TOOLS INDEX

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14.3	Change facilitator style profile	Use the questionnaire and profile to help in setting professional goals that will help ensure change is successful.
14.4	Levels of use	Understand where staff are in using a new strategy or system effectively.
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14.6	*A Playbook for Professional Learning* activities	Distinguish the characteristics of professional learning that achieves different levels of impact.
14.7	Data analysis connects staff learning to student performance data	Ensure alignment between adult professional and learning student achievement needs.
14.8	Goal setting system	Help teams decide goals based on the district's and school's learning agenda and decide how to best learn the strategies and systems for achieving those goals.

TOOL 14.1

Template for designing professional learning

PURPOSE
Ensure a thoughtful, research-based approach to designing the learning agenda.
TIME
2 months for research, study, design, reflection, and revision
MATERIALS
• Hirsh, S. & Hord, S. (2012). *A Playbook for Professional Learning.* Oxford, OH: Learning Forward. • Current research on adult learners • Essential Considerations chart • Information on Learning Designs standard (http://learningforward.org/standards/learning-designs#.U6olXhZYVg0) and videos from Learning Forward's website on the Standards • Easton, L. B. (Ed.). (2008). *Powerful designs for professional learning* (2nd ed.). Oxford, OH: NSDC.

STEPS	
1.	Appoint a leadership team to study professional learning, adult learning theory, and powerful designs for professional learning.
2.	Determine a goal for the team.
3.	Establish a time for the team to meet to explore ideas and study. The team needs sufficient time to develop deep understanding of professional learning, adult learners, and designs for professional learning. Members may want to examine other organizations' professional learning agendas.
4.	Create a summary of what the team learns.
5.	Use the Essential considerations chart or adjust it based on what the team learns to establish a learning design.
6.	Reflect on the work, share it with others to get feedback, make adjustments, and implement it with fidelity.
7.	Modify the learning agenda as the team assesses how the work is changing teacher and leader practices.

TOOL 14.1 *cont'd*

Essential considerations

Essential considerations	Learning systems/ designs	Theories/principles to support the proposed system or processes	System for monitoring progress, celebrating successes, making corrections in our pathway, and giving precise feedback
Goals What student learning goals do we intend to impact through this learning agenda/design? What goals are we establishing for adults?			
Skills/attitudes/ behaviors What new skills, attitudes, and behaviors do we want to see? How clearly have we articulated what staff need to learn and why?			

TOOL 14.1 *cont'd*

Characteristics of adult learners What factors should be considered when selecting learning designs? Which learning designs actively engage learners?			
Theory of change What will ensure that all learn and that staff fully and successfully use the new skills, attitudes, and behaviors?			
Implementation design How do we ensure that learning communities are authentically developing a deep understanding and using the strategies effectively?			

TOOL 14.2

Stages of concern

PURPOSE
Ensure district and school leaders are aware of the Stages of Concern of those engaging in professional learning in order to differentiate the experiences based on the concerns.
TIME
• 15 minutes to take the survey • Time to examine the data and design the professional learning
MATERIALS
• Stages of Concern chart • Stages of Concern questionnaire

STEPS	
1.	Determine who will be part of the professional learning.
2.	Have them fill out the survey.
3.	Analyze the data to determine teachers' stage of concern.
4.	Use the results to determine a design.

TOOL 14.2 *cont'd*

Stages of concern chart

CATEGORY	STAGE	LABEL	DESCRIPTION
Impact	6	Refocusing	Focuses on exploring broader benefits from the change, including the possibility of major alterations or adaptations.
	5	Collaboration	Focuses on coordinating and cooperating with others regarding the change.
	4	Consequences	Focuses on how the change is affecting students, which student outcomes are influenced, and which adaptations might be necessary to improve results.
Task	3	Management	Focuses on the processes and tasks involved in applying the change and the best use of information and resources. Attention centers on efficiency, organization, management, scheduling, and time demands.
Self	2	Personal	Focuses on the demands of the change and adequacy in meeting those demands. Attention centers on role in the change process, the reward structure, decision making, and potential conflicts with existing structures and personal commitments.
	1	Informational	Focuses on learning more detail about the change. Although unworried about personal involvement in the change, attention centers on gaining more information about substantive aspects of the change, such as general characteristics, effects, and requirements for use.
Awareness	0	Awareness	Little concern about or involvement with the change indicated.

Source: Adapted from Guskey, T. (2000). *Evaluating professional development*. Thousand Oaks, CA: Corwin Press.

TOOL 14.2 *cont'd*

Stages of concern questionnaire

Name (optional): _____

The purpose of this questionnaire is to determine what people who are using or thinking about using various programs are concerned about at various times during adopting a new practice.

The items were developed from a range of typical responses of school and college teachers, from those who had no knowledge about various programs to those with many years of experience using them. Therefore, **many of the items on this questionnaire may appear to be of little relevance to you at this time.**

For items that are irrelevant to you, please circle "0" on the scale. Other items will represent concerns you do have in varying degrees of intensity and should be marked accordingly 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 *this* innovation. We do not hold to any one definition of the innovation, so please use your own perception of what it involves. Phrases such as "this approach" and "the new system" all refer to the same innovation.

Remember to respond to each item in terms of your *present concerns* about your involvement or potential involvement with the innovation.

Thank you for taking time to complete this task.

