professional learning the "lead learner" to illustrate the stance necessary for continuous learning. This lead learner could be an instructional coach, a district supervisor, a principal, an assistant principal, a teacher leader, an external partner, or anyone reading this book! Whoever is leading the learning is the lead learner.

> *When one teaches, two learn.*
>
> —(attributed to Robert Heinlein)

We have all been a part of professional learning situations when the facilitator has positioned himself or herself as an "expert," and it was clear he or she wasn't, or it became painfully apparent that the facilitator didn't have the experience necessary to push the learning deeper. As we have explored throughout the first four chapters of this book, we know there are research-based elements that support powerful learning, however, it is not through checklists of elements that true learning occurs. It's through "creating learning situations where teachers and leaders learn together" (Fullan, Hord, & von Frank, 2015, p. 7). How might we rethink the stance of those leading the learning to truly model how our profession is as much about learning as it is about teaching?

A professional learning experience could be grounded in solid theory, have a clear content focus, be of significant duration, require collective participation, and have active learning opportunities built in, yet not have an impact on teacher or student learning due to the facilitator. Research suggests that the facilitator is "crucial to the success of the professional development program" (Schifter, Bastable, & Russell, 1999; Seago, Mumme, & Branca, 2004 p. 10). Similarly, research around instructional coaching, which draws on many of the same characteristics as facilitators, suggests that the interpersonal skills of a lead learner may play a more significant role than content or pedagogical knowledge (Knight, 2004). Expert support and coaching was found to be present in many of the professional

learning studies that showed impact on teacher change and student achievement (Darling-Hammond, Hyler, &7 Gardner, 2017).

There are three important stances a lead learner must take in order for the learning to be successful:

- Communicate effectively the goals and intentions of the professional learning experience.

- Develop rapport and trust with and among those in the learning experience.

- Reframe the discourse and adjust the activities to respond to the idiosyncratic needs of particular teachers while still maintaining the goals of the professional learning experience

Being responsive to the individual needs of the participants while remaining true to the needs of the whole group and the experience is one of the most challenging tasks a lead learner faces.

We see this effort reflected in many different learning situations, not just academic contexts. Bronco Mendenhall, the football coach at the University of Virginia in Charlottesville, reflecting on this same dichotomy, said in an interview in the Daily Progress:

He then looked at Peck and Kaufusi [two football players].

I'm anxious to help another group of young men win, I'm anxious to help them grow and develop.... And I'm anxious to develop relationships. And that comes with time.

Mendenhall is conscious of meeting the needs of the whole while at the same time building relationships with each individual player.

So, how do we accomplish these lofty goals as lead learners? How do we "help another group" of educators with their learning goals while at the same time building relationships? What stance should effective facilitators of professional learning take? In order to make sure both happen, it is important to think about our work as facilitators within sessions as well as the planning that occurs before sessions. Let's start by discussing facilitation as a lead learner.

Even though I'm the coach of these two, I don't feel like that. I feel like friends. And I'm hopeful I can develop that relationship as well.

Facilitation

Our colleague, Peter Brunn, offers a list in his book, *The Lesson Planning Handbook* (2010) for teachers to consider as they facilitate student learning. While

his list is designed for students, each of these has an implication for adult learners as well:

- **Listening fully** and learning how to be a better listener

- Presenting ways to craft and deliver **open-ended questions** that probe thinking

- Exploring the **effect of our words on the learning**

Listening Fully

We start by listening fully. In the words of Peter Senge (1994), "To listen fully means to pay close attention to what is being said beneath the words. You listen not only to the 'music,' but to the essence of the person speaking. You listen not only for what someone knows but for what he or she is" (p. 377). We so often think about listening fully in the context of our instruction with students, but we often don't spend enough time listening fully during our professional learning sessions with teachers and other adults. Brunn (2010) writes about "teaching on the edge of your seat" in order to be fully present with your students. This is just as true for adult learners as it is for children in our classrooms.

In order to listen fully, we must be completely prepared for and organized for the work. Spend time beforehand thinking about the needs of the groups of adults you will be supporting. Ask yourself some of the following questions:

- Who are the adults we are working with?

- What are they interested in and curious about?

- What are their pain points?

- What brings them joy?

- What resources do they have available?

- What are their past experiences?

Then, explore how the answers to these questions might inform or change your time with participants. Are there more participants than you originally thought? If so, might you need to address the environment and add more chairs or a microphone? Are the pain points due to unwanted curriculum changes? If so, you might need to build in time for the participants to grieve and problem solve. Are the resources in the district rich or limited? Does time need to be devoted to finding resources?

