As patterns emerge, winning strategies seem clear

Schools and districts determined to change have shifted their attention and resources for big initiatives to the important implementation phase, demonstrating a growing sophistication in using underlying principles of change to design results-driven professional development. Reading between the lines of recent published success stories, as much as 75% of staff development resources are being spent on the follow-up, or implementation phase, of successful initiatives. In addition, milestones and frequent progress checks figure prominently in the plethora of stories of highly successful professional development published in recent issues of *JSD* and other educational journals (Black, 2001; Burnette, 2002; Cawelti, 2001; Deojay & Novak, 2004; French, 2001; Heller, Daehler, & Shinohara, 2003; Norton, 2001; Pardini, 2004; Reddell, 2004; Schmoker, 2002).

Not long ago, far fewer success stories were published. Equally important, the main story was not about implementing change, and patterns of strategic implementation moves were not nearly so evident. Even a few years ago, most professional development efforts were guided only by broad goal statements, milestones were rarely mentioned in planning documents or used as indicators of impact, and follow-up activities had a bad reputation. Professional development consisted mostly of sporadic large group learning events with no commitment or plan to move forward or determine how the new information affected students’ learning. Adding follow-up activities for staff often seemed contrived and confusing. With no milestones or other markers to guide staff developers, the purpose of follow-up activities was sometimes ambiguous, regardless of how creatively or earnestly the activities were carried out. Staff developers often had to stretch to give a rationale for any follow-up to isolated learning events in which the adult learners had played a passive role without expecting “next steps.”

THE POWER OF MILESTONES

Successful schools and districts offer useful lessons for what to anticipate when undertaking change and how to deal with nearly universal challenges. One notable challenge is that most long-range goals take so much time to reach that even the best intentions falter. Those involved in an initiative often lose focus, the momentum slows, and follow-up activities get off course or stray down a different path. Successful schools and districts use milestones to keep follow-up activities purposeful and focused on the road ahead.

Milestones are the interim checkpoints or accomplishments that mark progress toward the major long-term results. For example, the milestone at the end of the first six months of a high school’s writing initiative might be that “all departmental teaching teams assess student writing assignments with a common rubric.” Later on, another milestone would likely be that students have successfully achieved a passing score on a district or state exam.

While in the phase of developing the professional development plan for each initiative, leaders should agree on milestones. Milestones built from consensus and widely communicated at the outset as important checkpoints to be measured along the way (whether each semester, quarterly, or annually) deliver the message that the whole initiative is purposeful, focused, and results-driven. Milestones also help make the long-range goals less overwhelming for those charged with motivating others to change.

Milestones continue to be useful for decision making throughout implementation. Milestones can be used to drive decisions about which follow-up activities will best help staff learn, which will help staff collaborate on solving everyday problems, and which follow-up will help build the momentum needed to ensure that a critical mass of staff and students gains competence in the desired area.

FOLLOW-UP CHOICES AND ONGOING CONVERSATIONS

Follow-up, when I was a novice staff developer, was considered a swampy wilderness with no clear path to follow, and no guideposts or road signs along the way. Tales of bad follow-up experiences were common conversation among trainers, coaches, facilitators, principals, curriculum coordinators, and other leaders charged with helping educators change their daily practices in schools and districts. A seasoned staff development leader typically advised novices, “Follow-up is a danger zone. Tread lightly for fear...
of getting bogged down, waylaid, entangled in the morass of innumerable and unanticipated challenges that you will find in a school and teams and classrooms. Regardless of what you do, even with incentives, someone is always unhappy with the follow-up.”

Because of the array of follow-up possibilities, it is difficult to design follow-up that suits everyone and hits the mark. One lesson learned repeatedly: Planning for follow-up cannot be done in a vacuum by the principal or the curriculum coordinator or even the professional development committee. Follow-up that is a surprise or is done by an outsider on his or her schedule, regardless of how well-meaning, frequently runs into resistance and lackluster participation.