TOOL 14.2 *cont'd*

1.	I am concerned about students' attitudes toward the innovation.	0 1 2 3 4 5 6 7
2.	I now know of some other approaches that might work better.	0 1 2 3 4 5 6 7
3.	I am more concerned about another innovation.	0 1 2 3 4 5 6 7
4.	I am concerned about not having enough time to organize myself each day.	0 1 2 3 4 5 6 7
5.	I would like to help other faculty use the innovation.	0 1 2 3 4 5 6 7
6.	I have a very limited knowledge of the innovation.	0 1 2 3 4 5 6 7
7.	I would like to know the effect of reorganization on my professional status.	0 1 2 3 4 5 6 7
8.	I am concerned about conflict between my interests and my responsibilities.	0 1 2 3 4 5 6 7
9.	I am concerned about revising my use of the innovation.	0 1 2 3 4 5 6 7
10.	I would like to develop working relationships with both our faculty and outside faculty using this innovation.	0 1 2 3 4 5 6 7
11.	I am concerned about how the innovation affects students.	0 1 2 3 4 5 6 7
12.	I am not concerned about the innovation at this time.	0 1 2 3 4 5 6 7
13.	I would like to know who will make the decisions in the new system.	0 1 2 3 4 5 6 7
14.	I would like to discuss the possibility of using the innovation.	0 1 2 3 4 5 6 7
15.	I would like to know what resources are available if we decide to adopt the innovation	0 1 2 3 4 5 6 7
16.	I am concerned about my inability to manage all that the innovation requires.	0 1 2 3 4 5 6 7
17.	I would like to know how my teaching or administration is supposed to change.	0 1 2 3 4 5 6 7
18.	I would like to familiarize other departments or persons with the progress of this new approach.	0 1 2 3 4 5 6 7

TOOL 14.2 *cont'd*

19.	I am concerned about evaluating my impact on students.	0 1 2 3 4 5 6 7
20.	I would like to revise the innovation's approach.	0 1 2 3 4 5 6 7
21.	I am preoccupied with things other than the innovation.	0 1 2 3 4 5 6 7
22.	I would like to modify our use of the innovation based on our students' experiences.	0 1 2 3 4 5 6 7
23.	I spend little time thinking about the innovation.	0 1 2 3 4 5 6 7
24.	I would like to get my students excited about their part in this approach.	0 1 2 3 4 5 6 7
25.	I am concerned about time spent working with nonacademic problems related to the innovation.	0 1 2 3 4 5 6 7
26.	I would like to know what using the innovation will require in the immediate future.	0 1 2 3 4 5 6 7
27.	I would like to coordinate my efforts with others to maximize the innovation's effects.	0 1 2 3 4 5 6 7
28.	I would like to have more information on the time and energy the innovation will require.	0 1 2 3 4 5 6 7
29.	I would like to know what other faculty are doing in this area.	0 1 2 3 4 5 6 7
30.	Currently, other priorities prevent me from focusing on the innovation.	0 1 2 3 4 5 6 7
31.	I would like to determine how to supplement, enhance, or replace the innovation.	0 1 2 3 4 5 6 7
32.	I would like to use student feedback to change the program.	0 1 2 3 4 5 6 7
33.	I would like to know how my role will change when I am using the innovation.	0 1 2 3 4 5 6 7
34.	Coordinating tasks and people is taking too much of my time.	0 1 2 3 4 5 6 7
35.	I would like to know how the innovation is better. than what we have now	0 1 2 3 4 5 6 7

TOOL 14.2 *cont'd*

Please complete the following:

1. How long have you been involved with the innovation, not counting this year?

Never ___ 1 year ___ 2 years ___ 3 years ___ 4 years ___ 5 or more ____

2. In using the innovation, do you consider yourself to be a:

Non-user ___ Novice ___ Intermediate ___ Old hand ___ Past user ____

3. Have you received formal training regarding the innovation (workshops, courses)?

Yes ____ No ____

4. Are you currently in the first or second year using another major innovation or program?

Yes ____ No ____

If yes, please describe briefly:

Thank you for your help!

TOOL 14.3

Change facilitator style profile

PURPOSE
Use the questionnaire and profile to help in setting professional goals that will help ensure change is successful. Knowing how those they lead perceive leaders helps leaders make decisions about their leadership skills.
TIME
• 10 minutes to take the survey • Several hours to analyze the data and use the findings to design professional learning for school leaders
MATERIALS
• A copy of the questionnaire for each participant
STEPS
1. Have participants take the survey.
2. Use the questionaire and profile to help in setting professional goals and learning that will help leaders ensure change is successful in their organizations.
CLUSTER 1: CONCERN FOR PEOPLE
Scale 1: Social/informal • Is friendly when we talk to him or her • Is primarily concerned about how teachers feel • Places a high value on being accepted by teachers • Makes a priority of attending to feelings and perceptions • Chats socially with teachers
Scale 2: Formal/meaningful • Discusses school problems in a productive way • Shares ideas for improving teaching and learning • Questions teachers about what they are doing in their classrooms • Supports teachers when it really counts • Takes the lead when problems must be solved

TOOL 14.3 *cont'd*

CLUSTER 2: ORGANIZATIONAL EFFICIENCY
Scale 3: Trust in others • Seems to be disorganized at times • Introduces plans and procedures at the last moment • Allocates resources in a disorganized way • Explores issues using a loose structure • Delays making decisions until the last moment
Scale 4: Administrative efficiency • Spells out procedures and rules • Keeps everyone informed about procedures • Provides guidelines for efficient operation of the school • Runs the school efficiently and smoothly • Organizes resources and schedules
CLUSTER 3: STRATEGIC SENSE
Scale 5: Day-to-day • Proposes loosely defined solutions • Has few concrete ideas for improvement • Knows very little about programs and innovations • Has an incomplete view about the future of the school • Focuses on issues of limited importance
Scale 6: Vision and planning • Knows a lot about teaching and curriculum • Is heavily involved with teacher and student experiences • Uses multiple sources to learn about the new program or innovation • Sees the connection between day-to-day activities and the long-term goal • Has a clear picture of where the school is going