> *As facilitators, we must work hard to avoid the easy temptation of filling participants' heads with our knowledge or our perceived knowledge and instead allow space for participants to discover their own knowledge.*

In addition to preparing to listen fully, we must work to listen while we are in the moment. Often, facilitators of professional learning are tasked with "delivering" information, whether it is a new curricular innovation, teaching technique, or way of work. This form of delivery often leads to very passive learning on the part of the participants.

We (authors) both have struggled with attending to the needs of our participants versus accomplishing our learning goals, albeit in slightly different ways as shown in the following vignette.

Marisa: I remember just how long it took for me to prepare for workshops or learning sessions I was delivering. I would spend days and hours reading, preparing slides, and thinking about classroom examples and work samples to showcase. In all of this preparation, there was deep learning. When it came time to share that information with others, I was ill-equipped to do much more than just "tell" my stories, my examples, and my learning. What I failed to recognize at that time was that I needed to set up experiences for the professional learning participants that mirrored the learning I was doing while I was preparing for them. We know the saying—those who are doing the work are those who are doing the learning. What is interesting to consider is that this was a significant departure from the way I planned and implemented lessons for my students. I had lost track of myself as a teacher in my role as an adult learning facilitator.

Isabel: During my first couple of years teaching, I was given the opportunity to present at a Title 1 Conference. My session was about the power of "push-in" Title 1 programs rather than the traditional "pull-out" model. I was so excited about the work and came ready to share all the research out there on how ineffective traditional pull-out models were. The room was full of very experienced Title I teachers who had been implementing a pull-out model for years, and the research I shared only made them angry. I wasn't prepared for their frustration. Hindsight is 20/20, of course, and I know now that I failed to take into consideration who my audience was and what their pain points were. Had I attempted to get some information from my participants at the start of the session (or even spent time reflecting on who might be in the audience), I might have been able to address their frustration or worry more successfully.

Open Ended Questions

When we are listening fully, we realize when we need to take a step back or push thinking forward. One way to consider pushing thinking is through open-ended questions and probing.

A consideration is that when we are situated in a familiar context, it is often difficult to really see beyond what is at the surface. That is where carefully crafted questions on the part of the facilitator take the learning deeper and might enable the facilitator to more closely meet the needs of the participants.

We know that powerful professional learning consists of situating the learning within the participants' own context, whether that is through the use of observation, coaching, or student work samples.

Consider the following questions that could be used when debriefing a video or observation of classroom practice:

- What did you notice about the students' thinking or behavior?

- What techniques did the teacher use to support student learning?

- What evidence do you have that the lesson goals were met?

- What in the lesson planning allowed _____ to happen?

- What did _____ tell you about student thinking?

Each of these questions allow for learners to consider many points of view and build upon each other's thinking. Through the use of questions such as these, facilitators have the opportunity to truly consider the direction to take the learning, decide where to probe further, and how to redirect thinking if necessary. These questions can be found on the protocol called Preparing for and Debriefing a Demonstration Lesson (Appendix 13).

Probing learners' thinking and making considerations for how to deepen their learning is somewhat of an art form. Very similar to a classroom situation, participants in professional learning often think there is a "right" answer.

Through the use of open-ended questions, we begin to change the course of the learning and shift the tone from "a room of novices learning from an expert" to one in which all are learners.

Consider the following responses to probe thinking:

- Say more about that.

- Why do you think that?

- How is your comment different than _____?

- What do others think?

Responses and probes support learners in deepening their knowledge beyond the surface-level responses that often bubble up immediately. At first, participants might not be used to such a learning environment. As a lead learner, building a community and creating a sense of trust are foundational to any subsequent rigorous work, hard conversations, or deep dives into content. Therefore, the language we use as facilitators is paramount.

Effect of Our Words on the Learning

Many of us have been in learning contexts where we knew we were not safe to take a risk. Some facilitators are seen as such an expert that participants would never consider raising a different perspective. In some professional learning situations, there is a feeling of complacency in the room—everyone is just waiting for the session to be over. The language the facilitator uses in any learning session sets the tone for the learning that is going to take place. In order for the session to be productive, educators must feel like they are in a safe environment for taking risks and that all ideas are valued. One way facilitators can promote this environment is through the use of neutral responses. Take the following scenario as an example:

Ashley was facilitating a grade-level professional learning community meeting where the teachers were planning for an upcoming unit of instruction. The focus was on the comprehension strategy of visualizing.