Follow-up, especially activities that occur during the workday and in the workplace, gets very personal. Follow-up impinges on how individuals process information, how they create mental maps of new information, and how they manage their own skill development and take charge of personal changes in their work patterns (Nevills, 2003). Successful follow-up, then, tends to be planned with staff members’ involvement so staff members and school leaders feel ownership. For follow-up to be successful, significantly contributing to teachers implementing new practices, success stories tell of offering staff choices on when, where, and with whom they will pursue their learning.

While one teacher may eagerly seek a weekly, ad hoc, problem-solving breakfast dialogue with other teachers, another might prefer working closely with one colleague to collaboratively plan lessons using the new approach. Another teacher may keep an implementation log or engage in e-mail dialogue with an outside consultant, while a small group of teachers in the same school or district may wish to undertake action research on the topic in conjunction with their graduate courses. And all of these teachers need to be able to shift into new follow-up activities as they reach milestones and their particular needs for support change.

Nearly all success stories refer to the importance of informal, ongoing conversations throughout implementation. The isolation that professional educators experience in schools’ tightly controlled schedules makes change particularly difficult. In isolation, it’s much easier to maintain familiar routines than to take on new and sometimes questionable approaches. Not surprisingly, teachers trying to implement changes in their routines benefit from frequent opportunities to talk with each other about the work, without a script or agenda (Sparks, 2003). An important lesson from schools and districts where change has been successful in recent years is that time to talk is a critical resource — talk without a script or agenda to solve the problems of reaching milestones using the new strategies with students.

CHECKING PROGRESS ON MILESTONES

While milestones are essentially an evaluation device to gauge progress, they contribute to a change initiative in various ways. Systematically gathering formal and informal data on the next milestone on the calendar can help everyone involved make meaning of how the initiative’s various strategies fit together. Depending on the long-term indicators of impact or the particular initiative’s target, a range of formative data can be useful in gauging progress.

Formative data can be collected formally or informally and need not be collected from every teacher, every classroom, or every student. A careful sampling of data often can provide sufficient evidence to ensure that the milestone is within reach or can provide the specific information enabling those leading the initiative to alter the next phase of follow-up activities (Champion, 2002).

One important point about collecting formative data: Avoid a data collection frenzy. A variety of data is useful in checking progress as the initiative marches toward each milestone. However, a mountain of “just-in-case” data is not a good investment of time or energy and sends a negative message. You may decide you need to check progress with classroom walk-throughs, student observations, team meeting records, team plans or other artifacts, anecdotal stories, samples of student work, local assessment scores, student portfolios, daily records of student use of the media center, or records of teachers volunteering to demonstrate lessons for colleagues on the new approach, but it is important to prioritize and be strategic about the data you collect along the way (Champion, 2000). Collect only the data you really need; then use all of the data you collect to figure out which follow-up activities are adding value or contributing, which follow-up should be altered or eliminated, and what must happen next to keep the initiative on track to reach the milestone ahead. Ultimately, each milestone provides a clear indicator of impact.

Milestones, follow-up choices, talking, and checking progress are some of the important indicators that the field of professional development has shifted attention to the implementation phase of change. Implementation used to be a scary swamp where the whole effort gets bogged down. Success stories teach us about taking small steps together with some pauses to pay attention to important markers along the way.

REFERENCES


Continued on p. 72
Continued from p. 80

(or Mr. Laundry), doing the laundry is part of the work that goes on in the context of the house, along with paying bills, washing dishes, cleaning, hanging fans, and so on.

Effective professional development is sustained over time. It is not done in one-shot workshops, and it is not done using the same method every time. Just like you-know-what. Different temperatures, load sizes, additives. It changes each time. You know the old saw, “Insanity is doing the same thing over and over and expecting different results.” Unfortunately, that has been our approach to changing teaching practices for most of recent history. It’s embarrassing that we hadn’t noticed its ineffectiveness long ago. Actually, a few people did. It’s just taken about 30 years for enough of us to notice the research and do something about it.

So those of you engaged in trying to change practice to improve the achievement of students should take note of NSDC’s Standards for Staff Development, study the research on personal and organizational change, stop planning one-shot workshops decontextualized from the needs of your students and teachers, and stop pulling folks away from their other work. Stop hanging fans, and start doing the laundry!

---

Taking measure / ROBBY CHAMPION

Continued from p. 70