TOOL 14.3 *cont'd*

Change facilitator style questionnaire

		1 Never or Not True	2 Rarely True	3 Seldom True	4 Sometimes True	5 Often True	6 Always or Very True
1.	Is friendly when we talk to him/her	**1**	**2**	**3**	**4**	**5**	**6**
2.	Knows a lot about teaching and curriculum	**1**	**2**	**3**	**4**	**5**	**6**
3.	Procedures and rules are clearly spelled out	**1**	**2**	**3**	**4**	**5**	**6**
4.	Discusses school problems in a productive way	**1**	**2**	**3**	**4**	**5**	**6**
5.	Seems to be disorganized at times	**1**	**2**	**3**	**4**	**5**	**6**
6.	Shares many ideas for improving teaching and learning	**1**	**2**	**3**	**4**	**5**	**6**
7.	Introduces plans and procedures at the last moment	**1**	**2**	**3**	**4**	**5**	**6**
8.	Keeps everyone informed about procedures	**1**	**2**	**3**	**4**	**5**	**6**
9.	Is involved in teacher and student experiences	**1**	**2**	**3**	**4**	**5**	**6**
10.	Proposes loosely defined solutions	**1**	**2**	**3**	**4**	**5**	**6**

TOOL 14.3 *cont'd*

		1 Never or Not True	2 Rarely True	3 Seldom True	4 Sometimes True	5 Often True	6 Always or Very True
11.	Is primarily concerned about how teachers feel	**1**	**2**	**3**	**4**	**5**	**6**
12.	Asks questions about what teachers are doing in their classrooms	**1**	**2**	**3**	**4**	**5**	**6**
13.	Has few concrete ideas for improvement	**1**	**2**	**3**	**4**	**5**	**6**
14.	Provides guidelines for efficient operation of the school	**1**	**2**	**3**	**4**	**5**	**6**
15.	Supports teachers when it really counts	**1**	**2**	**3**	**4**	**5**	**6**
16.	Allocates resources in a disorganized way	**1**	**2**	**3**	**4**	**5**	**6**
17.	Runs the school efficiently and smoothly	**1**	**2**	**3**	**4**	**5**	**6**
18.	Uses multiple sources to learn more about the new program or innovation	**1**	**2**	**3**	**4**	**5**	**6**
19.	Places a high value on being accepted by teachers	**1**	**2**	**3**	**4**	**5**	**6**
20.	Sees the connection between day-to-day activities and the long-term goal	**1**	**2**	**3**	**4**	**5**	**6**

TOOL 14.3 *cont'd*

		1 Never or Not True	2 Rarely True	3 Seldom True	4 Sometimes True	5 Often True	6 Always or Very True
21.	Knows little about programs or innovations	**1**	**2**	**3**	**4**	**5**	**6**
22.	Is skilled at organizing resources and schedules	**1**	**2**	**3**	**4**	**5**	**6**
23.	Has an incomplete view of the school's future	**1**	**2**	**3**	**4**	**5**	**6**
24.	Makes a priority of attending to feelings and perceptions	**1**	**2**	**3**	**4**	**5**	**6**
25.	Explores issues using a loose structure	**1**	**2**	**3**	**4**	**5**	**6**
26.	Chats socially with teachers	**1**	**2**	**3**	**4**	**5**	**6**
27.	Delays making decisions until the last possible moment	**1**	**2**	**3**	**4**	**5**	**6**
28.	Focuses on issues of limited importance	**1**	**2**	**3**	**4**	**5**	**6**
29.	Takes the lead when problems must be solved	**1**	**2**	**3**	**4**	**5**	**6**
30.	Has a clear picture of where the school is going	**1**	**2**	**3**	**4**	**5**	**6**

TOOL 14.4

Levels of use

PURPOSE
Understand where staff are in using a new strategy or system effectively.
TIME
A period of several months—several weeks to thoughtfully develop the interview questions to determine an individual's levels of use, time to analyze the data and determine findings, and time to use the findings to design powerful professional learning experiences differentiated to meet learners' needs.
MATERIALS
• Levels of Use survey

STEPS	
1.	With the levels of use chart and CBAM materials from www.sedl.org, design interview questions that determine users' levels of use of the initiative.
2.	Decide on a system for analyzing the data effectively.
3.	Design differentiated professional learning based on the findings.

TOOL 14.4 *cont'd*

LEVELS OF USE SURVEY	
USERS	
VI	**Renewal:** State in which the user re-evaluates the quality of use of the innovation, seeks major modifications of or alternatives to present innovation to achieve increased impact on client, examines new developments in the field, and explores new goals for self and the system.
V	**Integration:** State in which the user is combining his or her own efforts to use the innovation with related activities of colleagues to achieve a collective impact on clients within their common sphere of influence.
IVB	**Refinement:** State in which the user varies the use of the innovation to increase the impact on clients within immediate sphere of influence. Variations are based on knowledge of both short- and long-term consequences for clients.
IVA	**Routine:** Use of the innovation is stabilized. Few if any changes are being made in ongoing use. Little preparation or thought is being given to improving innovation use or its consequences.
III	**Mechanical use:** State in which the user focuses most effort on the short-term day-to-day use of the innovation with little time for reflection. Changes in use are made more to meet the user's needs than the client's needs. The user is primarily engaged in a stepwise attempt to master the task required to use the innovation, often resulting in disjointed and superficial use.
NONUSERS	
II	**Preparation:** State in which the user is preparing for first use of the innovation.
I	**Orientation:** State in which the user has recently acquired or is acquiring information about the innovation and/or has recently explored or is exploring its value orientation and demands on the user and user system.
0	**Nonuse:** State in which the user has little or no knowledge of the innovation, no involvement with the innovation, and is doing nothing toward becoming involved.

Source: Loucks, S. F., Newlove, B. W., & Hall, G.E. (1975). *Measuring levels of use of the innovation: A manual for trainers, interviewers, and raters.* Austin, Texas: University of Texas.