Ashley: Let's take a minute to think about what visualizing does to help students in their comprehension of text. Who might start the conversation?

Elizabeth: Well, I think it's really about making mental images of what the author has written.

Ashley: Great! Who else?

{Silence}

Ashley: Ok. So now let's look through the lessons in the unit and talk about the texts chosen for visualization.

Now consider this alternative to the same scenario:

Ashley: Let's take a minute to think about what visualizing does to help students in their comprehension of text. Who might start the conversation?

Elizabeth: Well, I think it's really about making mental images of what the author has written.

Ashley: Thank you. What do others think?

Michael: I think it's about making mental images, but I also think it's really important to connect those images to the words the author has used.

Ashley: Say more about that, Michael.

Michael: Well, sometimes, when the kids draw mental images, they just draw really basic stuff and don't really consider the tone that the author is using or really think in a sophisticated way about the words. I think this is a place where we need to put some emphasis in this unit. They're in third grade now. Their mental images and visualizations should be deeper.

Ashley: Thank you. Who thinks something different than what Michael and Elizabeth have shared?

Amanda: I'm not sure that it's different, but I think visualizing really helps kids get the nuances that an author is trying to convey. For example, word choice. When an author chooses certain words, she means to convey certain images. I'm not sure that the kids always get that.

As the facilitator, Ashley posed the question about how the strategy of visualizing helps students comprehend text deeper. She wanted to ensure that the teachers had a baseline understanding of how the strategy works. In the first scenario, when Elizabeth offered her thinking, Ashley said "Great!" and the conversation ended. The teachers felt like the "right" answer had already been given. Although Ashley tried to open the conversation up for more responses, the teachers were not necessarily willing to engage further because it seemed as though the question had been answered. The second scenario really illustrates the power of not only neutral response (notice that Ashley simply responded with "thank you" to each person) but also probing for more information. The conversation in the second scenario really allowed the teachers to consider their teaching of visualizing at a much deeper level.

We have discussed the power and importance of building relationships with individual participants and the moves we make as facilitators to establish trust. Let's think about structuring the professional learning so that it addresses the needs of the whole group. Planning is key!

Planning

When planning for professional learning, we must think deeply about our instructional needs and goals—both the big and often year-long picture as well as any shorter more specific learning sessions. In order to meet the needs of the

whole group, consistently attending to our instructional goals is critical. Effective professional learning plans make time and space during the learning cycle to reflect on what the goals are and determine if the learning activities are supporting our work in accomplishing the goals. Thoughtful leaders help their teams to think deeply about where they are as a group in their learning and where they want to be after a year of learning together. Then, the learning is designed so that it addresses all of the goals.

Most importantly, spending time determining our initial question, topic, or goal before planning for the professional learning helps define what that learning looks like and ensures that our goals are met. During this planning time, meet with others to determine what it is they want and need to learn more about—creating a needs assessment—so that we can begin with the end in mind. It is important to ask, What data do we need to help make a decision about our professional learning goals? Is it student literacy assessment data? Do we need a teacher survey based on interest and perceived need? Should we also use our classroom walk through data to determine needs?

Coherence between what we learn from our needs assessment and the professional learning opportunities is imperative. Once the goals are determined, then we discuss and refine them for the learning— thinking about both the content we are exploring and the participants' enthusiasm for the experience.

One process tool that we have used to support both our big picture thinking for district level learning as well as coaching sessions with individual teachers is the Plan, Do, Study, Act model (or PDSA) developed by Walter Shewhart and Edward Deming (Moen & Norman, 2009). This learning cycle contains four continuous and recursive steps: plan, do, study, act—all designed to support constant reflection and the willingness to adopt or support ideas and practices that are either working or not working. The PDSA model is a simple but effective protocol for groups or individual learners to use to explore learning or change over time.

PLAN

The first stage of the PDSA model involves intensive planning. During this phase, participants identify a goal or a purpose, formulate an idea, define what success might look like, and begin to put the plan into action. Of course, there are many topics a group might decide to explore. For example, is the goal to learn more about how to teach students to write persuasively? Perhaps as a group of literacy leaders in a district we want to support our teachers to think more deeply about how to effectively instruct students to write opinion pieces. To this end, during the planning phase of the PDSA cycle, we might draft a semester-long plan with six components that looks something like this:

1. An introductory face-to-face session on the power of argument writing and a sharing of professional resources on opinion writing

2. An expectation that all teachers in our learning cohort will teach an opinion writing unit over the next several weeks

3. A check-in virtual session in the middle of the unit to address any questions that teachers might have

4. Another face-to-face session at the end of the unit to score individual student work with a common rubric

5. A closing virtual session to debrief the experience of learning together

6. A Google survey to better understand what the cohort group of teachers might need next.

As we begin to think more specifically about some of the specific sessions, we might reflect on the following questions:

- What are the participants interested in and curious about?

