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Orchestrating Expertise in Reading and Writing

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Orchestrating Expertise in Reading and Writing

Introduction

To a music lover watching a concert from the audience, it would be easy to believe that a conductor has one of the easiest jobs in the world. There he stands, waving his arms, and the orchestra produces glorious sounds. Hidden from the audience — especially from the musical novice — are the conductor's abilities to read and interpret all of the parts at once, to play several instruments and understand the capacities of many more, to organize and coordinate the disparate parts, to motivate and communicate with all of the orchestra members. In the same way that conducting looks like hand-waving to the uninitiated, teaching looks simple from the perspective of students. Invisible in both of these performances are the many kinds of knowledge, unseen plans, and backstage moves — the skunkworks, if you will — that allow a teacher to purposefully move a group of students from one set of understandings and skills to quite another over the space of many months. (Darling-Hammond and Brandsford 2005, 1-2)

In the case of music conduction, there is much that the audience does not see and cannot know. As such, its understanding of the conductor's role in a performance can be nul, limited or based on assumption. In education, assumptions about the conductor's role can have grave implications when they are transformed into policies and practices with direct, but not always obvious consequences to teachers' practices. Although educational problems have been well documented as typically complex, institutional responses in Canada, as elsewhere, too often take the form of systemic, simplistic "training", focused around government initiatives seeking to win public favour and achieve some semblance of "accountability".

A focus on accountability often includes renewed attention on competency. The literature indicates that improving teachers' levels of competency leads to improvement in student achievement (Shulman, 2004). It is therefore not surprising that governments would focus on teachers in their consideration of school reform. In this study, we focus on one such initiative,

the Educational Foundations Program, ushered into the school system in Ontario Canada by a Liberal government in 2004. Established in part to develop competencies in the area of literacy instruction by addressing teachers' content knowledge, the Educational Foundations Program was the government's way of taking action to "ensure high literacy and numeracy skills by age 12" (MET, 2004a). At the time of the study, the Educational Foundations Program proposed a multi-faceted approach to improve literacy and numeracy achievement. Of particular relevance to this paper is the establishment of "lead" literacy and numeracy teachers in every school (MET, 2004b). The lead literacy teachers in each school were to be identified and trained in order that they may "provide expert advice and work with other classroom teachers in the school" (MET, 2004c). A second related component is that of e-learning modules through an interactive website called eWorkshop (http://www.eworkshop.on.ca/). For the purposes of this study, we have focused solely on the role of lead literacy teacher, and the literacy components of eWorkshop.

As four literacy teacher educators and researchers interested in practices that support critical teacher discernment through professional development, we found the notion of "training experts" paradoxical. In follow-up to Authors (2008), this paper is an exploration of the tensions and challenges surrounding notions of expertise within a qualitative study of lead literacy teachers from the Educational Foundations Program.

Teacher Experts in the Literature

What makes an expert teacher? Although an apparently simple question, the answer is complex and continues to be the focus of much debate and study (Loughran 2010; Carr & Skinner 2009; Elliott 2009). Indeed the literature in this field is varied and at times incongruous (Bucci, 2003). For instance, following a conversation with Educational Psychologist David Berliner, Brandt (1986) observes that "experience is a necessary but not sufficient condition for

being an expert" (7) in teaching. Thus experience alone does not necessarily guarantee expertise. Pursuant to Schon's (1983) notion of reflective practice and Polanyi's (1966) recognition that knowledge is rooted in tacit understanding, Berliner suggests to Brandt (1986) that not all experts are able to articulate *how* they do what they do. Control, organization and flexibility are a few of the key components that are characteristic of expert teachers. Similarly, Sternberg & Horvath (1995) offer a prototype of central tendencies to distinguish between novice and experts based on knowledge, insight and efficiency.

Welker (1992) explores the connection between professionalism and expertise and the social implications for conceptualizations of technical competence versus professional competence. Alternatively, Grasha (1994) considers the notion of teacher as expert a matter of style while Garmston (1998) reduces expertise to the accumulation of six identified areas of knowledge: (i) content; (ii) pedagogy, (iii) students and their learning, (iv) self-knowledge, (v) cognitive processes related to instruction; and, (vi) collegial interaction. By extension, he imagines goals for professional development that build on these six areas of professional knowledge. Finally, Bereiter & Scardemalia (1993) suggest that dominant notions of expertise emphasize knowledge and experience in fact, thus requiring a perpetual need for training and experience. They prefer instead to pursue a more comprehensive understanding of expertise, what they call a "growing edge" (1993); this is the ability for some teachers to go beyond the routine nature of their work and to engage in their role as progressive problem solvers.