TOOL 14.5

Developing
an Innovation Configuration map

PURPOSE	
Clarify what the innovation looks like when it is in place, and declare progress along the path to proficiency.	
TIME	
At least three 45-minutes sessions	
MATERIALS	
• *Tools for Schools*. (2004, October/November).	
PROCESS	
1.	Establish a team to develop the innovation configuration, and be willing to seek feedback and support the efforts to achieve the goals.
2.	Clarify what an Innovation Configuration map is and the process and purpose for developing it.
3.	Follow the steps for development as outlined in *Tools for Schools*.
4.	Seek input and feedback from the larger community.
5.	Make modifications based on input.
6.	Begin the implementation journey.

TOOL 14.5 *cont'd*

Tools For Schools™

A bi-monthly publication supporting student and staff learning through school improvement

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NATIONAL STAFF DEVELOPMENT COUNCIL
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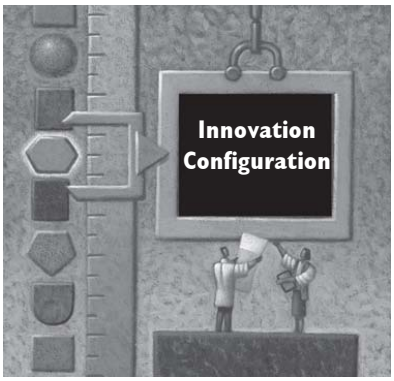
Taking measure

Innovation Configurations gauge the progress of a new initiative

BY JOAN RICHARDSON

When 2,500-student Madison Parish School District in Louisiana prepared to introduce a new reading curriculum, members of the reading cadre first developed an Innovation Configuration (IC) map.

Members of the reading cadre talked about what they believed the new instruction should look like in practice. Then they talked with teachers who were actually implementing the curriculum. "Then, we worked together to develop the configuration," explained elementary supervisor Patricia Candler.



Madison's reading IC details how teachers are expected to use standards to develop lessons, use data to guide their instruction, design appropriate assessments, and group students.

"It is very specific. It helps the teachers do a bit of self-evaluation so they know what they should be doing and what they should not be doing. It helps the principal know what to look when he's doing observations," Candler said.

An Innovation Configuration (IC) map clarifies what a new program or practice — the innovation — is and is not. It creates a vision of what the new program or practice looks like in use. Rather than dealing with an abstraction, an IC map makes very concrete what the expectations are for implementation of a new program or practice. NSDC recently used IC maps to create clear pictures of how the NSDC Standards for Staff Development look in practice.

In the same way, educators could use IC maps to measure the implementation of new math curriculum, use of cooperative learning strategies, differentiation strategies in classrooms, or any other program or practice.

"We know that people get very muddled ideas of what a change is all about. ICs help people understand the new parts," said Shirley Hord, scholar emerita at the Southwest Educational Development Laboratory in Austin, Texas and one of the original developers of ICs. Hord is also co-author with Pat

Continued on Page 2

TOOL 14.5 *cont'd*

Tools For Schools October/November 2004

Innovation Configurations gauge progress

Continued from Page 1

Roy of NSDC's book, *Moving NSDC's Staff Development Standards into Practice: Innovation Configurations* (NSDC, 2003).

"There are two things that stall us in the change process. One is being very fuzzy about what we want and what this new thing looks like when we have it in place. The second is the failure to have leadership that pushes and supports and helps get where we want to go," she said.

An Innovation Configuration map is a tool that can help address both of those issues. Because an IC map makes clear what's expected, teachers are more likely to implement a new program or practice in a consistent way. The clarity of the IC maps means leaders have an easier time identifying when and where to provide the push and support required to nudge educators towards the ideal implementation of a new program or practice.

Hord believes the individuals who will be expected to implement the innovation should also develop the IC maps for it. For example, if the innovation is a new mathematics curriculum for elementary school, the classroom teachers who will be teaching that new math should be the ones who develop the IC map. Even when a school district is buying a commercial program, Hord urges districts to take the time to have their own staffs develop an IC to guide its implementation.

"The most powerful part of the IC is that it brings the group together to discuss it and debate it. As they do that, they are clarifying what this thing is," she said.

There are generally seven steps in the creation of an IC map:

Step #1. Visualize and brainstorm the components of the new program or practice. (See tool on Page 3.)

If teachers were developing an IC for cooperative learning, for example, they might identify the major parts or components of that initiative as grouping patterns, tasks for students, individual accountability, group skills, interdependence, and group processing. (See Page 5 for a completed IC on cooperative learning.)

Step #2. Within each of the components identified in Step 1, visualize and brainstorm the ideal behavior of key individuals — principals, teachers, students. (See tool on Page 3.)

For example, if grouping patterns is one of the components, the ideal might be having teachers assign all students to four-member groups.

Step #3. Within each of the components identified in Step 1, visualize and brainstorm any unacceptable behavior of key individuals — principals, teachers, students.

For example, using grouping patterns again, not grouping students for learning would be unacceptable behavior.

Step #4. Generate variations for each component, essentially filling in the gap between the ideal behavior and the unacceptable behavior.

For example, using grouping patterns, variations would include assigning students to three-member groups or assigning students to work only with a single partner.

"There is no magic number for the number of variations," Hord said. Some components may have only three variations; some as many as six.

Step #5. Rewrite each variation, using an action verb to begin each sentence and describe behavior of the key individual, such as the teacher or principal.

Assume that each sentence begins with the phrase, "The teacher ..."

For example, "The teacher assigns students to four-member groups," rather than "students in four-member groups."

Step #6. Using the tool on Page 4, write the variations from left to right, with the most ideal variation on the far left and the most unacceptable variation on the far right.

Hord favors the left-to-right arrangement because it places the ideal variation in the most prominent location for a reader. Although each component may have a different number of variations, all of them will have an ideal variation.

Step #7. Again using the tool on Page 4, draw lines to show users the ideal behaviors, the acceptable behaviors, and the unacceptable behaviors.

In her work, Hord uses a solid line to distinguish between the ideal and the acceptable and a dashed line to distinguish between the acceptable and the unacceptable. If you are working with colored markers, select a different color for each line.