- What are their pain points? What brings them joy?

- How will you use the information you gather during the initial question to frame the conversations?

- How can you help participants see learning through their students' eyes?

- What research or professional reading might you provide that supports your approach and will help to build theoretical knowledge?

- How will you support you participants in a call to action at the conclusion of the PDSA cycle?

Once the plan is nailed down, begin to focus on the logistics. Decide who will do what and when and what your timeframe is.

DO

Now, it is time to actually carry out the plan. During the second stage of the PDSA model, the plan is implemented. Throughout this stage, take detailed observational notes and gather a wide variety of data to help determine if the strategies and activities are working to support the both the collective and individual teacher learning.

STUDY

The study phase of the model involves observing and learning from the consequences of our activities. Outcomes are explored and decisions are made about the plan's success or failure, or some combination of the two. We might ask ourselves questions about the experiences like the following:

- Was our instructional content rich enough?

- Did we meet the needs of both the group as a whole as well as the individual participants?

- Is the cohort still enthusiastic about the work? If not, how can we address this?

- What do the data from the student writing samples tell us?

- When we go back to our initial meeting brainstorm and goal setting to compare what we have done with what our initials goals were, what did we accomplish?

- What did we learn from our Google survey? What are our next steps?

ACT

Once we have made sense of our learning, then we determine what modifications should be made to the plan. Now, we act on what we have learned. The act phase closes the recursive cycle and integrates the learning. We can adjust our goals, change our methods, brainstorm new ideas, or broaden the learning to a larger group. Based on the conversations, we determine next steps. Do we need to modify the plan for next year's new cohort of teachers? Do we need to do more—was a semester experience enough? If so, what might we do next based upon our data? What does this group want/need now? What might our next steps be? Are there more data we still need to collect?

The PDSA cycle can be repeated over and over again as part of a never-ending cycle of continuous learning and improvement. As the lead learners, it is imperative that we strive to see the big picture—what does this learning look like over the course of time?—before we think about the details and address the needs of the individual learning sessions. The PDSA model supports this thinking and pushes us toward reflection. We must think about both aspects of the learning, the big picture and the small details, in order for sustained growth to occur. Consider the following examples of the PDSA in action:

PDSA *Framework*: Grades 2 and 3 Vocabulary Instruction Through Interactive Read Alouds

PLAN

Participants:

- 3 elementary literacy specialists

- 6 lead teachers from Grades 2 and 3

- Central office coordinators

Goal: *Explore students' vocabulary acquisition during whole group interactive reading lessons*

Timeline: September-January

Tasks: Lesson study experiences using interactive read aloud lessons with an emphasis on vocabulary as well as comprehension

DO

Conduct three lesson study cycles (October, November, December) focused on vocabulary instruction within interactive read aloud lessons.

STUDY

After reviewing the data from each cycle, we determined that we lacked a deep understanding of effective vocabulary instruction ourselves. The following important questions we explored:

- Did the students learn and use the words in the conversations or writing?

- Do we have a bank of strategies for teaching vocabulary that are effective?

ACT

- Partner with the local university and offer several courses on literacy instruction to support elementary teacher knowledge

- Explore different instructional programs for teaching vocabulary

- Purchase several professional books on vocabulary acquisition and instruction for the literacy facilitators in the buildings to facilitate book groups

PDSA *Framework for an Instructional Coaching Cycle*

PLAN

Participants:

- *MS instructional coach*

- *MS intervention teacher*

Goal: How do we keep students on track and engaged during intervention instruction?

Timeline: February-March

Tasks: Lesson observations and feedback, instructional conversations between coach and teacher

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DO

- Instructional coach will observe during three intervention periods and script the moves the teacher makes.

- Coach and teacher will meet after each meeting and determine one activity they might try during the next observation to help keep students engaged.

STUDY

- After reviewing the data from each observation, we realized that the students were much more engaged when cooperative structures were in place in the classroom.

ACT

- The intervention teacher decided to partner with another teacher in the district to think more about using cooperative structures in their classrooms and what that might look like.

