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Build a bridge between workshop and classroom

Follow-up activities put training into practice

By Joan Richardson

A little more than 20 years ago, Bruce Joyce and Beverly Showers put the concept of “follow-up” into the tool box of staff developers after they said their research had shown that much of the initial learning was lost unless a structured follow-up program followed it.

Yet, two decades later, follow-up is still not routinely included as part of staff development activities or planning. So serious is the oversight that one observer has even suggested that “staff development without follow-up is malpractice.”

The federal No Child Left Behind legislation may change this. Merely spending money on staff development will not be sufficient when NCLB requires educators to point to the results of their work. Researchers widely agree that there will be no such benefit without structured follow-up as part of staff development.

Both the adult learners and staff development leaders bear responsibility for ensuring that what is learned is later used in practice. “All teaching is for transfer and all learning is for transfer. The

mission of sound professional development experiences is to extend learning, to bridge the old and the new, and to lead teachers toward relevant transfer and use across academic content,” said Robin Fogarty, a consultant who specializes in transfer of training.

Fogarty, who has written a new book on transfer, believes staff development leaders and providers can incorporate concepts into professional learning that will aid with follow-up. If staff developers keep these issues in mind during every workshop or training session, they can prepare participants to walk back into their schools better prepared to use what they have learned.



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1. Learn about transfer of training.

Broadly, Fogarty said there are two kinds of transfer: simple transfer and complex transfer.

Simple transfer occurs when what teachers are learning is very close to what they will be expected to teach in their classrooms, she said. For example, science teachers might attend a science workshop in which they are learning a variety of experiments

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Follow-up activities put training into practice

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that they could use with students. They might practice those experiments themselves in preparation for guiding students to do the same work.

Examples of more complex transfers of training, however, occur when what teachers are learning in the training situation seems far removed or remote from the work they do in the classroom, she said. For example, when teachers are learning about infusing sophisticated thinking skills, such as inference, into lessons, the transfer is more remote. It is harder to build a “bridge” (Perkins and Salomon, 1988) between that skill and the content that teachers will be teaching to students. Fogarty described this example: “At a workshop, the skill of inference might be demonstrated and practiced in a language arts example. But the chemistry teacher, the physical education teacher, and the American history teacher are all expected to transfer the inference skill into their specific content. What that looks like for each of them can be quite different.” See the chart on Page 3 for some examples of strategies for “hugging” and “bridging.”

2. Set expectations for the transfer.

Setting expectations for transfer has the same power as setting goals for any task, Fogarty said. “When an administrative assistant attends a day of software training, the expectation is that she will come back to the office and use the software immediately in her work setting. Traditionally, teachers have had no such mandate regarding formal professional development experiences. They often attended a workshop and returned to their school with no obligation or expectation that they would use or even share the information,” she said.

One easy way for trainers to set expectations during any workshop is through verbal prompts, Fogarty said.

- “You will leave here today with a number of practical ideas that you will be able to use immediately. Keep your eyes

open for ideas that will work for you.”

- “Keep asking the question, ‘How might I use this in my classroom?’ Share your ideas with others to see what they think.”

- “You have my word. I guarantee that you will leave with ideas that you can use. If you are having a challenge seeing the connection to your students or your content, please give me a signal and we’ll work through some ideas together.”

3. Model with authentic artifacts.

Staff developers can assist with transfer by modeling examples of how the skill or strategy has been used in practice. Fogarty said trainers can prepare for this by collecting artifacts in advance from teachers who are using the ideas across various content areas.

During a workshop, Fogarty also suggested that staff developers do “show and tell” to spark ideas for relevant transfer. “Seeing that others have applied the ideas helps teachers see ways they can use it in their classrooms too,” she said.

“Push teachers to start an application by targeting a topic they will encounter soon in their curriculum. The more specific the transfer conversations, the more likely that transfer will actually occur,” she said.

4. Reflect metacognitively.

Fogarty said there are six levels of transfer — overlooking, duplicating, replicating, integrating, strategizing, and inventing. Having participants reflect individually about their own level of transfer will aid in their understanding of the process. It will also encourage them to push themselves to find other ways to transfer what they are learning, she said. (See Page 4.)

5. Plot an application.

Throughout the workshop, teachers can record their ideas for applying what they are learning. Fogarty uses a small journal created by folding an 8½-by-11

sheet of paper into a booklet small enough to fit into a pocket. Rather than filling up random sheets of paper, teachers leave with a document that they can return to again and again. The booklet becomes their takeaway ideas prompt.

Expand this by having teachers collaborate to brainstorm ideas for application. Direct them to record those ideas as well, perhaps with a note about who suggested the idea in case the teacher wants to reconnect with that person after the workshop.

6. Try something immediately.

When teachers return from a workshop, they should try what they have learned as soon as possible. Although staff developers can provide guidance during a workshop, individual teachers bear the responsibility of actually using what they have learned.