Once developed, ICs can be used in a variety of ways. They can guide goal-setting for a new program or practice. Teachers and principals can determine where they are in the map and create a clear picture of where they want to be, even assigning a target date for getting there. If a principal determines that a teacher or teachers are stuck at a certain point along the continuum, she has the information to determine what professional development might help teachers move towards the ideal.

An IC map for a new math curriculum, for example, could also be used to help parents understand what to expect in their child's classroom.

Teachers can use an IC map for self-evaluation by asking themselves where they fall along the path from "ideal" to "unacceptable."

When evaluating teachers' implementation of a new program or practice, Hord recommends interviewing teachers about their work rather than providing them with a survey to fill out. "People tend to respond on surveys the way they think you want them to respond," she said. In an interview, a principal or staff developer can probe more deeply to determine the reality of how the innovation is being implemented, she said.

As much as educators talk about the difficulty of change, Hord said few schools have actually embraced ICs as a tool that could help them.

TOOL 14.5 *cont'd*

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Identify components of an innovation

Copy this page for each member of the group creating the Innovation Configuration. Be prepared to write the components and variations on a large piece of chart paper or on a whiteboard that can be seen by all members of the group.

Step #1. Visualize and brainstorm the major parts or components of the new program or practice.

Step #2. Within each of the components, visualize and brainstorm the ideal behavior by key individuals — principals, teachers, students. Those are "variations."

Step #3. Within each of the components, visualize and brainstorm the unacceptable behavior by key individuals — principals, teachers, students. Those also are "variations."

Step #4. Generate more variations for each component, essentially filling in the gap between the ideal behavior and the unacceptable behavior. Some components may have only three variations; others could have up to six.

COMPONENT 1:	COMPONENT 2:	COMPONENT 3:	COMPONENT 4:	COMPONENT 5:
Variation:	Variation:	Variation:	Variation:	Variation:
Variation:	Variation:	Variation:	Variation:	Variation:
Variation:	Variation:	Variation:	Variation:	Variation:
Variation:	Variation:	Variation:	Variation:	Variation:
Variation:	Variation:	Variation:	Variation:	Variation:

TOOL 14.5 *cont'd*

Tools For Schools October/November 2004

Map an Innovation Configuration

Directions: Using action verbs, describe each component and each variation. Place the ideal variation in the #1 position and the most unacceptable variation in the #5 position. Place the other variations in between. When every component and variation have been written into the appropriate location, draw a solid line to separate the ideal variations from the acceptable and a dashed line to separate the acceptable from the unacceptable variations.

Component 1:				
1	2	3	4	5
Component 1:				
1	2	3	4	5
Component 3:				
1	2	3	4	5
Component 4:				
1	2	3	4	5
Component 5:				
1	2	3	4	5

— — — — — — — — Variations to the right are unacceptable; variations to the left are acceptable.
_____ Variations to the left are ideal.

TOOL 14.5 *cont'd*

Completed Innovation Configuration map

for a cooperative learning initiative

Component 1: Structures groups				
1 Assigns students to four-member groups		**3** Assigns students to groups larger than four	**4** Assigns students to work with only one partner	**5** Does not assign students to groups
Component 1: Structures tasks				
1 Explicitly defines tasks and criteria for success as all group members accomplish the task	**2** Explicitly defines tasks and criteria for success as most group members accomplish the task	**3** Explicitly defines tasks and criteria for success as some group members accomplish the task	**4** Specifies no criteria for success	**5** Specifies no task
Component 3: Assures individual accountability				
1 Selects any or all group members to answer for the group and/or gives individual tests to each student	**2** Repeatedly selects those who typically answer correctly	**3** Fails to solicit answers from ethnic/minority students or girls	**4** Permits one student to complete tasks and answer for the group	
Component 4: Develops group skills				
1 Explicitly states, monitors, rewards group or social skills expected during the task	**2** States and monitors group skills expected to be exhibited	**3** States but does not monitor or reward expected group skills	**4** Does not state, monitor, or reward group or social skills	
Component 5: Promotes positive interdependence				
1 Consistently arranges (organizes) tasks so group members must depend on one another to complete the task	**2** Frequently arranges (organizes) tasks so group members must depend on one another to complete the task	**3** Occasionally arranges (organizes) tasks so group members must depend on one another to complete the task	**4** Arranges tasks that permit group members to complete the task alone	
Component 6: Assesses group processing				
1 Provides students the time and procedures to analyze how well their groups are functioning and how well they are using the necessary social skills	**2** Continues to enhance analysis and assessment skills	**3** Monitors the students' development of group process analysis and assessment	**4** Allows students to analyze and assess how their groups function	**5** Does not give attention to analysis and assessment of group processing

– – – – – – – – – Variations to the right are unacceptable; variations to the left are acceptable.

_____ Variations to the left are ideal.

TOOL 14.5 *cont'd*

Tools For Schools October/November 2004

Example of Innovation Configuration

for one of the NSDC Standards for Staff Development

Learning Community Standard: Staff development that improves the learning of all students organizes adults into learning communities whose goals are aligned with those of the school and district.