- The instructional coach and teacher were going to meet monthly to touch base and see what was working.

The PDSA framework allows you to consider the plan of action in a clear, coherent, and action-focused manner. In many ways, the PDSA framework mirrors the inquiry stance discussed in Chapter 4. This framework can be used for coaching cycles (as illustrated in the previous example) or in much larger planning contexts. A tool to support your work using the PDSA cycle can be found in Appendix 15.

Once you feel confident that the larger plan has been addressed, we offer a list of ten questions that will be useful to help you think about your work as a lead learner when planning for any work you might support with learning teams. Each of the questions is linked to the research-based characteristic discussed earlier in the book. Keep in mind that it is through the connections and inter-actions that powerful learning takes place.

QUESTIONS TO ASK WHILE PLANNING

QUESTIONS	CONNECTIONS AND CONSIDERATIONS
1. What are the goals for this learning session? Are there goals related to the larger goals of the district's learning plan? Are my goals the same as the goals of the group? How can we set the stage for learning by all sharing our hopes and intentions for the session?	These questions help us consider alignment and duration in our work.
2. What do I want this group to think and feel by the end of our time together?	Content focus as well as a focus on social and emotional needs supports the end goals.
3. What might their disposition be? What do I know about their emotional state? Do I anticipate the teachers will need to release emotions? If so, how can we do this productively?	Understanding the interpersonal nature of our colleagues help us consider the active learning experiences we might suggest or use.
4. What do I anticipate might be challenging for them? How can I prepare for this and support them with these challenges?	Support others by being prepared and flexible.
5. How can I involve them in this conversation? How can I make it matter to them?	Ownership is crucial to motivation.

6.	Are there any materials (articles or tools) that I might gather and bring with me to support either their knowledge or emotions?	Conceptual inputs play a large role in the depth of the learning. The focus and learning of any professional learning experience must be based on solid theoretical foundations.
7.	What team-builder exercise will I use to start the conversation?	Begin the conversation immediately in order to create a trusting environment.
8.	What will the flow and the timing of the session look like? How will each session build on the next, or how does this session fit with the larger learning goals?	Think through time beforehand.
9.	How will we get to next steps? When during the session do we need to move toward determining next steps?	Never leave without next steps.
10.	How do I want to feel at the end of this learning opportunity?	As the lead learner, consider how you will know your goals have been met or how your own learning has been supported through the experience.

You will want to listen not only for what your participants know *but also for who they* are *as human beings.*

This tool is available for your use in Appendix 16. Thinking about these questions beforehand and always keeping in mind the importance of listening fully to the learners you are responsible for (in one way or another) is imperative to the success of the learning.

Just as importantly, be aware of the effect of your words on the learning of the participants by being intentional about presenting ways to craft and deliver open-ended questions that probe thinking.

Hopefully we have offered much for you to think about in terms of your role as a lead learner in the professional learning situation. Our stance as the lead learner is critical—we must respond to the needs of the individuals as well as the needs of the whole group. Throughout the learning experience, we have to strive to communicate the goals and intentions effectively. And, all the while, we must work to develop trust and rapport with participants. Let's see this in action with a vignette Marisa shares about working with a group of principals in a district:

I was recently facilitating a session with a group of principals around providing powerful feedback to teachers as a part of their teacher observation model. The district had been working with their teachers for several years on shifting from a more traditional, teacher-directed way of instruction to a facilitative stance. Significant work had been done in helping teachers understand a different stance and how that impacted student learning.

While working with this group of principals, it became apparent that while they were encouraging a new stance in their teachers, they themselves did not embody that same stance when they were in the role of supporting the teachers' professional learning. Through careful questioning and discussion, the principals realized that their language and stance communicated to their teachers the very didactic model they were asking their teachers to move away from. In our work together, we spent time analyzing the questioning and feedback techniques the teachers were learning and using with their students and applying them to the feedback and discussion cycles the principals were having with their teachers.

This experience illuminated for me, as the facilitator of this learning, just how important it is to listen carefully to the experiences of the learners in the room and connect for them the work that they are doing across initiatives. Because I was familiar with their goals for their teachers, I was able to align the work and push these principals to the very learning that would make the biggest impact on their practice as educators.

Questions for Reflection

- What does it mean for you to be the lead learner in a room of teachers?

- What is the most effective stance to take when facilitating new learning? Why? What might you need to work on when you become the lead learner?

- How will you effectively plan for your teachers' implementation of new learning? How will you consider the bigger professional learning system that you are building in your district?