This brief overview of the field of expertise in teaching aligns with Bucci's (2003) observation that "theoretical perspectives on instructional strategies, desired student outcomes and pedagogical paradigms... influence the meaning of expert and the research results" (82). In other words, before considering the question of what makes an expert teacher, one needs to

consider the context in which the notion of expert is being applied. Toward this end, Bucci describes three studies of experts in relation to education and suggests that the selection of experts "must be purposeful, meaningful, situational, emergent, and without the boundaries of one-dimensional perspectives" (88).

Methodology

Theoretical Framework

Guided by a critical theoretical framework that works towards the goal of "emancipation" (Habermas 1972, 310), this study examines notions of expert and expertise as reflected in two of the components of the Educational Foundations program. Through this examination we seek to unpack some of the social, cultural, and political forces that have shaped particular conceptualizations of teaching expertise. In particular, the study's framework is strengthened through an interpretation of adaptive and routine expertise as it has been described by Hatano & Inagaki (1986), in which the authors examine the process through which "novices become adaptive experts – performing procedural skills efficiently, but also understanding the meaning and nature of their object" (262-263). *Routine* and *expert* are distinguished as follows:

(1) Routine Experts: Routine experts identify the objectives spawned by Ministry/District initiatives. Generally, they accept the context defined by the governing bodies uncritically, and view their roles as selecting and applying strategies within those parameters efficiently. Learning is continuous, but remains fixed for the most part on increasing efficiencies –i.e., solving routine problems. Hatano & Ingaki (1986) refer to the knowledge and skills required in such a setting as "procedural" and Lourghran (2010) terms it the accumulation of technical skills. Procedural knowledge and skills are easily transmitted through training. In a setting that remains constant, procedural knowledge

and skills may be sufficient. However, experts with only procedural knowledge are less able to think about how to respond to situations that fall outside of the parameters of their training, and perhaps have been conditioned to operate with a limited understanding of how to respond to the increasing demands and challenges of a diverse student population. Rather, they may respond from an understanding of 'well-established patterns and modes of processing' (268). When the procedural knowledge and skills are linked to 'rewards'(or in this case, test scores), "people are reluctant to risk varying the skill, since they believe safety lies in relying on the conventional version" (269).

(2) Adaptive Expert: Adaptive experts, as their name suggests, approach interactions with students from a position of flexibility, openness and responsiveness. While they attend to directives and initiatives from the Ministry/District, they position the initiative as a point of departure for integrating any new information into their current knowledge, experience and practice. The adaptive expert recognizes and respects the need for clear definitions and broad perspectives, but responds to new initiatives as a challenge to strengthen and expand current understandings and practices rather than redefining the same. Because they take time to reconsider their beliefs, competencies and understandings in the process of integrating new ideas, the adaptive expert may appear to be less efficient.

We entered this study feeling that a robust, situational definition of expert, with accompanying support to develop diverse forms of expertise, would be a suitable response to the diverse and complex milieus in which teachers are today working. Given the diversity in the use of the term expert, however, and our initial identification of the paradoxical "trained expert", we were curious about the ways in which understandings of expertise were being taken up in the Educational Foundations Program. We wondered too how the political climate of urgency for

measurable outcomes would relate to the definition(s) of expert we would find. To what extent, for example, would the definition(s) promote teacher professional development as intellectual engagement or a process of deep learning (Loughran, 2010)? The study's design seeks answers to these and other pressing questions of expertise in the lead literacy teacher initiative of the Educational Foundations Program.

Data Collection and Method

As previously outlined in Authors (2008), a case study approach was taken to allow for in-depth analysis and to "provide contextually rich mediating artefacts" (Conole 2008, 190).

Data was collected over an eighteen month period, beginning in the spring of 2005 and concluding in the winter of 2006. Multiple data sources were collected in order to triangulate the results including: interview transcripts, Ontario Ministry curriculum documents and commissioned reports, teacher guides, and public statements (i.e., news releases and media interviews).