The Teacher

Desired Outcome 1.1: Meets regularly with colleagues during the school day to plan instruction.					
LEVEL 1 Meets regularly with learning team during scheduled time within the school day to develop lesson plans, examine student work, monitor student progress, assess the effectiveness of instruction, and identify needs for professional learning.	**LEVEL 2** Meets regularly with learning team during the school day to plan instruction, examine student work, and monitor student progress.	**LEVEL 3** Works with learning team on special instructional projects during planning time.	**LEVEL 4** Works with others on non-instructional issues. Addresses personal concerns, not group issues.	**LEVEL 5** Uses planning time for individual planning.	**LEVEL 6** Uses planning time for non-instructional tasks (e.g. management, personal tasks).
Desired Outcome 1.2: Aligns collaborative work with school improvement goals.					
LEVEL 1 Participates frequently with all professional staff members to discuss, document, and demonstrate how their work aligns with school and district goals. Engages in professional learning with colleagues to support this work.	**LEVEL 2** Aligns the work of the learning team with schoolwide goals. Works in a learning team (grade-level, subject matter, interdisciplinary, vertical) to address issues related to the grade or subject area.	**LEVEL 3** Works in a learning team (grade-level, subject matter, interdisciplinary, vertical) to address issues related to specific grade or subject area.	**LEVEL 4** Works alone; addresses individual issues rather than school or grade-level issues.		
Desired Outcome 1.3: Participates in learning teams, some of whose membership extends beyond the school.					
LEVEL 1 Participates in state, regional, districtwide, and/or national networks. Participates in interdisciplinary or subject matter/grade-level learning teams.	**LEVEL 2** Participates in districtwide and regional networks and interdisciplinary or subject matter/grade-level learning teams.	**LEVEL 3** Participates in both interdisciplinary and subject matter/grade-level learning teams within the district.	**LEVEL 4** Participates in interdisciplinary learning teams and/or subject matter or grade-level teams only.	**LEVEL 5** Participates in individual learning outside grade level, subject area, and/or school.	

Source: *Moving NSDC's Staff Development Standards into Practice: Innovation Configurations*, by Shirley Hord and Patricia Roy. Oxford, OH: National Staff Development Council, 2004. Available through the NSDC Online Bookstore, http://store.nsdc.org.

TOOL 14.5 *cont'd*

RESOURCES

for Innovation Configuration maps

■ **"A measure of concern," by Karel Hollowell. *Tools for Schools*, February/March 2003.** A brief overview of the Concerns-Based Adoption Model (CBAM) and "stages of concern." Useful to any educator involved in a change process who needs to understand resistance and acceptance of changes. Available online at www.nsdc.org/library/publications/tools/tools2-03holl.cfm

■ **"CBAM brings order to the tornado of change," by Susan Loucks-Horsley and Donald L. Horsley. *Journal of Staff Development*, Fall 1998 (Vol. 19, No. 4), pp. 17-20.** Describes specific tools that can be used to help educators identify staff concerns and craft responses to them. Includes a discussion of Innovation Configurations. Available online at www.nsdc.org/library/jsd/horsley194.html

■ ***Implementing Change: Patterns, Principles, and Potholes,* by Gene Hall and Shirley Hord. Allyn & Bacon, 2001.** Focuses on the process of educational change and leadership using the Concerns-Based Adoption Model (CBAM). Each chapter is organized to move from concept to application covering research, a clear description of the change concept, case studies, examples, discussion questions, and activities. Available through the NSDC Online Bookstore, http://store.nsdc.org. Item #B241. Price: $54, members; $67.50, nonmembers.

■ ***Measuring Innovation Configurations: Procedures and Applications*, by Susan Heck, Suzanne M. Stiegelbauer, Gene E. Hall, & Susan F. Loucks. Reprinted and distributed by Southwest Educational Development Laboratory (SEDL), 1999.** Prepares educators on some of the issues that must be addressed when you institute a new program. Includes methods for using an Innovation Configuration (IC) map to assess how teachers are adapting innovations to their unique situations. This manual explains how to create and apply checklists to evaluate different ways individuals use parts of an innovation. Available through www.sedl.org.

■ ***Moving the NSDC Standards into Practice: Innovation Configurations,* by Shirley Hord and Pat Roy. NSDC, 2003.** Provides IC maps for each of the 12 NSDC standards and five role groups — teachers, principals, central office staff, superintendent, and school boards. Each set of ICs describes the possible actions that a particular group could take as it implements the standards. Available online at http://store.nsdc.org. Item #B221. Price: $32, members; $40, nonmembers.

■ **"Taking measure: The Innovation Configuration," by Robby Champion. *JSD*, Spring 2003 (Vol. 24, No. 2) pp. 69-70.** Offers another description of how to develop Innovation Configurations. Online version includes sample IC for a high school reading initiative. Available online at www.nsdc.org/library/publications/jsd/champion242.cfm.

■ **"What's next after adopting the standards?," by Stephanie Hirsh, *Results*, November 2003.** Explains the development of the Innovation Configuration maps to guide implementation of the NSDC Standards for Staff Development. Available online at www.nsdc.org/library/publications/results/res11-03hirs.cfm.

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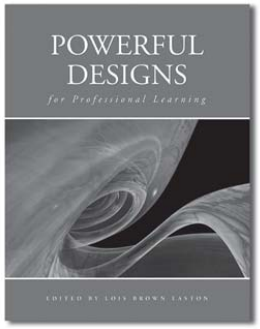
TOOL 14.5 *cont'd*

Tools For Schools October/November 2004

Going beyond workshops



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LEAD p. 2

But, Madison Parish School District's Patricia Candler, who's been using them for several years in her district, said ICs can ease the way in making changes. "In the very beginning, (teachers) did not see this as something that was going to help. Now, they see the value of knowing exactly what we want them to do. Now, they tend to take it as a positive, as an improvement instrument for their instruction," Candler said.

TOOL 14.6

Activity 5.1: Reviewing the standard

OVERVIEW

The story at the beginning of Chapter 5 focuses on the Learning Designs standard. Participants review their own experience with professional learning and consider the elements that supported outcomes at different levels. They relate their analysis to their understanding of the standard.

MATERIALS

- A copy of Chapter 5 for each participant.
- A copy of **Tool 5.1: Designs With Impact** for each participant.

OPTIONAL MATERIALS

- Learning Designs standard rationale, available at www.learningforward.org/standards/learningdesigns/index.cfm.
- Video vignette, available at www.learningforward.org/standards/learningdesigns/index.cfm#Video.
- "Study, learn, design; repeat as necessary," by Bruce R. Joyce and Emily F. Calhoun. *JSD,* August 2011, Vol. 32, No. 4, pp. 46-51, 69.