“The sooner teachers use a new ideas, the better the chances are that it will become part of their teaching repertoire. That’s why it’s helpful to have teachers discuss possible transfer ideas in the training setting before they leave,” Fogarty said.

To encourage this, Fogarty said trainers can get participants to commit to a colleague or a peer partner that they will try something the day after they return from the workshop. “Having them focus on an application idea as part of the workshop may be all they need to seal their commitment to try what they’ve learned,” Fogarty said.

7. Discuss with lead-ins.

Finally, Fogarty suggested that staff developers provide prompts for discussion. These prompts “create mindful connections because they lead teachers to think ahead to some possible applications and to think back to applications they might have used if they had known about these ideas earlier,” she said. (See Page 5.)

“The most important thing we can do is to send teachers off with an expectation that they will take what they learn and use it. If we just pay attention to it, that’s one way to make sure it happens,” Fogarty said.

Hugging and bridging strategies for transfer

HUGGING	BRIDGING
<p>The workshop provides a learning experience that resembles the expected application of the learning. Teachers are involved in an application similar to the application they would be expected to use in practice.</p>	<p>Teachers are expected to make conceptual links between what they are learning in workshops and how they will apply that learning to their classrooms. They will generalize from what they have learned and reflect on its potential application.</p>
<p>1. Setting expectations. Alert learners to situations where they can apply what they are learning directly to their work.</p>	<p>6. Anticipate applications. Ask teachers to predict possible applications for what they have learned.</p>
<p>2. Matching. Adjust the learning so it is almost the same experience as the intended application of the learning.</p>	<p>7. Generalize the concepts. Ask teachers to generalize from their experiences to produce widely applicable principles, rules, and ideas.</p>
<p>3. Simulation. Use simulation, role playing, acting out to approximate the intended application of the learning.</p>	<p>8. Using analogies. Engage teachers in finding and elaborating an analogy between a topic they are studying and something that is different from that topic.</p>
<p>4. Modeling. Demonstrate rather than just describe or discuss.</p>	<p>9. Parallel problem. Engage teachers in solving problems that have parallel structure in two different areas to gain an understanding of the similarities and differences.</p>
<p>5. Problem-based learning. Have teachers learn content they are supposed to use in solving problems by solving similar problems.</p>	<p>10. Metacognitive reflection. Prompt and support teachers as they plan, monitor, and evaluate their own thinking about what they learned.</p>

Adapted from *How to Teach for Transfer* by Robin Fogarty, David Perkins, and John Barell (Palatine, Ill.: Skylight Publishing, 1992) and "Ten Tools for Teaching for Transfer," a document posted at learnweb.harvard.edu/alps/thinking/docs/10tips.htm.

Reflect Metacognitively

Comments to facilitators: This activity will assist participants in understanding their current level of transfer. It is recommended that this activity be paired with the “Discussion With Lead-Ins” activity on Page 5.

Time: 20 to 30 minutes.

Directions

Invite participants to reflect privately on their past practice with transferring what they have learned in staff development experiences. Ask them to record those reflections in a transfer notebook they have created during the workshop or in another journal.

Do I ?

Overlook? Miss appropriate opportunities, overlook, persist in former ways?

Duplicate? Perform the drill exactly as practiced, use it with no changes, copy?

Replicate? Tailor to my content, customize, apply in similar situations?

Integrate? Combine with other ideas and situations, use with a raised consciousness?

Strategize? Carry the strategy or idea to other content, bridge, associate, map?

Invent? Innovate, take ideas beyond the initial concept, risk, diverge, invent?

Source: *A look at transfer: Seven strategies that work*, by Robin Fogarty. Chicago: Robin Fogarty & Associates, in press.

Discussion With Lead-Ins

Preparation: Write the lead-ins on chart paper and post in the front of the room so that all participants can see.

Time: 20 to 30 minutes.

Directions

Invite each participant to select a partner for a discussion about transfer. Instruct each pair to discuss and complete each sentence. Encourage them to discuss as well as to write their responses in their transfer notebooks or another journal.

Overlook Think of an instance when the skill or strategy would be inappropriate.
*“I would not use _____
 when _____.”*

Duplicate Think of a recent opportunity when you could have used the skill or strategy.
*“I wish I’d known about _____ when
 _____ because I could have _____.”*

Replicate Think of an adjustment to your application of _____ to make it more relevant to your content or students.
“Next time, I’m going to _____.”

Integrate Think of an analogy for the skill or strategy that clarifies the idea.
*“_____ is like _____
 because both _____.”*

Strategize Think of an opportunity for upcoming classes to use the new idea.
*“In _____, I’m going to use _____
 to help _____.”*

Innovate Think of an application for a real-life setting, beyond the workshop.
*“Outside of school, I could use _____
 when _____.”*

Source: *A look at transfer: Seven strategies that work*, by Robin Fogarty. Chicago: Robin Fogarty & Associates, in press.

Help Group

Comments to facilitators: This activity will help participants think more deeply about what they are learning and how they might transfer that learning to classroom use.

Time: 45 to 60 minutes.

Directions

1. Designate a time keeper.
2. Divide into groups of three or four.
3. One group member takes three to five minutes to present a problem or ask a question about implementation.
4. Going clockwise around the circle, the other group members offer potential solutions to the problem or answers to the question. The presenter listens and may take notes. The presenter may ask clarifying questions about the suggestions but otherwise does not interact or evaluate the recommendations.
5. After group members have offered their comments or made their recommendations, the presenter describes to the group what he or she will do upon returning to his or her school.
6. Repeat each step with another group member until all members have had an opportunity to present and respond.



Source: "Follow-up: The key to training for transfer," by Joellen Killion and Brenda Kaylor, *Journal of Staff Development*, Winter 1991 (Vol. 12, No. 1).

“ The development of a skill by itself does not ensure transfer; relatively few teachers, having obtained skill in a new approach, will then transfer that skill into their active repertoire and use the new approach regularly and sensibly unless they receive additional information. ... The conditions of the (work setting) are different from training situations: One cannot simply walk from the training session into the (work setting) with the skill completely ready for use — it has to be changed to fit the (work setting) conditions. ”

— Joyce and Showers, 1982, p. 5.

Resources for transfer

A Look at Transfer: Seven Strategies That Work

Robin Fogarty. Chicago: Robin Fogarty & Associates, in press.

Expands on Fogarty's seven strategies. Available through her web site, www.robinfogarty.com.

"Making Workshops Work for You"

Joan Richardson, *Tools for Schools*, April/May 1999.

Entire issue of *Tools for Schools* devoted to ensuring that what educators learn in workshops and conferences is put into practice in their schools. Main article is available online at www.nsd.org/library/tools/tools4-99rich.html. The entire issue is available online in the area of the web site reserved for comprehensive NSDC members.



"Teaching for Transfer"

David Perkins and Gavriel Salomon, *Educational Leadership*, 46 (1).

Written primarily about student learning, Perkins and Salomon's ideas apply to adult learning as well.

"Follow-up: The key to training for transfer"

Joellen Killion and Brenda Kaylor, *Journal of Staff Development*, Winter 1991 (Vol. 12, No. 1).

Describes four techniques for follow-up that were used successfully in two Colorado school districts.

"Life After Training: A Look at Follow-Up"

Adele Wenz and Cynthia Adams, *Journal of Staff Development*, Winter 1991 (Vol. 12, No. 1).

Describes the work of one school district in trying to ensure appropriate follow-up to workshop training.

"The Coaching of Teaching"

Bruce Joyce and Beverly Showers, *Educational Leadership*, 40(1).

Introduces the concept of follow-up as essential to implementation of learning.

Student Achievement Through Staff Development (3rd ed.)

Bruce Joyce, Beverly Showers, and Michael Fullan. Alexandria, VA: ASCD, 2002.

A comprehensive guide to staff development that provides both the research base and practical guidelines for implementing effective professional learning for teachers and principals.

Schedule changes for NSDC Annual Conference

As you make your plans for the NSDC Annual Conference in New Orleans, please note a change in the schedule for the final day of the conference.

Conference participants will be provided with a continental breakfast outside the concurrent session rooms from 7:30 to 8:30 a.m. before proceeding to the K sessions that morning. The K sessions run from 8:30 to 10:30 a.m.

After the K sessions end, conference participants will be provided with a light brunch followed by a lighthearted and uplifting keynote from Wavelength.

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Ask Dr. Developer



Dr. Developer has all the answers to questions that staff developers ask.

(At least he thinks he does!)

Share the learning with others

Q *I try very hard to send a team of teachers to workshops, conferences, and other opportunities that I think will benefit them and our students. They always come back saying they've learned a lot but I see little evidence that they've actually implemented much of what they tell me they learned. I'm beginning to think that I shouldn't spend the money on such things anymore. What else can I do?*

A You sound like a lot of principals I've talked with. But don't give up just yet!

You have made a great decision in sending teachers to each of these experiences as a team. I encourage you to continue to do that.

Before the next team goes, however, ask them how they will use what they will learn. Your first and best approach is to have the participants identify for themselves how they will apply or share what they have learned. Merely raising the question about how they will do that signals your expectations. Be prepared to brainstorm with them about various op-

tions.

Here are some possibilities:

- Share with one other teacher in the same grade level or department.
- Make a presentation to the next staff meeting regarding what they learned at the workshop or conference.
- Prepare a set of lesson plans for all teachers to use.
- Model a lesson based on what they learned at the workshop or conference and invite all interested teachers in their building to observe.
- Prepare a videotape of a model lesson that could be shared with all teachers in the district.
- Create an ongoing study group on the topic that was the subject of the conference or workshop.
- Write about what they learned for the school, staff, or district newsletter.

After a while, the message will get around that staff development is not a day away from school. It's a valuable opportunity that comes with a commitment to share with others and to transfer that learning into practice. That's a lesson worth paying for!

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