Participants from two large school boards in Ontario included five lead literacy teachers, one school-based literacy coordinator, one district lead teacher-trainer, and one district literacy coordinator. Interviews were conducted individually and following transcription, were member-checked for accuracy.

Two questions drove our inquiry in this paper:

- (1) What do the Ministry's institutional policies and practices reveal about their authors' understanding of "expert" as it relates to literacy teaching?
- (2) In what ways do the Education Foundations components contribute to the development of "expertise" in teaching Reading and Writing, as understood by:
 - a. Ministry policies and practices that reveal their operational definition and

understanding of expert/expertise;

b. Alternative definitions and understandings of expert/expertise in the Language and Literacy literature.

Though these questions guided our interviews, we also aimed to create a space where the interviewees could expand upon and redirect the questions according to their experience. Specifically, we sought to identify and better understand the ways in which the lead teachers understood and expressed notions of expert and expertise, especially since one of the goals of the training was to produce lead teachers who would serve as experts in the schools. Data were collected and reviewed to search for cross-cutting patterns or themes that offered insights in response to our questions. Reading across the data multiple times allowed us to perform a content analysis (Krippendorff 2004) of the data and identify themes emerging from the process.

Findings

While Authors (2008) discuss the tensions and contradictions between the Ministry's intention for the role of lead teacher and how the teachers themselves came to understand their role, in this study, the findings highlight the government's call for building "collective capacity" (Borst 2004, 12) and further expand on the lead teachers' notions of expert and expertise. In addition, we consider the role of the eWorkshop modules in leading towards building expert knowledge.

A Climate of "Collective Capacity"

Upon election as Ontario's Premier, Dalton McGuinty began looking for home grown solutions to education, thus appointing educationalist Michael Fullan as his Special Advisor. In an effort to understand the climate in which the Educational Foundations Program was created, we looked to Fullan's public advisements of where education should go in the province. In a

2004 interview with John Borst of *Education Today*, Fullan described building what he calls "collective capacity" within schools:

The phrase "informed professional judgment" goes back to what I described as "collective capacity". It is when teachers in the school, led by a leadership team, work together to develop their expertise. You have to get to the point where every teacher thinks of the whole school, not only of his or her own classroom. To improve the whole school, we need to learn from each other. We need to see where all of our students are and then work on strategies that make a difference"... I am talking about an increase in the professional development that occurs naturally as teachers interact with a leadership focus where they're trying to improve something — like literacy and numeracy...This kind of capacity building includes a few days a year when the leadership team itself receives professional development to enable them to help other teachers in the school. (12)

However, the political urgency for these changes to occur was revealed as Fullan stressed:

This is serious. We must make the kinds of changes that I've been talking about, and we are running out of time. If we do not make real headway in the next four years, we will lose even more credibility with the broader public which we may never recover. (12)

When prompted by Borst to elaborate on the notion of "informed prescription" versus "informed professional judgment", Fullan suggested that "informed prescription is not so helpful because it doesn't develop ownership at the level of the school; it is too driven from the centre" (12).

It is important to note that Fullan's comments follow a published series of Expert Panel reports on literacy and mathematics education issues (see for instance, OME 2003). The reports were the catalyst for the establishment of lead teachers in literacy and mathematics. The 2003 Think Literacy Report recommended that school administrators "identify expertise in [their] midst" (OME 2003, 37). The report identified characteristics of a "literacy expert" as including:

- high expectations for the literacy achievement of all students;
- expertise in literacy instruction;
- skill in using data to support student literacy achievement;
- understanding of the literacy demands of various subjects and grades;

- demonstrated success with students at risk, and
- knowledge of current research. (OME 2003, 37)

As we reviewed public statements issued by the government and positioned them next to its commissioned reports, we noted a lack of consistency and a number of contradictions in the ways in which both characterized teacher professional development and the term "expertise". For instance, the terms "teacher training" and "professional development" appeared in many cases to be conflated. One ministry news report announced that,

Lead math-literacy teachers will be trained in September on early reading and early math strategies and will act as experts in their own schools. The lead teachers will also be responsible for training their colleagues (Lead Teachers' Approved, 2003).

Then Minister of Education, Gerard Kennedy called this move "the most intensive, focused teacher development that there's been in the province" (NewsWire 2004). Yet in another Newswire release, under the heading "*Importance of Teacher Development*," the following statement was made:

Teacher training and professional development is a key component of the McGuinty government's literacy and numeracy strategy. This summer, the Ministry of Education is offering voluntary professional development programs in literacy and numeracy across the province...(Newswire 2004)

Positioning these statements alongside one another, we see the tensions between the "capacity building" intent behind the initiative, and the pragmatic process put in place to implement it.

How then, within these tensions, do those who assume the role of lead teacher come to understand what it means to be expert or have expertise?

Notions of 'Expert' and 'Expertise'

As we interviewed a number of individuals participating in various capacities within the lead teacher initiative, we were struck by the number of times their responses suggested that the notion of expertise existed outside of their experiences and knowledge, as well as the degree to

which they functioned as receivers of information (Authors 2008). A possible reason for this understanding became apparent in our discussions with 'Ken'¹, an administrator responsible for directing teacher learning. Reflective of a behavioural perspective found in the literature (Spillane 2001), is the notion that the information is filtered down from the Ministry, through the board and eventually to the teachers (see Authors 2008, for a representation of this flow). Explaining the voluntary nature of the lead teacher role, Ken explained:

before we sent out our memo to our teachers...there were some rumblings out there in the province regarding the added responsibility that the lead teacher was going to assume, so...we were very clear in saying...this is for your own personal professional development, there is not an expectation that you take this back to staff and we'd told principals this is...on a voluntary basis...when you have your divisional meetings, you can tap that person that there is no expectation that they are going to bring it back to the staff and put on workshops.

Ken adopted the government's term of "capacity building" as he associated the lead teacher role as a facilitator:

This year, they've provided 39 days per school, so we're able to take this and do some capacity building so we can build in staff time for lead teachers to work with their staff but we're making it very clear that you are a facilitator, that the knowledge is coming from the teachers themselves, that you are simply going to work through the package and stimulate some conversation around this...

While we have discussed the washdown effect of the unidirectional flow of information elsewhere (Authors 2008), what is important here, is that in this view, teachers are conceptualized as "learner in terms of their preferences for professional development, rather than in terms of their prior knowledge, beliefs and practices" (Spillane 387). Information, knowledge and expertise were a commodity of sorts, chunked and passed down, from top to bottom.

One of the lead literacy teachers in our study confirmed this through her experience in the Educational Foundations program. Barb described the overall format as "piece nailing". After returning from the in-service sessions, she asked herself, "Okay. Now how can I put that in my

¹ All names of participants in the study are pseudonyms.

classroom...there are so many things. You can just pick one or two and try to implement them". Her description of how she shared her learning with her colleagues amounted to, "Every time I go to a workshop ... I'll give [the teachers in my school] photocopies of the papers and things, and they will... if they can...either include it or ask me for more information". In this way, it would seem that the resources from the Educational Foundations program (e.g., training sessions, handouts) were seen by Barb as "stand-alone methods" to be implemented in her classrooms "as is" and where she could fit them in.

In a similar vein, notions of expert and expertise were conceptualized in terms that qualified the amount of knowledge possessed as something that could be given – although most teachers saw themselves as not having quite as much knowledge as the experts. Ken, for example, first described an "expert" as

...probably someone who has...the knowledge of what needs to be done,... it's not only knowing what you need to teach but it's being able to prove that what you've delivered is having an effect on students and I think you've become an expert that way. But it has to be both, you have to prove that what you're doing is making a difference and that would be an expert.

Ken resisted the term "expert" though, and claimed teachers are reluctant to consider themselves as experts, recasting the idea of expert as:

...a beacon of light, you know, someone who has a little bit more knowledge and...a little bit more in terms of excitement on the pedagogy and that kind of thing, at least to have the message delivered...

We wondered if developing expertise was a goal of the Ministry's Lead Literacy initiative, or if the expected outcome was to demonstrate that messages have been well-received and performed. Barb, on the other hand, suggested that expertise involves growth, and along with this growth comes the process of trial and error. In her definition of expert, she identified the following:

...someone who's got a lot of knowledge of research...and a lot of practical experience...of things that work and don't work. But things that work with one student,

and don't work with another student might be the exact thing that, you know, other students need. ... So, it's, whether you ever become that expert, it's trial and error.

Further recognizing that expertise can take on many forms, she added:

I think we've got some very knowledgeable, and I'd almost say expert people, who are leading some of the workshops, because they're knowledgeable of what works and what doesn't work and how to ...I'm just in awe of the knowledge that they have.

Despite her recognition of a process that leads to expertise, Barb positioned herself at the margins of identifying herself as an expert, remaining instead in "awe" of the knowledge or expertise of the other.

Providing Support for the Development of Expertise: A Closer Look at eWorkshop

eWorkshop² evolved as a partnership between the Ministry of Ontario and T.V. Ontario (TVO) and consisted of a series of on-line workshop modules related to literacy, mathematics, and leadership. Those specific to developing literacy understanding included: "Guided Reading", "Independent Reading", and "Shared Reading". The modules provided visual images and included a "what", "why" and "how" section. Options were offered according to whether teachers considered themselves "beginner", "familiar", or in need of "review". Notably absent from this characterization is a place for teachers who have more than a familiarity with literacy issues.

In this phase of eWorkshop, teachers were presented with basic information about a topic and then had the opportunity to practice a skill such as a taking a running record. While our intent here is not to critique the modules themselves but rather to garner our participants' understanding of their purpose and value, it bears noting that the set-up of the modules offered

² At the time of the study, the site had completed its first phase, which consisted of the creation of a "Running Records" module for reading and a "Quantity" module for mathematics. Additional modules for mathematics and literacy have been subsequently added.

little to no opportunity for teachers to discuss or critique the lessons provided, nor was there substantial research support linked to the information they presented.

Each lead literacy teacher was to share the eWorkshop modules with the literacy teachers in their school. In our research, we found limited awareness of the modules, and even less use of them. Eileen had not heard of eWorkshop at all. Elizabeth had spent some time looking at the running records but confessed, "Well, I'll tell you the truth...I haven't gone through the whole thing...just a little bit ...it was the ministry workshop that spurred me to do so". Describing the encouragement at the Ministry training session to set up time with her literacy staff to peruse eWorkshop as a professional development opportunity, Elizabeth sounded optimistic about what she might learn:

I think when we all have workshops to investigate...it makes you feel a little bit more comfortable and then maybe able to go and do it a little bit more independently and hopefully, it will be the same with this, this feature, I don't know.

However, what Elizabeth described as 'professional developed' was really an opportunity to plan and collaborate with her colleagues; in essence, engaging in professional communities of practice (Wenger 1998). This notion of professional development contrasts with the static form offered through independently practicing skills in isolation.

Unlike the other participants, Francine was very familiar with eWorkshop. Her initial introduction was during one of her lead literacy workshops and the scene she described is reminiscent of Elizabeth's desire for collaboration:

...we had teachers on different parts of it and then some would get, "Hey did you, you know, come over and look at my screen and come over and look at mine," and, and so then, then there were a lot more...aspects of it coming up at once rather than one, you know, every one on the same, on the same screen at the same time.

Enthusiastic about the potential for using the information as a catalyst for dialogue, Francine admitted that she had not looked at the modules since the previous autumn in part because there

wasn't much there. Both Elizabeth and Eileen noted the limited levels available but the general consensus was that the whole idea of accessing information via eWorkshop might work better if the Systems Operator or Computer Representative at the school was aware of the modules and could work with the teachers to ensure that they had the appropriate hardware to support the intended functionality.

From the perspective of a district administrator responsible for managing the lead teacher program, Ken noted both time and purpose in relation to the eWorkshop modules:

I think ... any one could go through those modules and learn something. I think it's a fairly good time commitment to go through it, and it's like anything else with teachers, if you release them for a day or half a day specifically to go through the modules I think they'd love them. I think for them to sit down on their own time and do it, I think you'd have a hard time with the buy-in...I think you would have probably a better buy-in with new teachers that are kind of scrambling for that information.

Ken's administrative position aligns with the idea that teachers do not have the knowledge contained in these modules. What he does not express is the possibility that experienced teachers, who are not still "scrambling" (presumably since they have developed some degree of proficiency) may not find anything new to challenge their existing knowledge or build upon it. Recall for instance Elizabeth and Francine's desire to be afforded the time to go through the information in a way that allowed them to dialogue about the information in relation to their own practice, with their colleagues. According to Loughran (2010) opportunities for processing, linking, translating and synthesizing leads teachers to develop expertise that leads to high quality pedagogical intent.

The emergent status of eWorkshop at the time of the study may have influenced the impressions these teachers had of their usefulness towards their growing expertise in literacy.

However, a completed set of modules designed to allow teachers to independently practice skills

up to a level of familiarity seems to fall short of developing expertise in dynamic ways that allow teachers to best understand the theories and practices that underpin their development deeply.

Discussion

As previous research has demonstrated (Authors 2005; Author 2004; Authors 2006; Authors 2005), mutual engagement and participation are fundamental components of a learning environment in which professionals come together in communities of professional practice to make meaning of their practice, and by extension, their world. Moreover, when teachers then try to perform their job in ways that have been narrowly conceptualized and presented as *best practice*, there is potential for a static understanding of teaching (Wilson, 2010; Author 2002).

Many researchers note that the way in which the role of teacher is characterized has significant implications in practice. For example, Shulman (1986) notes that if the teacher is characterized as discerner, with the ability to "transform understanding, performance skills, or desired attitudes or values into pedagogical representations and actions" (4) then teacher knowledge (of content, students, and pedagogy) is of paramount importance. If, however, the teacher is characterized as disseminator, charged simply with carrying out the dictates of others, then complex forms of knowledge are not necessary. The former vision casts the teacher as a professional, entailing a need for professional development that informs, enriches and extends teacher knowledge and focuses on knowledge production. The latter implies that teachers are technicians, and suggests that training and knowledge acquisition is sufficient (Author 2005).

Unfortunately, our findings indicate a similar characterization of technician rather than disseminator. Without the opportunity to reconsider beliefs, competencies and understandings in the process of integrating new literacy ideas, the role of lead literacy teacher became one of a routine expert rather than an adaptive one. Rather than creating lead teachers that were

responsible for influencing and directing others in their schools towards the creation of "collective capacity," the training was applied in a way that allowed teachers with little background experience in literacy to become more expert in their knowledge and understanding, with no expectation in the first year of the program that they train anyone. As a result, the participants in this study did not recognize a responsibility to dwell, critique, and relate the new information to what they already knew in ways that would build on their existing knowledge. Michael Fullan's goal of collective capacity was thwarted from the onset as the ideal was operationalized into an efficient way to implement training, reducing the notion of expert to that of volunteer and/or routine technician in the process. Operationalizing expertise in this way led to further contradictions between the ways in which lead teachers experienced the program and the goals the Ministry aimed to achieve; to develop teaching professionals equipped with the expertise necessary to raise the achievement of students in Literacy. The goal of collective capacity remains a worthy one, but requires a model of professional development along the lines of Hatano & Inagaki's (1986) adaptive expert – someone who is given the space to challenge and expand current understanding and practice while also attending to the directives and initiatives set forth.

Like the conductor whose narrative begins this paper, there are "many kinds of knowledge, unseen plans, and backstage moves – the skunk works if you will – that allow a teacher to purposefully move a group of students from one set of understandings and skills to quite another over the space of many months" (Darling-Hammond & Brandsford 2005). The same is true of the teachers in this study who were asked to take on an expert role with their colleagues. Perceptions of one's role and one's expertise are part of the musical score but may not be visible to those who reduce professional development to the implementation of mandates

in which efficiency overrides what it takes to build capacity. What gets ignored in the training model, are opportunities to learn new ways to help lead teachers to dwell purposefully amongst their colleagues, developing deepening understandings and increased professional competency over time. Indeed, Dr. Fullan has said, "training is not capacity building" (Fullan 2005).

Adaptive expertise, if that remains the goal for the teaching profession, requires

the opportunity to articulate what it mean[s] to be a teacher; to tangle with social issues beyond the technicalities of teaching; and having some agency within which to question and challenge the wider structures surrounding teaching and learning; and in the process gaining some ownership of the determination of ones' own pedagogical work. (Spivak, in Smyth 2001,159)

We are left with the new questions that seek to understand how the notion of professional development and capacity building might be moved out of the narrow world of training that has stifled the intellectual engagement of teachers within a profession that needs that very engagement in order to realize its human and educational potential.

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