TIME

35 minutes.

LEARNING STRUCTURE

Groups of three to promote active engagement.

TOOL 14.6 *cont'd*

Activity 5.1 directions		Time
1.	Ask participants to reflect on professional development programs and initiatives that they have experienced in the last several years and to list as many as they can recall.	3 minutes
2.	Have participants place a check mark by those programs or initiatives that affected their knowledge and skills. Instruct them to place a second check next to those that affected their practice and a third check next to those that affected student performance.	3 minutes
3.	Use **Tool 5.1: Designs With Impact** to identify characteristics of programs and initiatives at the three levels of impact.	5 minutes
4.	Continue using **Tool 5.1** in a round-robin format to discuss and record design elements that characterize effective professional learning initiatives and programs that affect teacher and student learning.	8 minutes
5.	Ask participants to prepare three summary statements based on the discussion.	5 minutes
6.	Review the Learning Designs standard: *Professional learning that increases educator effectiveness and results for all students integrates theories, research, and models of human learning to achieve its intended outcomes.*	1 minute
7.	Discuss the implications of this discussion to this standard.	10 minutes

TOOL 14.6 *cont'd*

Tool 5.1: Designs with impact

Describe the features of programs or initiatives that affected your knowledge or helped you build a new skill.	Describe the features of programs or initiatives that affected your practice.	Describe the features of programs or initiatives that showed evidence of affecting student learning.
Individual notes	Individual notes	Individual notes
Group notes	Group notes	Group notes

TOOL 14.6 *cont'd*

Activity 5.2: Going deeper

OUTCOME
Participants will differentiate aspects of learning designs.

OVERVIEW
Emerging technological solutions to learning challenges as well as increased attention to professional learning have produced new designs for professional learning. Participants consider design solutions essential to achieving professional learning goals. Participants review professional learning challenges and weigh the pros and cons of various learning designs selected to address them.

MATERIALS
- A copy of Chapter 5 for each participant.
- A copy of **Tool 5.2.1: Comparing Designs** for each participant.
- A copy of **Tool 5.2.2: Learning Challenges** for each participant.

OPTIONAL MATERIALS
- Learning Designs standard rationale, available at www.learningforward.org/standards/learningdesigns/index.cfm.
- Video vignette, available at www.learningforward.org/standards/learningdesigns/index.cfm#Video.
- "Study, learn, design; repeat as necessary," by Bruce R. Joyce and Emily F. Calhoun. *JSD,* August 2011, Vol. 32, No. 4, pp. 46-51, 69.

TIME
50 minutes to 1½ hours (for 3 challenges).

LEARNING STRUCTURE
Groups of three to four to promote active engagement.

TOOL 14.6 *cont'd*

Activity 5.2 directions		Time
1.	Read the Learning Designs standard to the group or post it where all can see: *Professional learning that increases educator effectiveness and results for all students integrates theories, research, and models of human learning to achieve its intended outcomes.*	2 minutes
2.	Consider the statement: *Not all professional development is created equal.* Discuss what the statement has to do with this standard.	3 minutes
3.	Complete **Tool 5.2.1: Comparing Designs**. Use resources and the Internet to answer key questions associated with each learning design.	12 to 15 minutes
4.	Discuss possible reasons for asking individuals to complete the chart rather than providing them with the information.	3 to 5 minutes
5.	Refer to **Tool 5.2.2: Learning Challenges**. Use the information created for **Tool 5.2.1: Comparing Designs** to present a solution to each challenge. Work individually or organize groups by challenges.	12 to 15 minutes
6.	If time permits, ask groups to prepare a flip chart or slide that highlights the solution.	5 to 10 minutes
7.	Invite groups to share responses to the various challenges. Provide time for others to ask clarifying questions, to comment on the solutions, and to make recommendations for improvements.	8 minutes per challenge
8.	Discuss the potential application of knowledge and understanding generated through this activity.	5 minutes

TOOL 14.6 *cont'd*

Tool 5.2.1: Comparing designs

Learning design	Underlying assumptions	Typical procedures	Anticipated outcomes	Benefits	Costs
	What guiding principles shape this design?	What key steps or actions are associated with implementing this design?	What outcomes can be achieved with this design (i.e. knowledge, understanding, skills, attitudes, practice, student learning)?	What aspects of this design are attractive to adults?	What potential costs are associated with this design?
Lesson study					
Action research					
Webinars					
Training workshops with classroom-based coaching					
Peer coaching					
Learning communities					

TOOL 14.6 *cont'd*

Tool 5.2.2: Learning challenges

SCENARIO 1

The school system has adopted a new elementary mathematics curriculum. More than 600 elementary teachers will need training to support consistent implementation of the program districtwide. Teachers are openly saying that they do not feel that they have enough information about the new curriculum. Their questions include: How is this curriculum different than what we have been using for the past six years? Why does the district need to make a change? What is expected? Using the standard as a guide, what might district leaders respond?

SCENARIO 2

Greener Pastures Middle School's leadership team has identified adolescent literacy as a schoolwide focus for the coming year. Team members are committed to helping every teacher implement appropriate literacy strategies. The team recognizes that successful implementation will look different for each teacher, but wants to be sure that every aspect, from the initiative's launch to its evaluation, contributes to better student results. Using the information from the Learning Designs standard, identify several key issues the team will need to address in planning the initiative.

SCENARIO 3

Leslie Fischer is feeling overwhelmed this year. She has been assigned to teach 6th-grade math and science, and she is unfamiliar with the subject matter and the older students' developmental issues. Working in a small school, she does not have a teaching partner with the same assignment. She struggles each day to figure out what to do the next day to be more successful. Given what you know about the Learning Designs standard, what might you advise Fischer to do the next time she calls to share her latest challenges?

TOOL 14.6 *cont'd*

Activity 5.3: Taking action

OUTCOME
Participants will apply new knowledge to strengthen current professional learning designs.

OVERVIEW
Participants use new knowledge gained from the chapter and the previous exercises to strengthen professional learning in their work settings. They consider several professional development initiatives before narrowing the discussion to one professional development initiative that can benefit from closer attention. After careful analysis, they determine next steps to strengthen the standard's impact and reconvene after six weeks to monitor the effect of their actions.

MATERIALS
- A copy of Chapter 5 for each participant.
- A copy of **Tool 5.3: Design Update** for each participant.

OPTIONAL MATERIALS
- Learning Designs standard rationale, available at www.learningforward.org/standards/learningdesigns/index.cfm.
- Video vignette, available at www.learningforward.org/standards/learningdesigns/index.cfm#Video.
- "Study, learn, design, repeat as necessary," by Bruce R. Joyce and Emily F. Calhoun. *JSD,* August 2011, Vol. 32, No. 4, pp. 46-51, 69.

TIME
55 minutes.

LEARNING STRUCTURE
Groups of three to four to promote active engagement.

TOOL 14.6 *cont'd*

Activity 5.3 directions		Time
1.	Review the big ideas of the Learning Designs standard. Ask each group to discuss the degree to which members believe planning for professional development in their setting takes into consideration these essential ideas.	5 minutes
2.	Have group members make a list of current professional development initiatives in their school or organization that they are responsible for planning or in which they are participating.	5 minutes
3.	Invite groups to select one professional development initiative to review and potentially improve using knowledge gained from the chapter.	5 minutes
4.	Use **Tool 5.3: Design Update** to consider a current professional development initiative against the important elements of the Learning Designs standard. Refer to the Internet and other printed resources for details on professional development designs.	30 minutes
5.	After analyzing the initiative, select three steps to take to improve the professional development program or initiative.	10 minutes
6.	Commit to meet in six weeks to review the effect of your actions and to determine appropriate next steps.	

TOOL 14.6 *cont'd*

Tool 5.3: Design update

Initiative name: _____

Big ideas	Key points	Elements of current design	Suggestions to improve design	Possible next actions
Apply learning theories, research, and models.				
Select learning designs.				
Promote active engagement.				

TOOL 14.7

Data analysis connects staff learning to student performance data

PURPOSE		
Ensure alignment between adult professional learning and student achievement needs.		
TIME		
2 hours, with additional time pre- and post-session		
MATERIALS		
• Student performance data over time based on one district goal (writing, mathematics problem solving, science inquiry, culture and art) • Student work randomly selected from a variety of schools (for example, random samples of math problem solving from algebra from all high schools or writing samples from fifth-grade teachers across the district)		
STEPS		**TIME**
Pre-session		
1.	Select a skilled facilitator to guide the conversations and explain the protocol.	
2.	Select team members from across the district to engage in the protocol.	
3.	Clarify the goal of the process so that staff gather and organize appropriate data and student samples for the team to analyze.	
4.	Provide team members with the data charts and student samples, giving them ample time to study the data. Keep selections manageable. Work with only one goal at a time.	
Data analysis session		
1.	Remind the team of the purpose of its work: to analyze data from across the district to ensure that all students achieve the standards and determine the staff's district-level professional learning needs.	5 minutes

TOOL 14.7 *cont'd*

STEPS		TIME
2.	Ask participants to work in teams to answer the following questions: • What are the major findings from our students' work? • What are the strengths? Give examples. • What are the challenges? Give examples. • What factors contribute to the strengths and the weaknesses?	40 minutes
3.	Have teams share information and come to agreement. Chart the findings.	20 minutes
4.	Have the group discuss: What steps do we as a district need to take to strengthen our areas of strengths and address weaknesses through district-level professional learning?	40 minutes
5.	Tell the group that the analysis will be shared with others and incorporated into the district's professional learning plan.	5 minutes
Post session		
1.	Prepare a brief summary of the conversations, and host a session with the district superintendent or cabinet about the findings and possible next steps.	

TOOL 14.8

Goal setting system

PURPOSE
Help teams decide goals based the district's and school's learning agenda and decide how to best learn the strategies and systems for achieving those goals.
TIME
2 hours for team goal-setting; 1 hour every three to four months to monitor progress
MATERIALS
• District learning agenda • Student performance data • Professional learning goals • Evidence of success • Planning chart

STEPS		TIME
1.	Review district and/or school student performance data.	40 minutes
2.	Work through the Planning Chart to establish goals and a plan of action.	40 minutes
3.	After setting goals, review the plan with a supervisor and initiate learning.	20 minutes
4.	Begin gathering evidence of growth for teacher portfolios.	20 minutes
5.	Talk with a supervisor every three to four months to share progress, celebrate successes, receive feedback, and revise efforts and direction if necessary.	1 hour

TOOL 14.8 *cont'd*

Planning chart

The area(s) in which we will focus this year: (For example, writing)	
Our rationale is:	
Our goals are: (Express as SMART goals to ensure the goals are challenging and clear.)	
Our vision is: (What will we be doing, thinking, etc., when we are achieving our goal(s)?)	
Theory of change: (How will we get from where we are to where we want to be? What will it take for the leadership team to incorporate the new learning into our everyday work?)	
Expected effect: (On leadership, teacher practice, and student learning)	

TOOL 14.8 *cont'd*

LOGIC MODEL				
Teams set a logical pathway or model for accomplishing goals by breaking the theory of change into checkpoints.				
Long-term outcomes 10 months from now (Expected student achievement gains, shifts in teacher practices)	**Intermediate goals** 7 months from now	**Short-term outcomes** 3 months from now	**Essential resources**	**Inputs**
Measures of effectiveness				
Artifacts				

Benefits • to students: • to the school team:	**Impediments** to accomplishing our goal(s):	**Essential involvement** needed from others: