STRATEGIC INQUIRY MODEL OF SCHOOL IMPROVEMENT:
IMPLEMENTATION PERSPECTIVES FROM SCHOOL-BASED FACILITATORS

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To Jonathan McMillan, who unknowingly taught me the meaning of Barack Obama’s words: “Never underestimate the power of your example.”
ABSTRACT

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Carl-Anthony Watson
Rand Quinn

Persistently low-achieving schools often work with external partners to receive support in improving culture and academics. Strategic Inquiry is a school turnaround model that has been implemented in poor performing high schools in New York City. The goal of this study was to learn lessons from school-based facilitators as they implemented Strategic Inquiry in three New York City high schools over three years. Interviews were conducted with Strategic Inquiry facilitators, their principals, trainers and district-level staff. The most common challenges expressed by the facilitators were the pressure for quick improvements, moving their teams of teachers, and concurrently learning and leading the process at their schools. The study shows that the principals leveraged school-based facilitators to accelerate the spread of improvement strategies and foster pockets of activity throughout the schools. Facilitators, going beyond the program expectation to learn from teams from other schools, also found value in launching collaborative learning opportunities with Strategic Inquiry teams within their own buildings. Finally, all interviewees found multiple utilities in the Strategic Inquiry process, emulating the practices to impact team learning and improvement at the district level, among school leadership teams, teacher teams and toward student outcomes not directly related to
academics. This study suggests the need to clarify the support structures needed for school-based turnaround facilitators in order to ensure the fidelity and longevity of their efforts and also a need for further study to vet the effectiveness of Strategic Inquiry in improving student academic outcomes.
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CHAPTER 1: INTRODUCTION TO THE STUDY

Collaboration among teachers in a school comes in many different formats, all aimed at creating in-house structures for improving instruction and, ultimately, student outcomes (Stewart, 2014). Effective teacher teamwork can yield a continuous feedback loop that involves co-designing lessons, critiquing the resulting student work, and then planning for next steps/interventions based on what student products demonstrate that they have learned and areas that are still deficient. While teachers are accustomed to attending professional development sessions that are staged as meetings or presentations (either at the school or hosted at another location), studies have shifted the prevailing wisdom to “acknowledge the effectiveness of teacher learning in the school context” (Nelson & Slavit, 2008, p. 101). Teams of teachers equipped with the proper skills and tools to dissect their curricula vis-à-vis student work is indeed professional development—targeted specifically in response to the findings or needs of the students actually served by the training attendees.

Further, inquiry has emerged in the field as a specific type of teacher collaboration that has a defined cycle for exploring student growth via teacher teams. Talbert, Cor, Chen, Kless and McLaughlin (2012) explained that inquiry engages “a team of teachers in systematically using evidence of struggling students’ skill gaps to both design instructional responses and re-design systems that inhibit their skill development” (p. 5). Like diagnosticians, the teachers work together to get at the root cause of why students are struggling and plan for ways of addressing students’ needs. In addition to
understanding the teaching and learning dynamic as it relates to teacher practice leading to student outcomes, inquiry also has the potential to understand: (a) the role of the broader school environment, (b) why teachers take the approaches that they do, and (c) how structures in the broader school context can serve as impediments (Talbert et al., 2012). A meticulous, repetitive process, inquiry is often rejected by schools because multiple iterations can seem slow in an environment under the demands of producing results to justify that students are learning under any newly implemented interventions.

Inquiry is “more likely” a virtuous cycle when “led by a trained peer-facilitator” (Gallimore, Ermeling, Saunders and Goldenberg, 2009, p. 537). The facilitator leads the team by monitoring the process and pushing the members to consider aspects that might be overlooked. In process-monitoring, it is important for the facilitator to also serve as a motivator when the cycle can seem arduous and/or fruitless in the iterative pursuit of results. Talbert et al. (2012) described this as “nurtur[ing] shifts in beliefs toward collective efficacy” (p. 5). Especially because the inquiry cycle is unlike the shape of widely understood models of teacher learning, the facilitator’s role is important in reminding the team of early wins and examples of how the process can yield results for students if followed through with fidelity.

Researchers disagree regarding the organizational position of the facilitator of a school-based inquiry team. On one hand, Nelson and Slavit (2008) referred to the facilitator as a “‘critical other’—someone external to the teacher group but internal to the inquiry process” (p. 107). This viewpoint suggests that the inquiry team’s leader should
be an inquiry expert who is not on staff at the school or at least someone who does not work directly with the members of the inquiry team or the students they serve.

Conversely, Goodnough (2005) advocated for an inquiry model that has a teacher from within the school who acts as the facilitator for the process. Harvey, Loftus-Hills, Rycroft-Malone, Titchen, Kitson, McCormack and Seers (2002) sat in the middle: “This role may be internal or external (or encompass a combined internal/external approach) to the organization in which the change is being implemented” (p. 585). Regardless of where the facilitator sits, the most important aspect is that the individual is trained in the process and equipped to push the team to “develop the discipline of inquiry” (Talbert et al., 2012, p. 7). Therefore, the quality of the facilitator’s training can yield differing results in the processes of the inquiry team and what they are able to accomplish.

A specific model of teacher inquiry, called Strategic Inquiry (SI), is currently being implemented in about three dozen struggling high schools in New York City. In these schools, the inquiry teams are led by internal facilitators who were trained by external trainers. To navigate the various factors that went into the development and ongoing support of the work of these SI facilitators, this study originally aimed to answer the question: What are the lived experiences of school-based facilitators who are trained in the Strategic Inquiry model of school improvement? Engaging directly with SI facilitators, there is an opportunity to learn about their pathways into becoming facilitators and also identify elements, other than their training, that are pivotal to the success and sustainability of their work. Although the initial focus of the study was a
broad exploration of the facilitators’ experiences, through the course of the study, the responses and key learnings sharpened the lens. Such an inductive approach yielded a focused examination on the structure, implementation and challenges of learning and leading Strategic Inquiry via the lens of school-based facilitators.

As the research demonstrates, there are differences in opinions about the design of teacher-led inquiry teams. This study seeks to understand how decisions were made about the structure and implementation of SI in these schools in New York City. Key decision-makers, such as district-level staff, SI trainers and principals whose schools are implementing the model, provided their perspectives as well as their rationale for selecting the initiative and factors that impacted facilitator experiences as they led their teams at the school level.

As previously stated, leading an inquiry team has its own difficulties related to motivating the team to stay the course and implementing the model with fidelity on this constant quest for improved results. However, these SI facilitators learned the process while they led the rollout at their schools. This study highlights the challenges that the facilitators faced as well as documents practices that have been successful in moving beyond roadblocks. Gathering these findings can create a feedback loop within the SI model of facilitator training and support with the aim of equipping facilitators to lead inquiry teams more effectively.

The extant literature review provides an analysis of the research around models of evidence-based inquiry, the role of facilitators, and the knowledge they should bring to
the guidance of their teams, as well as the shifts necessary so that teachers can be open to working and learning in this manner. There is background information necessary to build the reader’s schema on the general topic of collaborative teacher inquiry before examining the Strategic Inquiry model. On the surface, teacher inquiry models provide pedagogues in a school with “purposeful professional development programs that provide teachers with opportunities to learn about and experience new instructional strategies and with time to plan teaching materials and share resources” (Jao & McDougall, 2015, p. 3). The goal is for teachers to use issues related to student skill mastery as the basis for collaboration and co-learning in repetitive cycles until the teachers successfully employ strategies that positively impacts achievement for the struggling students.

Via these cycles of exploration, teachers engage in practitioner research to understand their students, the teachers’ own approaches to teaching and learning, and disconnects that stand between pedagogy and student performance. Baumfied (2016) described teacher inquiry as an intentional structure to “uncover situated knowledge and test it in context within a wider community and although there are aspirations to codify knowledge, the model is one of replication rather than establishing proven outcomes that can be generalized” (p. 3). Therefore, the inquiry space is one in which teachers explore the marriage between the curriculum that they teach, their own pedagogical practices and the assessments that they use to test if students are learning.

Of the greatest importance in generating a basic understanding of inquiry is that tools must be provided by facilitators to push the thinking of the team and buttress their
learning. A trained, equipped facilitator, whose role it is to help inquiry team members to navigate and understand that “productive tension between theory, research evidence and practice evidence creates knowledge of teaching for teaching,” provides these tools (Baumfield, 2016, p. 14). The key to collaborative teacher inquiry is a resourceful facilitator who can guide the team in setting an agenda, anticipating the challenges that the team encounters, and providing relevant and timely support to build the skills of team members as they work to respond to skill gaps in their students’ academic performance.

The Strategic Inquiry model of teacher collaboration “works to improve student achievement by addressing learning needs of struggling students at the same time that it develops leadership for inquiry-based reform” (Panero & Talbert, 2013, p. 12). School-based facilitators are trained to lead teacher teams through the inquiry process to address curriculum, instruction and assessment, as outlined as priorities by Baumfied (2016). Strategic Inquiry’s structure differs from the underpinning expectations of teacher inquiry because there is an added component that broadens the scope of the teachers’ work and the expected impact; the final phase of Strategic Inquiry calls for participants to share the process and findings with other colleagues in the school. The spread of the process and the viable strategies developed for moving student achievement has the ability to position Strategic Inquiry not just as a model of teacher collaboration but also a vehicle for whole school improvement. Teams analyze elements of school-based conditions that have led to the gaps in student performance. Therefore, the goal of Strategic Inquiry is to examine underlying systems and improve them so as to combat recidivism in student skill
deficiencies, once the inquiry cycle has concluded and to make sure future students do not get stuck in similar places.

**Background and Context**

The journey for the SI model being implemented in three dozen high schools in NYC started over a decade ago when the model was in its infancy. The first iteration, called the Scaffolded Apprenticeship Model (SAM), was utilized in a number of New York City High Schools, most notably in a large high school in Staten Island, NY. As New Dorp High School restructured into seven small learning communities (SLCs), each SLC also hosted multiple inquiry teams studying teaching and learning for the students that their SLC served. The principal of New Dorp writes (along with researchers), “Studying the system through the lens of students for whom it is not working clarifies which decisions lead to patterns in curriculum and instruction that consistently fail to meet specific students’ needs” (Scharff, DeAngelis, & Talbert, 2010, p. 59). Therefore, this version of SI took a micro look at groups of students and where they were struggling academically to make broader connections to systems in the school that perpetuate missteps.

Based on the work of the inquiry teams in the first iteration, the NYC Department of Education then required all schools to have inquiry teams embedded in their internal structures of teacher collaboration and professional learning. In a handbook produced by the NYCDOE, the initiative was seen as a “core component of [the district’s] school improvement strategy” and it was further explained that “[e]ach Inquiry Team is charged
with becoming expert in using data to identify a change in instructional practice that will accelerate learning for a specific group of underperforming students” (NYCDOE, 2008, p. 4). The district saw this intervention as a method of meeting the needs of small groups of struggling students, which would mean tens of thousands of students when looking across the entire city. The Department further characterized the ambitious theory of change noting that, “If every New York City school improves outcomes for 15 to 30 students with whom they have not previously been successful, we are talking about improvement for 21,000 to 42,000 students citywide in one year” (NYCDOE, 2008, p. 5). Therefore, the publishing of the didactic handbook and the rollout of coaches to every school were key efforts to provide the support needed for each school to launch their inquiry teams and move toward data-driven instructional decision-making.

Another important factor related to this version as the model evolved to the current iteration of Strategic Inquiry was the separation of the process into articulated phases that showed how findings of an inquiry team could/should spread to the broader school community. Table 1 portrays the three phases of the inquiry process as articulated in the first iteration.
Table 1

Three Phases of the Inquiry Process (NYCDOE, 2008)

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I</td>
<td>Identify target population students and one specific area of academic weakness.</td>
</tr>
<tr>
<td>Phase II</td>
<td>Bring more students into the school’s sphere of success by improving outcomes for target population students in the identified area.</td>
</tr>
<tr>
<td>Phase III</td>
<td>Ensure that the school continually brings more students into the sphere of success by improving decision-making processes.</td>
</tr>
</tbody>
</table>

For inquiry teams at New Dorp, the final phase in the process was, “Designs, implements, and monitors the impact of small, strategic changes that are designed to make a big difference for students in the target group and for one specific learning condition school-wide” (Scharff et al., 2010, p. 59). While the earliest version ended with a call for a continuous focus on the target population of students, the final phase in the expanded NYCDOE iteration called for a broadened lens that charged the entire school to usher “more students into the sphere of success” via the new instructional approaches derived from the findings of the inquiry team (NYCDOE, 2008, p. 11). The district’s aim for inquiry was to spread the impact in a more robust way than the first version of the process.
Also important in describing the background of Strategic Inquiry is the 2008 iteration that, in collaboration with Baruch College, provided certification for teacher teams being trained in implementing Strategic Inquiry at their high schools. This model went through a four-year evaluation by the Center for Research on the Context of Teaching at Stanford University. A key finding of the study is that, “Teachers moved to better scaffold learning objectives for their lessons and ask students to give them feedback on their learning and struggles with particular content” (Talbert et al., 2012, p. 18). This iteration of inquiry, unlike the two previously discussed iterations, resulted in collaboration between teachers and their students in identifying deficits and how to overcome them. The fact-finding culture and intentionality in data-gathering stand as core elements of Strategic Inquiry, which emerged in 2014 as an intervention for struggling high schools in New York City.

To arrive at the current iteration Strategic Inquiry, it was important to understand the background of how the model has evolved before situating it in its current context. A founder of SI, Nell Scharff Panero, points to patterns in implementation missteps at the school level in the first iteration of SI. Panero and Talbert (2013) wrote,

Schools that failed to develop an inquiry culture after four years into New York City’s inquiry initiative were alike in one important respect: the school administration did not make inquiry the engine for school improvement or invest in developing a critical mass of change leaders (p. 103).
This is further evidence of the previous suggestion that the key to inquiry is that it is built into the culture of the school and how teachers work together to diagnose student academic growth deficiencies.

When faced with the task of improving 35 failing high schools in NYC, in 2014, the new mayor and chancellor opted to resurrect a model that was instrumental in the previous administration—Strategic Inquiry. However, the goal was to leverage the lessons from the previous iterations to ensure that these schools received the full support needed to learn and implement the model. The structures also needed to be in place to respond to earlier concerns about alignment with school cultures and priorities.

This most recent SI iteration calls for each school to send teams of assistant principals or teacher leaders to monthly trainings led by experts in SI. The trainees serve as facilitators of inquiry teams at their schools. As Panero and Talbert (2013) noted, “The SAM program’s considerable investment in facilitator training has been the key to its success and is a critical ingredient for any aligned program” (p. 137). Therefore, to replicate the impacts of SAM, this new design is intentional about utilizing a train-the-trainer model to guide knowledge transfer/skill development between the expert SI trainer and the school-based facilitator. Additionally, district-level coaches were also being trained in SI; they work with the facilitators in navigating inquiry team issues at the school and serve as thought-partners.

Unlike the previous inquiry models, SI now includes a writing component that is embedded in the core teachings—Writing is Thinking through Strategic Inquiry (WITsi).
All teachers across the 35 schools are expected to utilize WITsi strategies in their lessons and inquiry teams’ focus on the students’ development of these writing skills. According to Panero (2016), “This approach is not a program or a curriculum per se. It involves embedding sentence, paragraph, and essay level strategies in content instruction to develop written and oral expression simultaneously with content knowledge” (p. 6). The task of facilitators is twofold. First, they must learn and facilitate the inquiry model; second, they have to learn and teach other staff the WITsi model. This style of teaching writing represents new thinking and would not be aligned with any prevailing wisdom related to how secondary teachers are trained. Panero (2016) further noted that, “What is most notable and atypical perhaps, especially for high schools, is that the foundational elements are taught discretely and slowly” (p. 6). For secondary teachers who were not taught how to teach writing, the facilitators in the schools implementing SI now have the role of inquiry team leader as well as staff professional developer for WITsi, which positions the facilitators as the change leaders that Panero and Talbert (2013) found were missing in the SAM iteration of inquiry.

At the time of this study’s data collection, most facilitators attended a little over two years of training and were leading inquiry teams at their schools. After each of their monthly training sessions, they brought the learning back to their schools and then reported on outcomes when they returned to the training, which was a critical juncture to engage with the facilitators to learn about their experiences to identify what elements have been essential in learning to facilitate SI and to understand the challenges that they
face and how they work to overcome them. SI is more complex than its previous iterations because of the added writing component and the positioning of SI as a school improvement effort for these struggling high schools. This complexity raises the accountability stakes for the schools implementing SI and facilitators who are being trained to lead the school-based teams in this effort.

**Rationale and Significance of Study**

For schools that struggle and/or those that wish to infuse inquiry into their teacher collaboration culture, this study has the potential to provide guidance on how to train internal change leaders. As demonstrated by the previously discussed evolution of inquiry, there are multiple versions of SI in the field. Therefore, others may find interest and transferability in viewing the experiences of SI facilitators to replicate the model in their schools and how they navigated implementation issues that arose. In reporting on the experiences of a representative sample of facilitators, adopters in the field can consider lessons that may inform their own work.

However, David and Talbert (2012), in their study of the strategies that Sanger Unified School District used to improve, cautioned against other districts seeking the same outcomes by simply duplicating the steps. Included in their report is a stern caution and admonishment for those who may get excited and act too quickly/unadvisedly:

> Underlying these views is a narrow conception of ‘replicating’ success. Our hope is that this documentation of the thinking behind and evolution of Sanger’s transformation reframes the notion of replication. It pushes the notion away from copying and towards understanding the important underlying ideas and thinking about how they can be adapted to any particular district (p. 74).
Therefore, while the findings herein from this study of SI facilitator experiences may find significance with those in the field engaged in similar work, the challenge is to shift from copying toward understanding with adaption as the lens. This lesson is important even for schools within the NYCDOE that wish to replicate SI in their local contexts.

Additionally, this study is significant through the aforementioned dual roles of SI facilitators under this model of inquiry— inquiry team leader and writing professional development. As Panero and Talbert (2013) noted, “High school teachers do not see themselves primarily as writing teachers, and they are not generally confident and comfortable in teaching writing” (p. 94). This study shows how the facilitators learned WITsi themselves and their journey in expanding the writing practices to teachers in their schools, thereby embedding WITsi in the school cultures.

The high schools currently using the Strategic Inquiry model in NYC have received two plus years of training. Over the years, the list of schools has decreased because some schools have closed. School-based facilitators attended SI train-the-trainer sessions each month for about two years. Each school has between two and six facilitators who attended the sessions and then led inquiry teams at the school level. Additionally, coaches provided by the NYCDOE also attended the sessions to gain knowledge as they supported the work. Eight trainers served as the experts who guided the training participants in the strategies and used lessons from what the participants experienced at their schools to deliver a responsive, supportive curriculum.
Currently, a research team from Teachers College has been commissioned to study the SI model as it is being implemented in these schools that are being trained. While this study focuses on facilitator experiences in SI, the Teachers College research has a broader scope of work. Their questions are as follows:

1. To what extent has the train-the-trainer model of Strategic Inquiry (SI) been implemented with fidelity?
2. To what extent has SI, with a train-the-trainer model, spread and taken hold in the case study schools?
3. How does SI, with a train-the-trainer model, impact student outcomes in 9th, 10th, and 11th grades?

Because the two research studies have a similar focus in some areas, I joined the Teachers College research team in co-creating the overall structure of instruments, planning the study, and interviewing of some participants. We have also agreed to share data to reduce the risk of overburdening participants with redundant outreaches and interviews. Because the schools have completed their final year of receiving SI training, these studies may be beneficial in capturing the lessons to learn how to continue the inquiry and writing work at each school without external support.

The study focused on gathering information from school-based facilitators about their experience being trained in the SI model as well as facilitating the inquiry teams at their schools. Each interviewee had a different perspective based on the level of exposure that they have had to inquiry in the past, as well as how many years they have been
involved in the SI trainings. I compared lessons gathered from each facilitator to what other facilitators reported to arrive at the common elements that were highlighted as key in building their skills to facilitate the model, which can provide feedback to the trainers about what participants found to be essential and key factors that aided in their development. Data gathered from district-level staff and the schools’ principals provides a rounded view of the implementation of SI and how key decisions factor into the experiences of SI facilitators. Interviews with SI trainers were also pivotal in understanding how the training equipped facilitators to be successful in situations that they encountered while leading the work.

A number of factors can lead to the challenges facilitators face while implementing the SI model at their schools. The new writing component adds a new charge for facilitators to shift thinking about teaching writing on the secondary level. Altering the school-wide culture of teacher collaboration and pedagogy comes with its challenges as well. Additional goals of the study include understanding what facilitators see as the challenges they faced in learning and implementing the SI model and learning from facilitators what was instrumental in moving the work forward despite any perceived roadblock. These lessons can help to buttress the SI curriculum and support system by building anticipatory responses to these challenges within the training.

**Conceptual Framework**

There are many moving parts related to the implementation of SI at these struggling schools in NYC. A logic model structured the conceptual framework for this
study. Knowlton and Phillips (2012) wrote, “Logic models are a graphic way to organize information and display thinking. They are a visual approach to the implicit maps we all carry in our minds about how the world does or should work” (p. 3.) Because this study introduces a model that may be new to most readers and a way of using the model that may be new to other readers familiar with previous iterations, the logic model is a visual effort to represent the goals of this SI implementation and how they may lead to outcomes for the schools involved. The reader is encouraged to revisit the logic model while reading this study as a roadmap to contextualization. Figure 1 contains a simplified version of the logic model for this study. Appendix B presents the full logic model, which also demonstrates an articulation of the problem statement, activities related to meeting the goals of the initiative, short-term outcomes and the rationales that underpin the work.
**Goal**
To increase the education field’s understanding of the role of facilitators in the Strategic Inquiry model of school improvement and also facilitators’ perceptions of how best to support and sustain their work.

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Long-term outcomes</th>
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<tbody>
<tr>
<td>Human resources</td>
<td>Development of materials for train-the-trainer sessions by SI trainers</td>
<td>Training will be turnkeyed and more teachers trained as facilitators as measured by number of facilitators in each school not trained by SI</td>
</tr>
<tr>
<td>• Office of Renewal Schools coaches</td>
<td>Attendance of monthly train-the-trainer sessions by facilitators</td>
<td>School culture will shift to a more collaborative environment as measured by the SQR rating</td>
</tr>
<tr>
<td>• Renewal school principals</td>
<td>Leading of school-based inquiry team meetings by facilitators</td>
<td></td>
</tr>
<tr>
<td>• School-based facilitators</td>
<td>Inquiry teams visits to other teams implementing SI</td>
<td></td>
</tr>
<tr>
<td>• Strategic inquiry trainers</td>
<td>Coaching provided by ORS team</td>
<td></td>
</tr>
<tr>
<td>• Teachers as members of inquiry teams</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial resources</td>
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<td></td>
</tr>
<tr>
<td>• District financial support of Strategic Inquiry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Space</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Scheduling and space for common planning time (inquiry team meetings)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
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<tr>
<td>• File/data sharing mechanisms</td>
<td></td>
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</tr>
<tr>
<td>Materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Strategic Inquiry training materials</td>
<td></td>
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</tbody>
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**Assumptions**
- The success of SI experienced at other schools, such as New Dorp, can be replicated in other NYC high schools
- District and renewal schools will use this model as the key lever for change and position it as priority above other initiatives in the schools
- District and renewal schools will provide necessary resources to support and sustain school-based facilitators as they lead SI
- Facilitators have the political buy-in of their school leaders, teachers and other key staff as they implement SI strategies

Figure 1. Simplified conceptual framework.
While the goal of this study has been identified as increasing the understanding of SI facilitators’ roles and their experiences in these roles while they lead this portion of their schools’ improvement efforts, the assumptions that underlie the use of SI are of key importance. The assumptions are positioned at the bottom of the logic model because they serve as the bedrock. Assumptions are those factors that are often beneath an iceberg, but everyone believes them to be true and constant in order for a given initiative to be successful. Key elements of the assumptions are that the success of the model is replicable, schools use SI as their key vehicle for change, the initiative maintains the support and resources from the district and their host schools and facilitators have the capital needed to lead their teams in this work.

Additionally, beneath the surface, SI implementation is fueled by research-based rationale about the legitimacy of facilitator-led inquiry efforts, the value of teachers working together to improve their schools and the efficacy of train-the-trainer models. The challenge of the study is to test these assumptions and rationales by asking key questions to relevant stakeholders to get a clear understanding of how these relate in practice. NYCDOE SI facilitator experiences are designed and shaped by these underlying factors; this study has the unique opportunity to redefine what has been widely believed as tacit knowledge to create a more dynamic view of the context on the ground. Faced with these assumptions, facilitators and other interviewees identified the challenges in these views, unintended consequences in assuming them to be true,
strategies to overcome hurdles and suggestions for improvement for future implementation.

In any initiative, the key to survival is the constant infusion of resources. The logic model displays the importance of human resources, which range from high on the district hierarchy to school-level staff—district coaches who support the schools to teachers who participate in school-based SI teams. Additionally, financial resources are pivotal in the sustainability of the model and ensuring the proper level of training and support for facilitators through the implementation of SI. Other resources, such as space, technology and materials are also important as initial inputs that lead to the outcomes related to how this model should work.

While discussing the availability of resources with key stakeholders, this study also addresses the various activities that took place in the implementation of SI in these struggling schools. The activities serve as a bridge between the inputs and the results of the work: outputs and outcomes. Facilitators and SI trainers provided insights about the training sessions and how they led to the school-based teams where teachers engaged in inquiry cycles. Principal voice provided background and context on how support for facilitators and school teams was structured, challenges associated and resulting lessons.

The quantifiable products as a result of the work serve as the outputs in the logic model. Questions about frequency of meetings, amount of resources available and other physical results of the SI work were vetted. There is currently no research about the appropriate dosage of training sessions or inquiry teams meetings that led to desired
outcomes in SI. Facilitators provided this level of insight as lessons for future iterations. The logic model also shows how these outputs can lead to desired outcomes. Therefore, the study shows, from the perspective of the facilitators, how the outputs led to some observable outcomes in facilitator training, school culture conducive to SI, the spread of inquiry in the schools distributed leadership and reciprocal training of new SI leaders.

The value of the logic model is its ability to outline and highlight the factors at work in the implementation of SI in this iteration. While the logic model represents how SI should work in these schools involved, this study tests these assumptions primarily via the lens of facilitators who have been charged with leading the model in their schools. There are many moving parts. Therefore, the reader should constantly revisit this logic model to see how various aspects fit while navigating this study. The logic model served as a roadmap for conducting the interviews, so there is also a noticeable crosswalk in the reporting of the findings.
CHAPTER 2: REVIEW OF THE LITERATURE

To engage with facilitators about how they navigate their roles, this research must first frame the SI theory and its components. This framing allowed for an informed approach to interview/instrument design. Also, because facilitators are asked to shift teacher collaboration cultures in their schools, a review was conducted of the prevailing models of professional learning among adults in schools. Specifically, Strategic Inquiry sessions are not traditional professional development workshops; hence, the train-the-trainer model was explored to understand the elements and uses. Finally, at the school level, inquiry teams are a facilitated structure of teacher collaboration. Research can provide insight into various models of facilitator-led teacher working groups in schools to lay the groundwork for exploration into how SI trainers equip facilitators to lead change in their schools via the inquiry teams. The conceptual framework’s assumptions are driven by an understanding of the use of inquiry, the function of facilitators and shifting teacher learning from traditional professional development to actively engaging in a model and transferring leadership skills to others. Therefore, this literature review provides research-based background and context to build the reader’s schema in these areas and also inform the data collection instruments.

Evidence-based Inquiry

Strategic Inquiry benefits from lessons learned from previous iterations. In its current form, SI has three distinct phases that are different from the phases used by the schools in the NYCDOE district-wide inquiry model (NYCDOE, 2008). Those phases
charge inquiry team members to move students, move a system and then move their colleagues. As Panero and Talbert (2013) observed:

Collectively, the three phases comprise the theory of action for Strategic Inquiry: how teams come to understand how learning conditions work systematically to produce the current sphere of student success, how they act strategically to improve it, and how they spread and embed the capacities needed for continual improvement more broadly and deeply across their school (p. 18).

As the team moves from one phase to another, the scope becomes larger and larger. With the initial focus on the group of students in the target population, the final phase calls for impacting colleagues within the school as a whole. As the model evolved, what stayed consistent was the idea of starting, staying or getting “small” (NYCDOE, 2008; Scharff et al., 2010; Talbert et al., 2012). The NYCDOE’s (2008) handbook on inquiry teams explained that “‘staying small’ refers to the Inquiry Team’s tight focus on a specific skill for a small group of underperforming students (15-30) in each school” (p. 5). The model uses the lessons learned from the students in the target population to affect all students in the school as the scope widens from phase I to phase III.

Choosing the small target population for the inquiry team in the SI model is a meticulous process. Panero and Talbert (2013) advised that the students should be chosen strategically “so that their improvement can give the school a boost in areas in which they are rated” (p. 19). Also, the students selected must have reliable attendance so that the team can see the impact of continued intervention. Learning targets play a crucial role in crafting the target population for an inquiry team. As Panero and Talbert (2013) explained, “Phase I focuses the team’s attention on specific skills the students lack that
are essential for their success at grade level, skills that can be taught efficiently” (p. 20). There is an intentionality that comes with identifying the focus of the inquiry team because the target has to come from the skills identified that those the students are struggling to master.

An example of the first phase in action is described by Scharff et al. (2010) as the team at New Dorp HS identified its target group of students and then went through their achievement data to find a common developing skill that is crucial for moving toward more higher order skills. Of the 25 students in the group, the team discovered, “The students could do basic math computation when it was in the context of a word problem, but they could not translate key ‘signal’ words from the written version into a mathematical form” (Scharff et al., 2010, p. 60). Phase I provides the inquiry team members with the opportunity to launch into a study of the students to ascertain what value the team can add to the students’ learning. Additionally, this exploration helps to shift teachers’ thinking to a desire to understand if/how students are acquiring the skills that teachers believed that they were teaching—a shift from a focus on teaching to a focus on learning (Talbert et al., 2012).

The second phase of Strategic Inquiry places a sharp focus on what changes can be made to address the gaps in skills found in the first phase. Inquiry team members are challenged to look at teaching and learning through the lens of the students in the target population to identify how they experience the curriculum (NYCDOE, 2008, p. 35). The goal is to understand what can be done differently by teachers to help foster student
learning in this area. Panero and Talbert (2013) explained this phase as, “The team identifies a small change that, if successful, would result in target students, and others like them, getting exactly what they had been found to need” (p. 21). In this phase, team members’ skills as diagnosticians are developed and utilized.

A key element of the second phase is the analysis of low-inference transcripts (LITs), which are “verbatim scripts of everything that is said in a classroom” (Talbert et al., 2012, p. 6). Team members visit classrooms where the students are being taught the learning target in order to examine how it is being taught. When writing an LIT, observers only record what they see and what they hear in the classroom throughout the lesson. These data are brought back to the team to review while focusing on the teaching of the learning target. Panero and Talbert (2013) explained that the findings can be informative: “When the team analyzes LITs through the specific lens of what target students do not know, they are confronted with the reality that these students do not have the opportunity in any of their classes to learn the targeted skills” (p. 22). Such a revelation illuminates the deficiencies in the curriculum and teaching that lead to skill gaps in students, which was found in the report of the New Dorp inquiry teams by Scharff et al. (2010): “Struggling students tend to lack one or more foundational skills, but because teachers are under pressure to follow a pacing calendar that is mapped to a high-stakes exam, they may not address foundational skills directly” (p. 61). Therefore, the phase then moved toward identifying what elements of the school-wide systems work to perpetuate the identified gaps in student skills.
The data on how students are taught skills in the learning target serve as the impetus for the team to begin advocating for change. Strategic Inquiry posits that elements of the larger school-wide system act as catalysts for the findings from the first part of phase II. Panero and Talbert (2013) noted, “[O]nce a team understands how one or more system works to produce the underperformance for specific struggling students, it is ready to identify a particular obstacle to student success and work to change or remove it” (p. 22). In this way, Strategic Inquiry promotes evidence-based decision making to initiate change at a large scale. Panero and Talbert (2013) also argued that this approach shifts the idea that leading change is only the job of the school’s administrators, but teams of teachers with evidence can be instrumental in moving the system.

The final phase of SI challenges the team to venture out of the inner circle to spread the findings about teaching the learning target and move their colleagues in the school. According to Panero and Talbert (2013), “In Phase III, teachers learn to apply principles for moving students and systems to leading adult learning” (p. 22). Inquiry team members have the responsibility of teaching others how to improve their instruction, essentially giving these teachers leadership roles in their schools. Talbert et al. (2012) found that this phase is pivotal in “deepening inquiry across the school, reflecting successive training of teachers in how to conduct and lead inquiry with colleagues to continuously improve student success” (p. 24). Therefore, a continuous virtuous cycle is created that spreads the tools of conducting inquiry in this fashion to arrive at positive outcomes for the students in the target population.
Facilitator’s Role and Skills Needed

The success of the inquiry team depends on the quality of the facilitator (Gallimore et al., 2009; Panero & Talbert, 2013). Researchers have offered multiple interpretations of the role and requisite skills for facilitators of inquiry groups. Initially, it is important to determine who should serve as the facilitator of such a team. On the one hand, Reason and Riley (2003) suggested that the facilitator should be someone who takes on leadership organically based on seeing an area that warrants study within the community. They observed that the facilitator must “have established a reputation in their organization or community as initiators of interesting new projects and are trusted to take a lead” (Reason & Riley, 2003, p. 215). Such a model of facilitator selection involves the process occurring on its own and driven by observed gaps in either knowledge or skill.

In contrast, Harvey et al. (2002) promoted a more prescribed approach in which the inquiry team facilitator is appointed to his or her role. This didactic model suggests that a leader or someone with authority taps and empowers the facilitator, providing that person with the mandate and resources to develop a team to study practices within the school, organization or community. Harvey et al. (2002) suggested that the facilitator can leverage a role as an established “opinion leader who through their own personal reputation and influence acts as a change agent” (p. 585). Whether self-selected or appointed, Reason and Riley (2003) and Harvey et al. (2002) agree that the facilitator’s selection is driven by a reputation that he/she already has in the community, which might
give them key support when forming a team and ultimately moving the agenda of the inquiry team’s findings throughout the broader community of practitioners.

Indeed, the facilitator plays a key role as a cheerleader of the work of the inquiry team. Whether self-selected or appointed, the facilitator must immediately get to work on articulating the mission and vision of the inquiry team to other team members. Reason and Riley (2003) saw the facilitator as an initiator who formally gets the team together and begins to promote the work ahead in a very official manner, calling it the “propositional stage” (p. 210). The cultivation period can involve the facilitator spending “considerable time talking through their ideas with potential members, sowing seeds in informal conversation,” akin to a process of lobbying support for a cause (Reason & Riley, 2003, p. 215). These steps provide a window into the team formation process, which shows that the facilitator plays a pivotal role in managing the narrative of the team’s work, especially in the nascent stages.

At the outset, the facilitator must “make things easier for others” (Harvey et al., 2002, p. 579). Therefore, other than having a reputation and initial idea of the focus of the inquiry team, the facilitator must have the skills necessary to make the complicated inquiry process more manageable overall. Reason and Riley (2003) suggested that the inquiry team facilitator must also spend time doing his or her homework in advance of the start of the formal process, as the project sponsor, “usually, the initiating facilitator has done some preparatory work” (p. 217). Question formation takes place at this stage, a result of combining the initial charge, results of conversations with potential team
members and other research/exploration that the facilitator has done as he/she maps out the gaps in the community that the team might address. Harvey and Reason (2006) asserted that “[i]f it makes sense for the initiator also to be group facilitator for the early reflection meetings, this should be made clear” (p. 186), which underscores the importance of ensuring alignment with the original vision especially in the launching stages. If the team is governed by the charge of the school leader (or someone who is not leading the inquiry team), Harvey and Reason (2006) suggested that it might be prudent for this person to lead the group in the beginning conversations to ensure that the start of the work is focused on the original goal expectations.

Because the facilitator guides the inquiry team through the process, the team is dependent on the facilitator’s expertise in managing all aspects that the team might encounter. Because these may be a broad array of areas, some research promotes teams having more than one facilitator to fill gaps in a sole facilitator’s knowledge. For instance, Heron and Reason (2006) advised that the team should identify who has skills in facilitating various parts of the team’s work and “share out roles appropriately” (p. 186). Further, Harvey et al. (2002) suggested that “[g]iven the broad focus of the facilitation concept, a wide range of facilitator roles are possible, with corresponding skills and attributes needed to fulfill the role effectively” (p. 585). This multiple leader model takes the onus off of the singular facilitator being well-versed in all aspects of inquiry, instructional content and pedagogy to address what might arise in the team learning process. Leveraging other team members as facilitators in their areas of expertise
might be seen as beginning the process of distributing leadership and fostering engagement among members.

Heron and Reason’s (2006) findings appear more open to having multiple facilitators throughout the inquiry team process with the ultimate goal of ensuring that there is a leader to address whatever needs/gaps arise. They observed that “the group can decide if it wishes to be fully democratic and eventually rotate the facilitator role, or if it would prefer one or two people to facilitate throughout” (p. 186). This suggests that the team members could opine regarding the composition of the leadership of the team. The importance of giving the team members decision-making power may be an added benefit as the team members are asked to serve as critical distributors of the inquiry findings in the SI model, as explained by Panero and Talbert (2013). Finally, Harvey et al. (2002) warned against multiple facilitators, as they explained the heavy role that facilitators play: “Consequently, the facilitator’s role is concerned with enabling the development of reflective learning by helping to identify learner needs, guide group processes, encourage critical thinking, and assess the achievement of learning goals” (p. 581). If the facilitator must enable others to learn and guide the process toward student achievement, teams must be prudent about ensuring strong, skilled inquiry facilitation that maintains commitment to the process and defined goals.

Harvey et al. (2002) expand on their research about the skills that the facilitator must have in either a “doing” role or an “enabling” facilitator. They wrote that the “doing” facilitator is “likely to be practical and task-driven, with a focus on
administrating, supporting and taking on specific tasks where necessary” (p. 581). This type of inquiry team facilitator takes a transactional/procedural approach as a monitor of the process and the various steps/stages. On the other hand, “an ‘enabling’ facilitator role is more likely to be developmental in nature, seeking to explore and release the inherent potential of individuals” (Harvey et al., 2002, p. 581). This model calls for a facilitator who is invested in developing others on the team. The difference is the level of engagement and commitment to the sustainability and spread of the findings as a result of the inquiry team’s work.

The final stage of SI gives team members the charge of spreading the lessons throughout the school, which might suggest the need for an “enabling facilitator.” It would be up to the facilitator to set the norms and conditions for team members to learn through the process and be well-equipped to turnkey lessons to other colleagues. Reason and Riley (2003) shared this pattern of thinking: “The initiating facilitator must work to establish qualities of interaction that will allow the group to grow toward a full expression of the creative cycle” (p. 220). The inquiry work’s success relies on the facilitator’s ability to foster a team model of collaboration and cooperative learning that builds the skills of the members so that the work can continue outside of the team setting.

Given those understandings of the role and skills of facilitators of inquiry teams overall, the SI facilitator specifically has the added responsibility of being versed in the tenets of this particular model. The facilitator must be skilled at enabling “individuals and teams to review their attitudes, habits, skills, ways of thinking and working” (Harvey et
al., 2002, p. 585). Such reflective practices are crucial as a team moves toward the third stage of SI. Because the facilitator guide the process, their training is pivotal to the outcomes that the team produces. Facilitators can ensure that their teams conduct the process with fidelity and “require teams to use data to improve decision-making systems that have led to the identified skill gaps and help individuals develop skills for leading organizational change” (Talbert et al., 2012, p. 7). Therefore, the facilitator not only monitors the process but also pushes team members’ thinking in order to arrive at stronger evidence to advocate for the system changes that the team recommends. Also, with teams being charged in phase III to lead change among their colleagues, the charge for the facilitator is also to train team members through the process so that they can replicate inquiry in other aspects of the school.

Through all versions of inquiry team models, there is widespread agreement that the facilitator plays a crucial role. As Gallimore et al. (2009) noted, “Selecting a team facilitator is critical to sustaining inquiry long enough for cause-effect connections to be made by a teacher team” (p. 548). The inquiry team facilitator can challenge the team to a deeper examination of the findings with an eye toward the final phase where team members have to justify proposed changes with evidence. Further, Nelson and Slavit (2008) argued that the facilitator should also be able to “draw on resources to increase teacher awareness of existing research, suggest and oversee specific types of data collection and analysis, and provide a critical and reflective lens for the teacher team” (p. 104). These strong responsibilities placed on the inquiry team facilitator buttress the
argument that the facilitator must be well-trained to lead the team with the level of expertise required to address what arises during the process.

**Professional Learning among Adults in Schools**

Strategic Inquiry facilitators are developed via the train-the-trainer process, and, in phase III of SI, team members are expected to spread the inquiry learnings and process among others throughout the school. Therefore, team members’ own experience is also a train-the-trainer process led by the school-based facilitator. Professional development for teachers usually has individual responsibility for implementing the lessons in his or her own practice—not model for others in the school community. Therefore, it is imperative to distinguish the contrast between professional development, which can be defined as a series of workshops to change a participant’s own practice (Stewart, 2014), and train-the-trainer processes of capacity building, which is explained by Pearce et al. (2012) to be “a program or a course where individuals in a specific field receive training in a given subject and instruction on how to train, monitor, and supervise other individuals in the approach” (p. 216). The research suggests that the shift from professional development to train-the-trainer is a shift from personal responsibility for learnings to an understanding of collective responsibility for school-wide improvement.

With the understanding that professional development can shift a teacher’s practice, the field has now pivoted to identifying ways to benefit from the economies of scale. As Stewart (2014) explained, “Teacher learning has gone through a ‘reform’ movement over the past decade as prevailing belief links high-quality professional
development (PD) to higher-quality teaching and high-quality teaching to student achievement” (p. 28). Therefore, the onus is on teachers to become more active participants in learning opportunities and demonstrate a collective responsibility for the learning of others. For the train-the-trainer model to be rooted, pedagogues must shift from being a learner of best practices to considering how they might teach other colleagues to improve their practice as well.

The shift from professional development to train-the-trainer also requires changes on the school level as well. A cycle of continuous learning and improvement should be each adult’s goal for the students and other teachers. Lieberman (1995) argued that in order for reform efforts to be made operational, schools must create “a culture of inquiry, where professional learning is expected, sought after, and an ongoing part of teaching and school life” (p. 593). Therefore, this involves teachers taking ownership of their own learning by identifying their areas of instructional deficiency and seeking out opportunities to learn. This “culture of inquiry” then involves spreading the knowledge by training others within the school.

What Lieberman (1995) suggested is professional learning that does not seem punitive or in response to negative ratings on a teacher’s evaluation. Instead, professional learning is an opportunity for teachers to grow and develop skills that make them more effective in moving student growth. When this is embedded into the culture of the school, teachers see their schools as learning organizations where continuous improvement is expected and the onus to lead change does not solely live with the principal or
administrators. Further, Stewart (2014) explained that learning is then active, “which requires teachers to learn together and from each other” (p. 30). This reciprocal aspect serves as the catalyst for teachers to move from personal development to the responsibility to contribute to others via utilizing the train-the-trainer model to infuse their new learnings back into the cycle for their colleagues to benefit.

Research has suggested that there are benefits related to teacher collaboration that go beyond building a culture of collective learning for the teachers. In fact, a study conducted by the University of Minnesota and the University of Toronto, “Professional community, in turn, is a strong predictor of instructional practices that are strongly associated with student achievement” (Louis, Leithwood, Wahlstrom, Anderson, Michlin & Mascall, 2010, p. 37). Therefore, there is evidence that teachers working together within a defined structure can actually improve student outcomes in a school. This finding sets the charge for principals to share leadership among the staff so that teachers feel empowered to work together and lead each other through cycles of improvement. Therefore, all adults in the building become leaders of learning and catalysts for advancing student achievement.

Louis et al. (2010) further suggested that school leadership plays a large role in setting the atmosphere for effective teacher collaboration to take place. Principals who see their role as an instructional leader who is the only one qualified to teach the teachers actually stand in the way of improvement. To yield the results of improved teacher practice via collaboration, principals have to shift their lens as well to be a participating,
contribute as a member of the learning community—not always the leader. Louis et al. (2010) noted:

Leadership effects on student achievement occur largely because effective leadership strengthens professional community—a special environment within which teachers work together to improve their practice and improve student learning (p. 37).

The principal’s role is to set the conditions for this type of teacher collaboration to take place. Once principals understand that building this type of community has the end product of increased student achievement, they can map backwards toward what needs to live in the culture so that the environment is a safe space for teachers to be vulnerable and learn from each other so that students can better learn from them.

The research suggests that true teacher collaboration must dig into the elements that undergird the teaching that occurs at the school. A 2009 report of collaborative teacher teams found that practices within continuous improvement instructional cycles pushed teachers to move past the notion of “I planned and taught the lesson” to “you haven’t taught until they’ve learned” (Gallimore et al., 2009, p. 544). Therefore, the facilitated structure of teacher professional learning has the responsibility to push beyond the teacher lens to a focus on the perspective of what the evidence from student work shows. Improved student achievement occurs when the teacher team arrives at the instructional gap between what was taught and what the students ultimately mastered. There is then a responsibility on the part of the team to improve instruction so that collaboration among teachers is fruitful and beneficial for the students.
There is no consensus in the research about who would best lead teacher working groups in schools. Spiro (2013) proclaimed that “good principals” should be “shaping the course of the school from inside the classroom and outside the office” (p. 27), emphasizing the principal when it comes to moving the school instructionally. However, leadership does not always mean being out in front. In fact, the literature suggests that principals can be the true facilitator of teacher teams by ensuring that he or she is not actually the leader. Louis et al. (2010) noted that “[w]hen principals and teachers share leadership, teachers’ working relationships are stronger and student achievement is higher” (p. 37). With the goal of effective collaboration of teachers to examine and improve their practices, principals sharing the leadership of instructional improvement is the beginning stage of any teacher collaborative process.
CHAPTER 3: METHODOLOGY

Interviews of Strategic Inquiry facilitators were conducted to identify the training experiences that helped to shape their ability to serve as facilitators of this model and also challenges that they have faced in their roles. Also interviewed were the principals of their schools and district-level staff who commissioned and shaped the initial design of SI work in these struggling schools. This research used qualitative methods because this approach “attempts to understand individuals, groups, and phenomena in their natural settings in ways that are contextualized and reflect the meaning that people make out of their own experiences” (Ravitch & Carl, 2016, p. 3). The goal is to make connections between the Strategic Inquiry trainings, via the train-the-trainer sessions and other support structures put in place by the district, and the implementation on the ground by the trainees in their school contexts.

The facilitators were interviewed in an episodic manner that elicited information about specific events and actions related to their training and implementation experiences in the program, an approach supported by Maxwell (2013). “Naturally occurring documents” were also reviewed because they provided context related to the experiences of the facilitators, which shows that these documents exist “without the involvement, facilitation, or instigation” of myself as the researcher (Ravitch & Carl, 2016, p.171). Analyzing these documents was important to ensure direct alignment with how the program was structured, as articulated in the logic model.

The following sections explain the selection of participants, interview design, data
analysis protocols, validity issues and how such issues were addressed, which are key pieces in understanding the approach to the study, the participants and how the data was analyzed.

**Participant Selection and Selection Criteria**

The most recent implementation of Strategic Inquiry in NYC struggling high schools involved schools sending staff members to monthly trainings that built their skills in facilitating inquiry teams at their respective schools using goals and practices driven by SI. The design called for trainers to use these monthly sessions to check in with the school teams and provide scaffolded support that responded to the learning needs of the growing facilitators, but the sessions were also designed to move the schools along a trajectory of school improvement goals.

Additionally, facilitator learning was buttressed by district-level coaches who were also being trained in Strategic Inquiry. These coaches attended the monthly training sessions so that they kept abreast of new learnings to support the school-based SI facilitators, as needed. The coaches were often former school administrators or master teachers who previously worked in schools similar to those struggling high schools that they supported in this improvement effort. The coach role was meant to be a lifeline of support for facilitators during the periods between each monthly SI training, not evaluative in nature although the coaches were commissioned by the Department of Education.
The SI model also called for facilitators to take lessons from working with teams from other schools and sometimes visiting those schools to identify likenesses that may inform the visitors’ SI work at their own schools. These school visits were initiated and guided by an SI trainer who made the school connections given similarities evident between two or more teams. The visit had a specific focus and intentional learning goals for the facilitators involved—both hosts and visitors. The trainers also spent time visiting facilitators in their schools as the facilitators led inquiry team meetings, which allowed the trainers to give real-time feedback and provide the facilitators with advice as each facilitator worked to improve his or her practice and skills in leading the SI model.

With the research question focused on the experiences of the facilitators, a key aspect is the preparation they received. Therefore, it is important to understand the context and setting of this study of facilitators and their training. Those elements are some that shape the acumen of SI facilitators. Panero and Talbert (2013) noted the four skills that define an effective SI facilitator: (1) applies inquiry flexibly to push learning; (2) presents evidence-based information clearly; (3) uses collaboration effectively; and (4) leads change.

This study used the purposeful sampling strategy aligned to a teaching case. This method of sampling focused the study on a defined subset of the SI facilitators so that each case “serves as a source of substantial illumination about the issues documented in the case and is written to use in teaching based on the case method” (Ravitch & Carl, 2016, p. 129). Of the 31 schools implementing Strategic Inquiry, this study approached
four “high-touch” schools, which means they share two key characteristics. First, the school has been implementing all elements of the SI train-the-trainer model of school improvement with fidelity. Second, the school has reached a stage of diffusion where the facilitators who have been trained by SI are now training other staff members to serve as facilitators of collaborative teacher inquiry teams.

All facilitators from these four high-touch schools were invited to participate in this study. The list of facilitators was acquired from the SI trainers based on the rosters they maintained over the years of conducting the trainings. Principals of the four schools were contacted to introduce them to the study and ask for their permission and interest in participating. Of the four high-touch schools, one school principal opted out of the study. In this instance, and other instances when interviewees were hard to reach or unresponsive, Dr. Panero (the lead trainer from SI) intervened to lend credibility as a strategy to gain access.

The three schools had 15 facilitators in total. All facilitators received a Doodle link to sign up for interview slots. Of the 15, 11 facilitators responded to multiple engagement attempts; these interviews were conducted via telephone conference or Google Hangout during the months of July 2017 through September 2017. Informed consent forms were sent beforehand for interviewees to review, signature and submit via email. Interview data from principals, DOE staff members and SI trainers were collected alongside the research team at Teachers College. These latter interviews were conducted either in person or via telephone conference. The next section provides background data
on the school district overall as well as the three participating schools.

**The School District**

The three high schools in this study are a part of the New York City Department of Education. The NYCDOE serves just over 1 million students across 1,800 schools. The district’s pupil population is made up of 49% female students and 51% males. Additionally, 75% of students come from low-income backgrounds and 20% of students have disabilities. Since 2012, the four-year graduation rate in NYC has risen from 60% to a rate of 74% in 2017.

Overall, there are 566 high schools in the district serving a total of 321,000 students. Of these schools 566 secondary schools, 39 of them were initially classified as Renewal Schools. Per the NYCDOE’s website, there were three criteria for being classified as a Renewal School.

These schools:

1. Were identified as Priority or Focus Schools by the State Department of Education. Priority schools fall in the bottom 5% of the lowest-performing schools statewide, while focus schools fall in the bottom 10% of progress in a subgroup.

2. Demonstrated low academic achievement for each of the three prior years (2012-2014). That is, elementary and middle schools in the bottom 25% in Math and ELA scores and high schools in the bottom 25% for the four-year graduation rate.
3. Scored “Proficient” or below on their most recent quality review.

The high schools in this study are all Renewal schools and shared the initial characteristics of the others upon being classified as such in 2014. In lieu of closing these struggling schools, the district instead opted to “work intensively with each Renewal School community over the next three years, setting clear goals and—with support from Central—holding each school community accountable for rapid improvement”. Table 2 provides a brief overview of each school in the study. Appendix C has more detail about the demographics of each school in 2016 and Appendix D provides a comprehensive list of all interviewees, their roles and affiliations.
Table 2

School in the Study

<table>
<thead>
<tr>
<th>School</th>
<th>Enrollment</th>
<th># of Years Implementing SI</th>
<th>School Quality Guide: Collaborative Teachers Rating</th>
<th>Principal</th>
</tr>
</thead>
<tbody>
<tr>
<td>East HS</td>
<td>2,200</td>
<td>5</td>
<td>Meeting Target</td>
<td>Mr. Meadows</td>
</tr>
<tr>
<td>North HS</td>
<td>2,100</td>
<td>3</td>
<td>Meeting Target</td>
<td>Ms. Tristan</td>
</tr>
<tr>
<td>West HS</td>
<td>1,800</td>
<td>3</td>
<td>Meeting Target</td>
<td>Mr. Khan</td>
</tr>
</tbody>
</table>
East HS serves approximately 2,200 students in grades nine through 12. The school has a longer history of implementing Strategic Inquiry than other schools in the study because when the principal, Mr. Meadows, arrived five years ago, he brought his knowledge and experience with SI from his previous school. At that point, the SI trainers, Dr. Panero and Ms. Hirata, were embedded into the school and began training school-based facilitators. When the school district selected SI has the vendor to provide support to the Renewal Schools, East HS began to benefit from SI via the district-funded program. The student body of East HS is 34% Asian, 22% Black, 35% Hispanic and 3% White. Additionally, the school currently has a graduation rate of 71%, which is slightly below the district’s four-year average of 74%. In the district’s School Quality Guide for the 2016-17 school year, East HS received a rating of Meeting Target in the area of Collaborative Teachers.

North HS was introduced to SI once they began the training sponsored by the district. Serving about 2,100 students in grades nine through 12, the school currently has a graduation rate of 66%, which is below the district’s average. Since 2015, the school’s graduation rate increased 1% from 65% as the school inches closer to the district average of 74%. The majority of the student population is of Hispanic descent, 63%; the school also serves 16% Asian students, 12% Black and 7% White. Ms. Tristan has been the principal for the past five years. North HS has been implementing SI for three years and currently has a Collaborative Teachers rating of Meeting Target. Of the three schools in the study, North HS has the highest percentage of teachers with three or more years of
experience, 81%.

West HS serves students in grades nine through 12 and has been implementing SI for the three years while in the Renewal program. The principal, Mr. Khan, has been at the school for four years. West HS has a graduation rate just slightly below the district’s average, 69%, which is an improvement from 2015 when the four-year graduation rate stood at 55%. The school’s 1,800 students are 33% Asian, 11% Black, 48% Hispanic and 5% White. West HS also received a rating of Meeting Target in Collaborative Teaching. In the 2016 school year, 77% of teachers at West High School had three or more years of teaching experience.

Data Collection

Interviews were used as a key source of gathering data regarding the training of SI facilitators and their experiences as they implement the model at their respective schools. Ravitch and Carl (2016) observed that a goal of qualitative interviewing is to “gain focused insight into individuals’ lived experiences” (p. 146). The interview was designed to explore how the facilitators in the target schools were developed to lead their school teams in the Strategic Inquiry model. The conceptual framework shows the way in which the research serves as the bedrock and rationale for the use of the SI model and also shows the various resources and inputs necessary to achieve the short- and long-term outcomes. Facilitator interviews provided insight into how interplay actually occurs at varying schools. To provide more of a well-rounded view of facilitators’ experiences and the structures in place that shape their experiences, interviews with their principals, SI
trainers, and district officials were leveraged. The process used Rubin and Rubin’s (2012) guidelines for a semi-structured interview, wherein the “researcher has a specific topic to learn about, prepares a limited number of questions in advance, and plans to ask follow-up questions” (p. 31). While some questions were pre-written, the goal was an in-depth conversation about the elements that were helpful in training the individual to be a facilitator of a team focused on the Strategic Inquiry principles. Therefore, the interview structure provided opportunities to build from the lessons disclosed in participant responses.

Additionally, as the researcher, I employed elements of responsive interviewing. The flexibility involved in the pattern of questioning aligns responsive interviewing with the semi-structured interview. For example, as the literature review revealed, some inquiry team facilitators are appointed by their school leader and some take on the facilitator role due to their own interest in exploring improvements in the school (Harvey et al., 2002; Reason & Riley, 2003). Semi-structured interviewing allows for supplemental questions to be posed to facilitators based on the path they took toward leading their school’s inquiry teams (Rubin & Rubin, 2012). A valuable addition is responsive interviewing’s emphasis on the interviewer building a relationship with the interviewee. As I studied facilitators working with inquiry teams, I shared my experiences of when I was introduced to the SI model. According to Rubin and Rubin (2012), “Because the researcher is asking for openness from the interviewee, the requirement for reciprocity suggests the researcher reveal something of himself or
herself” (p. 36). Shared interest and experience was used as a potential key to building a relationship with the interviewee so that he/she felt comfortable divulging the details about the journeys in becoming SI facilitators and their experiences along the way. Consent forms explained the confidential nature of participation in order to allow for candor. With the exception of the SI trainers, all facilitators, principals, district-level staff and schools were assigned pseudonyms. Appendix H has the consent forms used in this study.

Each interview followed a three-part structure similar to the three-interview series described by Seidman (2013), as it “allows both the interviewer and participant to explore the participant’s experiences, place it in a context, and reflect on its meaning” (p. 20). Instead of doing three separate interviews, one interview was conducted with three parts aligned with the goals of each interview that Seidman (2013) conducted in his model. In lieu of Seidman’s (2013) “focused life history” interview, the first part of the interview in this study was a “focus on the participants’ past experience” (p. 21). Specifically, the first part asked for background of the participant and what brought him or her to be trained as an SI facilitator. Seidman’s (2013) second interview explores “the details of the experience”; thus, the second part of the facilitator interview in this study did “not ask for opinions but rather the details of their experience, upon which their opinions may be built” (p. 21). This structure was instrumental as facilitators recounted elements of their training that shaped them in a detailed, anecdotal manner. Each element
of the SI facilitator experience, as illustrated in the Activities in the conceptual framework, were explored in this section of the interview.

Finally, the last part of the interview (and the third in the modeled three-interview series) explored a “reflection on the meaning.” According to Seidman (2013), “In interview three, we focus on that question in the context of the two previous interviews and make that meaning making the center of our attention” (p. 23). The last part of the interview with the facilitators guided them in drawing conclusions regarding their training and the degree to which they felt equipped to serve as an SI leader in their contexts. Additionally, there were questions about the school structures in place and the role that these structures played as the facilitators led their SI teams. Per a lesson from the literature review, sequencing of questions aligns with the “reflective learning” that Harvey et al. (2002) explained is necessary for inquiry team facilitators. This reflective section also explored some of the challenges in learning and facilitating the model—and what has been helpful in mitigating those roadblocks. Appendix G contains all interview protocols used in this study.

Interviews with school principals, district officials, and SI trainers were structured in the same fashion. These interviews mirrored the questions that were asked of facilitators to provide a 360 degree view of the facilitators, their roles, and the rationale for the cultures in place where the facilitators work (both in the learning and in leading the work). These different participant groups were also asked specific questions that were germane to their roles and decision making in shaping the experiences of SI facilitators.
Principals were asked about other school priorities and how they created a culture that was conducive to teachers working together in this fashion. District-level staff fielded questions about the choice to use Strategic Inquiry as the model for improvement in the Renewal high schools. Finally, the SI trainers were asked to reflect on the design of this iteration of SI, how it differed from other versions, and reasons for the shifts that were made.

**Data Analysis**

After conducting the interviews, transcripts were coded, which means connecting interviewee thoughts/opinions to specific themes. According to Rubin and Rubin (2012), “The core part of your analysis is to recognize and identify concepts, themes, events and examples and then mark them in the text” (p. 192). For the facilitator interviews, data fell into similar categories and coding helped to highlight them for comparative purposes. This design focused on understanding the differences in facilitator experiences and how these nuances of perception may have been connected to their training or the implementation factors at their schools. Where possible, the same codes were used for the interviews with the principals, SI trainers, and district staff to compare viewpoints based on perspective. When new ideas emerged, the inductive nature of coding allowed for new codes to emerge. Appendix F has selected samples of codes used and corresponding data from interviews.

An inductive approach to coding allowed for the findings within the interview to shape/develop the codes and lens. Regarding the grounded theory model, Rubin and
Rubin (2012) explained that, in “this approach, you don’t select your codes in advance, define and refine them, and then mark up text; you find and, if necessary, modify your concepts and themes as you go along” (p. 204). This protocol aligned more closely with answering the research question about SI facilitator experiences while implementing the model and dissecting their background, training and school-based implementation factors. Additionally, this exploratory approach in data analysis fostered the shift in the initial research question from a broad focus on facilitator experiences to learning more about their perspectives on implementing the model and the challenges that they faced. Although the authors explain that the grounded theory model requires a large amount of coding, this approach was helpful in capturing the lessons that came from the interviews rather than superimposing a prevailing way of thinking.

**Researcher Roles and Issues of Validity**

**Data Triangulation.** In exploring the experiences of SI facilitators, there is inevitably a limited perspective because facilitators are only privy to their own environment and the issues that drive the setting. Data triangulation “allows researchers to collect data using different sampling strategies and to examine data at varying times and places as well as with different individuals” (Ravitch & Carl, 2016, p. 195).

Therefore, interviewing the facilitators provided one viewpoint of their experiences. The data collected from discussions with the principals of these schools were collected by different interviewers. This approach allowed for the removal of any bias because the
interviewers of non-facilitator participants did not also speak with the facilitators and were not aware of responses by facilitators.

Having similar questions about facilitator background, selection, training, support, and ongoing development answered by principals, SI trainers and district sponsors allowed for triangulation around these topics. Analysis led to a juxtaposition of the varied responses by role and the way in which position is a factor in the facilitator experience. For example, as facilitators reflected on the culture and structures in their school that related to their ability to lead SI teams, principals offered their strategies for creating those structures, and the SI trainers and district staff gave background and reasoning for building these parameters into this model of improvement.

**Researcher Identity/Positionality.** Because I have participated in Strategic Inquiry training sessions in the past, such an experience, while giving me a window into the experiences of the study participants, can also cloud my judgment. Also, my role as an organizational consultant with the program leading the SI work poses another consideration. Therefore, it is important for me to explain my related previous and current experiences. Ravitch and Carl (2016) encourage the writing of a memo “to facilitate a focused written reflection on your researcher identity, including social location, positionality, and how externa and internal aspects of your experiences and identity affect and shape your meaning-making processes and influence your research” (p. 70). My goal is that my previous exposure does not affect the interviews. Therefore, after conducting first interview, I shared my positionality memo and the interview
transcript with a critical friend to elicit feedback on ways in which (if any) my questioning or conduct were shaped by the perspective that I bring to this study. As a result, I began to include more wait time for responses and more pre-designed probing questions meant to move the discussion along in a strategic, information-gathering manner.

**Validity.** Throughout the data collection, there were instances that gave me pause as the researcher. Most prevalent was the extent to which the facilitators (and one principal) lauded the support of the SI trainers/designers. Because they were grateful for the support that they credit with improving their schools, it was plausible for such praise, but I wondered the extent to which that clouded their ability to express viewpoints that might be critical of SI. Early in the data collection, I noticed that I received no responses to the question, “What skills learned in the train-the-trainer sessions have been least useful to you in leading SI at your school?” I was unsure if non-answers were because all training elements deemed valuable at different times, as respondents mentioned, or because the facilitators avoided unfavorable feedback about the training.

Maxwell (2013) writes, “Two important threats to the validity of qualitative conclusions are the selection of data that fit the researcher’s existing theory, goals, or preconceptions, and the selection of data that ‘stand out’ to the researcher” (p. 127). The previous example aligns with the first threat outlined by Maxwell. Because facilitators, without hesitation, addressed challenges related to coaches, working with their teams and leading inquiry in their school cultures, a natural goal of the research was for facilitators
to be candid about the skills imparted during training that they may not have found useful. Mr. Noris responded to this question by saying, “I don’t have any least helpful skill. You’re talking to someone that is a strong advocate of Strategic Inquiry, and the process. With my success and seeing other teachers be successful, I don’t think anything that we learned was not useful.”

When I encountered this response in my first three interviews and identified it as a threat to validity given that facilitators were unable to cite parts of the training that they did not find helpful, I worked with a critical friend to review my reflective memos and the transcripts to strategize a response for future interviews. We decided on a follow-up question that asked, “If you had to give feedback, how could the training sessions be changed in order to help you be a stronger facilitator?” This was a successful change to the protocol because it focused the facilitators on their perceived gaps in their training (what they did not receive in training) as opposed to asking them in a targeted way to be critical of the training they did receive. This process of dialogical engagement is supported by Ravitch and Carl (2016) as they encourage researchers to “meet with a partner, adviser, and/or group of peers to think through the interview instrument [and] share excerpts of the data to determine if the instrument is helping to answer the research questions” (p. 76). This reflective process, especially in the early stages of instrument design and data collection, was useful in analyzing the study, the learnings and enhancements that could be made to ensure that the research question was answered via the available interviewees.
The second category of threat by Maxwell, parts of the data that “stand out” to the researcher, was a factor that I encountered often while interviewing subjects from East HS. The school began implementing SI before the Renewal program. Also, when they initially started the inquiry work, many teachers and teacher leaders attended the iteration available at the time, the SAM school leader certification program. Some of the participants went on to receive their school administrator licenses and become Assistant Principals or SLC Directors at East HS. Therefore, their gratefulness to SAM, SI and the trainers/designers, Dr. Panero and Ms. Hirata, is evident in their interviews. In each occurrence of this perceived threat to validity, I jotted a memo to serve as a flag in the transcript and later revisited transcripts to identify other examples of this.

Regarding a question about the role that the SI trainers played in her development, Ms. Donaldson replied,

It’s coaching. It’s feedback. They were my professors in the program. Then, they also were here on a very consistent basis when we would receive the professional development on Strategic Inquiry, as well as when I was in the course with them and how to really engage in that work and how to really be a leader and be assistant principal.

From Ms. Donaldson and others at East HS, their responses reflect the role that these trainers have had in shaping their careers and livelihoods. In instances where facilitators levied matriarchal praise on Dr. Panero and/or Ms. Hirata, I countered with follow-up questions regarding the specifics of the training that might have led to these desired outcomes, per the perspective of the interviewee, to separate the feedback on the program with the affinity toward individual trainers. Finally, in findings where these quotes
appear, it is important for the reader to understand this background/relationship and how it colors East HS participants’ perceptions of the trainers.
CHAPTER 4: FINDINGS

Introduction to Findings

This chapter on findings is organized into two parts. The first section provides background content about the facilitators who are the focal point of the study. The facilitator profiles frame the lens of the reader in preparation for the second section in this chapter, which provides the analytical core of the findings. In order to draw direct connections to the research that undergirds this study as well as the goals of Strategic Inquiry, each of the four findings offers the supporting evidence base from the interviews but also maps onto one or more of the three phases of SI. This crosswalk reveals synergies with the goal of implementing SI in the Renewal schools and the roles that the facilitators played in guiding their teams of teachers and their schools through the three phases of the Strategic Inquiry model of school improvement.

Given that the implementation of Strategic Inquiry in the three schools in this study was a new initiative attached to a school improvement effort, the interviews focus on the process of change, the structures that were in place and interviewees’ perceptions of the implementation. There were areas of consensus as well as areas where varying opinions emerged, which did not cohere based on role or even based on which school a participant represented. Anonymity and confidentiality via consent forms allowed the opportunity for principals, school-based facilitators and district staff to be candid in their viewpoints and openly reflect on their experiences.
One area in which all interviewees held cohesive views was the utility of the Strategic Inquiry strategies and how they were ultimately used for explorations other than student skills improvement. Interviewees at all levels discussed how the use of SI evolved to focus on more audiences and shift additional improvement areas. That finding, outlined in this chapter, stands as the only area where participants in each category of interviewee shared aligned insights and also serves as an example of the value of the inductive approach that interviews took because participants were never asked about ways in which SI is used outside of their training. However, this additional information emerged as an element of the sequence of questions and answers, which shows the importance of this finding. New key terms and acronyms will be introduced as the interviewees discuss the intricacies of their experiences with SI. Therefore, Appendix A serves as a resource and reminder to navigate the acronyms throughout the text.

Further, upon receiving their training, the study found that there was a perceived value in having facilitators as leaders of the change process in their schools. The prevailing wisdom is that the principal serves as the instructional leader and essentially the lead teacher of teachers in the school. However, in a situation in which the school is in need of drastic academic improvement, and in a short amount of time, schools found significance in having the facilitators take on the distributed leadership roles of developers of their peers. The Strategic Inquiry training equipped them to serve in a capacity to support and guide others toward instructional improvements. As such, facilitators reported that though the Strategic Inquiry model called for their teams to visit
and learn from teams in other schools implementing the model, their teams also found it helpful to visit teams within their own building. Findings show several examples of an improved collaborative culture within the school, which was buttressed by facilitators using their Strategic Inquiry training and skills to foster a sense of co-dependency as teachers worked together to identify strategies that improved outcome for their students. While there were multiple examples of what facilitators said they learned in their Strategic Inquiry training and implementation process, interviewees were equally candid about challenges that they faced and some of the strategies they used to overcome them. Fostering collaboration and spreading inquiry are positioned as positive outcomes. However, the path to these outcomes came while working under intense pressure given that the schools implemented Strategic Inquiry as a lifeline in lieu of closure due to poor academic scores and graduation rates over a period of time. Facilitators placed a high significance in being chosen to be trained in SI and be a leader of the change initiative at their schools, but the pressure for results was evident in their interviews, and skepticism from their peers often emerged as a vicious cycle that had the potential to lead to more hurdles than victories for Strategic Inquiry teams.

Profiles of Facilitators – Background and Roles

**Facilitator profiles - East HS.** Mr. Noris serves as the leader of a Small Learning Community at East HS. With that role, Mr. Noris teaches as well as leads his peers in inquiry teams designed to improve teacher practice and student performance. His classroom is used as a model site so that his coachees can observe him implementing the
strategies that the inquiry team is exploring. Mr. Noris has been in this role for one year. It is important to note that Mr. Noris attended SAM training, mentioned earlier as a previous iteration of SI that had school leader certification attached. Although Mr. Noris was trained in SI via that program, he also attended the SI training offered by Renewal. His involvement with the training from the district afforded him the support of a district coach as well as the opportunity to liaise with the other schools receiving the training.

Ms. Humble serves as East HS’s Assistant Principal for Foreign Languages and is in her fourth year in that role. Her position involves becoming acquainted with students for whom English is a second language and designing academic interventions that meet the goal of language acquisition. When newly enrolled East HS students are new to the country, they are placed in a newcomers cohort and provided targeted support as they take part in inclusion classrooms. Ms. Humble guides teachers of all content areas in facilitating curriculum, instruction, and assessment that is conducive to the learning needs of students under her purview. In the 2016-17 school year, the school had a 20% population of English Language Learners. Also under Ms. Humble’s umbrella is leading an inquiry team with ELL students as the target population and various content area teachers as the members. She is also a graduate of the SAM program, where she received her initial exposure to inquiry, and also received additional SI training through the Renewal program’s offerings.

Ms. Godfrey is also a Director of a Small Learning Community at East HS. The students in her SLC are pursuing a particular course of study (akin to selecting a major in
higher education). Ms. Godfrey serves as the coordinator for the program while also teaching in the SLC. Although she received training in SAM, Ms. Godfrey also attended the SI sessions offered because of the school’s Renewal status. During her year as an SLC Director, and previous two years as a Lead Teacher, Ms. Godfrey has led inquiry teams with the aim of guiding teachers toward improved outcomes for the students in their scope.

Mr. Jamson has been a Small Learning Community Director at East HS for the past two years. He also received his initial inquiry training via the SAM program. Mr. Jamson’s attendance at the Renewal program’s SI trainings were not consistent. He plays a role in guiding the design and implementation of his SLC’s program as well as the development of the associated teachers. Although he has teaching duties, a part of his teacher capacity-building involves leading an inquiry team. His teachers use the SI training and strategies to identify struggling students and different ways to meet their needs instructionally.

Ms. Donaldson is the Assistant Principal of Special Education at East HS. She has been in this role for five years; the school’s Special Education population has remained steady at 16% over the past three years. Students with special needs are in classrooms across all of the school’s Small Learning Communities. Therefore, Ms. Donaldson’s role is to guide teachers in modifying their pedagogy and assessments to meet students’ unique needs. The first iteration of inquiry that she learned was when she took part in the SAM school leader certification program. Ms. Donaldson did go on to attend the SI
training in which other leaders at her school participated, sponsored by the Renewal reform effort. The inquiry team that she leads at East HS has teachers from multiple content areas as they focus on a specific set of students with special needs, their learning gaps and how to ameliorate them via improved instruction.

Ms. Johnson is a Director of a Small Learning Community at East HS. She has served in this role for one year and leads teachers in coordinating and executing the program. Although she has teacher support duties, Ms. Johnson also has a small teaching load. Ms. Johnson learned the inquiry model in the SAM program, but also attended the SI training sessions sponsored by the district. The inquiry team led by Ms. Johnson is focused on students within her SLC, a target population of struggling students as the participating teachers strategize and learn together.

**Facilitator profiles - North HS.** Ms. England is the Assistant Principal for Math at North HS. She has served in this role for five years. As a Renewal school, North HS sent Ms. England to the Strategic Inquiry training sessions to learn the model meanwhile implementing it at school. Therefore, in addition to supervising math teachers at her school and leading the design of math curriculum and assessments, Ms. English facilitates an inquiry team of math teachers. Her team focuses on students performing in the bottom third and designs new ways of meeting their learning needs.

Ms. Nolan is a Peer Collaborative Teacher at North HS. For the past four years, in this role, Ms. Nolan has aided in the development of other teachers. As she leads professional learning for her colleagues, she was sent to the Strategic Inquiry training
sessions to learn this model of teacher collaboration to implement it with a group of
teachers. Ms. Nolan works directly with a group of teachers focused on responding to the
learning needs of a group of students but also ensuring that the teachers’ pedagogical
skills are improving. Her role allows for the decentralizing of professional learning, so
that this task does not only live with Principals and Assistant Principals. Teachers receive
targeted and differentiated support via Ms. Nolan’s role as a PCT.

Ms. Smith is also a Peer Collaborative Teacher at North HS. She has been in this
role for the past four years. In her role, Ms. Smith is seen as a highly skilled teacher who
can take what she knows about teaching and learning and impart it to her peers. She
builds this trust by learning teachers’ areas of growth and providing support in their
development. Ms. Smith attended the SI training from the Renewal program and used
that knowledge to lead inquiry teams at North HS. These teams use the students as the
basis of study as teachers worked together to identify learning needs and how to respond
instructionally. Teachers were to develop their data analysis and intervention skills by
going through this process under Ms. Smith’s leadership.

**Facilitator profiles - West HS.** Mr. Blast is a Peer Collaborative Teacher at
West HS. For the past two years, he has served in this role as he leads his fellow teachers
in in-house staff development. For two years he also attended the Strategic Inquiry
training sessions hosted by the district. Based on learnings from those sessions, Mr. Blast
has also been leading inquiry teams with teachers at his school. His involvement in this
initiative is his first formal inquiry training, and he must also implement with teachers at
his school while learning. With the third goal of SI being to spread inquiry, his position as a PCT gives him the leverage to lead and perpetuate inquiry among the staff at West HS because it is a model of teacher collaboration.

Ms. Thornhill has also served as a Peer Collaborative Teacher at West HS for the past two years. As a highly skilled teacher, she uses her knowledge and expertise to lead others in their development. She attended the SI trainings and brought her new skills to West HS to use as she guides teachers under her purview. As a Peer Collaborative Teacher, she meets often with the school leadership team members, to understand and set priorities for teaching and learning. These alignment opportunities drive the type of support that she designs for teachers as well as the student targets for the inquiry teams that she leads.

Mr. Harry is an Assistant Principal at West HS. He has served in this role for the past four years. As a member of the leadership team, Mr. Harry works with the principal, Mr. Khan, to improve all outcomes in the school. Mr. Harry received his inquiry training at the SI sessions held at the district. He used this training to lead inquiry teams himself and also guide other facilitators in the school leading inquiry teams. Mr. Harry was able to develop teachers firsthand in his inquiry teams and also support PCTs as they worked with improving the skills of teachers in their respective teams.

**Challenges Facilitators Faced in Leading SI**

As the facilitators reflected on the training they received in Strategic Inquiry and the work that they have done at their schools to implement the model, they spoke about
some of the challenges they faced. The most common challenges expressed by the facilitators were the pressure for quick improvements, moving their teams of teachers, and learning the process while also leading it at their schools. The following sections will introduce the findings around each of these challenges and also relate them to the three phases of Strategic Inquiry: move students, move a system and move colleagues (Panero and Talbert, 2013). Such a juxtaposition will connect the goals of the model as articulated by the three phases and illuminate how progress toward those goals were impacted by the challenges faced by facilitators.

Pressure to show improvements in a short period of time. As schools in the Renewal program, they were already under scrutiny because implementing Strategic Inquiry was designed to improve their results in lieu of closing the school. The pressure was felt by SI facilitators and their teacher teams alike. Ms. Johnson explained it as “a difficult adjustment to make.” Because inquiry is a process that leads to interventions that hopefully improve student outcomes, teachers at East HS became frustrated because they wanted to see results quicker. Ms. Johnson said,

There are many conversations that we would have and teachers would get really mad because they weren’t seeing the results that they wanted to see. I think we get very used to seeing that as a failure, and it’s not—it’s just we found something that didn’t work, so how can we fix it? An inquiry is a never ending process and we only have these students in front of above for about nine, eight, ten months. How much power can we give to them in that short amount of time?

With the consequence for lack of improvement seemingly being school closure, Ms. Johnson found it challenging that teachers wanted quick wins and lost sight of inquiry
being an exploratory process that could lead to improvement. She explained her viewpoint on the trial and error nature of SI, “I think it’s hard for the teachers, it’s hard for the facilitator.”

The sentiment was also expressed by Ms. Donaldson at East HS. Her feeling was that the school was “under the microscope as far as benchmarks are concerned.” Being named a Renewal school and paired with the SI model felt like a lifeline and the expectation was results. Having been trained in SAM, Ms. Donaldson had previous exposure to the model and knew that change via the Strategic Inquiry process takes time.

Yet she explained,

Knowing that you can really only make effective change if you engage in the work and really do the work, but also knowing that you have to hit X by X date or X is going to happen is something that is very challenging because you know that it is a process but also you know that you have to lead.

The challenge was to keep her team focused on the authenticity of the process and shield them from the outside demands for data showing student improvements.

Given that the Strategic Inquiry process is cyclical and a method of trying interventions to see what would improve student gaps in a particular skill, facilitators dealt with the pressure to show results quickly coupled with instances when interventions did not work. This was demotivating for Ms. England’s inquiry team. Her response: “I think with any of this, you have to be a very reflective person to frame that inquiry work is about reflecting on your work and being able to say, ‘What I tried didn’t work and so I tried something else.’” Similar to Ms. Donaldson, Ms. England had experience with a
different version of inquiry in earlier parts of her career. Therefore, she shared the understanding that seeing changes would take time. Ms. England aimed to model reflective practices for her team and it being acceptable and part of the process to try things that may not work at first. However, she was aware of the roadblock that teachers were feeling:

It’s a challenge, but I am actually a reflective person so I don’t actually have a problem. I could see that in the environment that we were in in terms of it being high-stakes because of us being a group of Renewal schools, that that might be inhibited to be truly reflective.

Ms. England openly reflected and owned mistakes with her team in hopes of easing the pressure and keeping them committed to the change process via SI.

Ms. England also used the pressure to improve quickly as a tactic to get her team to recover quickly from initiatives that did not immediately yield student growth. She encouraged them not to dwell, but to identify new interventions straightaway to find what would work to boost student achievement for the team’s target population. She explained,

Because you’re in a high-stakes situation, you have to move forward if you made a poor choice, let’s say, on what you selected to start your inquiry work on. For me to be reflective, people may be nervous to be that reflective publicly.

As the leader for her inquiry team and also an Assistant Principal in the school, Ms. England leveraged the pressure to improve by modeling public reflection and how to move forward quickly toward identifying and implementing a new intervention.

The Renewal schools’ engagement with Strategic Inquiry training was only designed to be for three years, which created a time-sensitive nature and posed another
pressure for improvement. Mr. Harry at West HS saw that his teams made progress but, in his view, the three year period was insufficient. He explained:

We’re always looking to grow the practice. And that process has a solution and is part of—we’re only in year three type thing, so year four looks better as we move forward because we get to identify more experienced teachers who will be able to turnkey the practices in the departments.

Mr. Harry felt that his teams, and the school overall, got better at the Strategic Inquiry model over time. His response to the pressure for quick results is that the fourth year of implementation would expand the training to more teachers and enhance the school’s ability to address more students’ learning needs via inquiry.

For the facilitators, the iterative process of Strategic Inquiry did not align well with the need to show results in a short period of time. This challenge impacted the inquiry teams’ ability to move students because the hyper focus on results bred frustration among team members. As Ms. Donaldson explained, “It is a process but also you know that you have to lead.” Therefore, the challenge was to acknowledge the pressure to achieve and celebrate wins and also continue to guide the team toward interventions that responded to the needs of the students in the team’s target population. The facilitator played the role of easing the apprehensions of team members so that they could focus on the process of inquiry in hopes to move students and then proceed to the subsequent phases of Strategic Inquiry, which has implications for changes to the system overall and other colleagues external to the team.
Unsuccessful interventions and the impacts on team morale. Another common challenge for facilitators was identifying how to move the team when they were stuck. As previously discussed, the facilitators and their teams encountered instances in which the academic interventions that they put in place did not work to improve student outcomes. Teams look to facilitators to guide them across the hurdle and toward a more successful path. Mr. Blast at West HS reflected, “Something that I’m realizing, just in the past year, you really do have to learn when to push your teams to go to the next step.” He explained that, at times, he found himself leading his team through revising a strategy multiple times but still not having a positive impact. The relentless pursuit of different results would actually stymie the team from addressing other high leverage skills that the target students also needed to be successful. He explained this struggle:

So in the inquiry process of recognizing, you know, getting stuck and really digging deep into one strategy that you think the students need and they’re not learning is really valuable, but there’s also a lot of value in recognizing, ‘Hey, we’re stuck here. Let’s learn from it—but let’s push on to another strategy to learn more.’

Mr. Blast explained that it was a challenge to know when to make the call to continue toiling and when to decide to take the lessons from that endeavor and transition to another skill.

While Mr. Blast found it difficult to move his team when the strategy did not yield student growth, Ms. Thornhill’s expressed challenge related to moving her team focused on teacher growth. She explained, “The hardest thing I had to deal with were people who spent 10 months in CPT during the school year who still you couldn’t move
them, you know? That for me was the hardest thing.” Even after an entire school year, Ms. Thornhill had teachers who struggled with the practices of inquiry and/or implementing strategies in their classrooms as a result of the inquiry work. Essentially, if the teachers’ practices were not improving as a result of the SI cycle, their abilities to meet students’ needs were also impeded.

Ms. Thornhill in particular lamented about an SI team that she led and the challenge of working with the veteran teachers in the group. Given that the writing model was new to them, their skepticism created a barrier for their learning and openness to attempt the WITsi strategies. Ms. Thornhill said, “My second group were a bunch of veteran teachers who just really weren’t going to change their ways and I think that’s what made it harder for me as a facilitator of these meetings.” Also important to remember is that Ms. Thornhill was a Peer Collaborative Teacher. Therefore, she did not have any positional authority over teachers. Her job was to serve as a peer coach and she found that the team learning was interrupted by the veteran teachers who, in Ms. Thornhill’s viewpoint, served as a roadblock for implementing new practices in writing with students who were struggling in that area.

Roadblocks along the Strategic Inquiry process had impacts on team morale, but the direct, practical result of unsuccessful interventions was the momentary inability to move students toward mastery of standards. While such an impasse presented an interruption in the student growth phase of SI, there was a potential for a stronger approach toward the next two phases of moving the system and colleagues. Hurdles in
phase I were seen by Mr. Blast as encouragement to try harder. Such lessons have impacts for building team stamina if Mr. Blast’s stance of “let’s push on to another strategy to learn more” persists. The dynamic of sceptical team members created an additional challenge for facilitators in getting the team to move students through the process of piloting various interventions.

**Learning the model while leading the model.** The design of the Strategic Inquiry train-the-trainer sessions called for the facilitators to be leading and implementing the model while they were still attending training sessions themselves.

Another common challenge was created by the dichotomy of leading the model while still learning the model. Ms. Johnson explained, “I had only experienced SI work for about a year before I was leading a team of teachers and it’s a messy process.” While Ms. Johnson was encouraging her team to trust the process as they worked through the cycle of inquiry, there was also a degree of trust in her that she felt might have eroded if her team saw that she too was learning and wading through the “messy process.” She explained,

> I think it’s hard to lead teachers because the expectation is they need to know a little bit more or you need to be perfect because you don’t want them to criticize anything or they don’t necessarily like that things are messy because they’re teachers; they’re organized, and they want an end result, and they want to know what their goal is because if you tell them what their goal is then they can figure out the way to reach it instead of this experiment that they play and I think it’s difficult.

Although Ms. Johnson was still learning the SI model herself, she had to manage for her team members the ambiguous nature of what the process would likely, not a guarantee,
yield in terms of outcomes for children coupled with Mr. Johnson’s feelings of losing her vote of confidence because she could not deliver the clarity that teachers craved.

Mr. Noris’ reaction to learning while leading was an optimistic viewpoint that he would get better over time. Each year, as issues arose, he learned new facilitator moves and thought of himself as more prepared. He reflected, “The challenges we really faced in the beginning. Obviously, when you’re learning, as I’m facilitating and as I’m learning, a lot of times things happen, so I was more reactive to things, like, ‘This happened. Now let me just think about my next move,’ rather than being preemptive. I learned after my first year a lot of different things that I had to do.” Those moments of pause to process and craft a reaction are what typified his responses as he managed what he viewed as his hardest year—the first year when he was building his toolkit of facilitative practices meanwhile leading and experiencing different challenges with his team.

Ms. Humble, an Assistant Principal at her school, found that being an administrator and an SI facilitator was helpful because it built the lens and outlook of the school leaders. She explained,

I think leading and being a facilitator, I think, is really something that helps as the administration. In the beginning, there was a lot of managing. I think that when you’re learning it yourself, you’re trying to help them to do it, where as a leader, as long as those skills are taught well, and for them to understand why the tennis chart is so important, and more like the how and the why. Then they do, it all comes into place.

Ms. Humble’s strategy of dealing with the issue of learning while leading was to step back with teachers to understand the reasons for decisions and offer help to build
teachers’ skills. As an administrator, there was a stronger sense of ownership of the practical need to grow teacher pedagogical competencies because the members of Ms. Humble’s team were also her direct reports, managed by her and not just members of her inquiry team.

Teacher skepticism and pushback was a common challenge for the facilitators. Mr. Jamson explained, “One of the first things that you always have is the pushback from the teachers, initially because they don’t understand why we have to do what we’re doing.” Because Strategic Inquiry is a process, teachers on the inquiry teams became quickly restless as they experienced this cycle in pursuit of results. Ms. Godfrey shared that some teachers thought initially that SI was “a monumental waste of their time.” The facilitators responded by honing their skills as what Harvey et al. (2002) refer to as an “enabling” facilitator. In this manner, they focused on being “developmental in nature, seeking to explore and release the inherent potential of individuals” (p. 581). The goal was to immerse the inquiry team members in the practice of Strategic Inquiry so that they could experience the benefits and understand the purpose for themselves.

The SI facilitator, as team cheerleader, motivated their team members to stay the course. Ms. Godfrey explained, “We heavily encouraged them to implement [the intervention strategies] in their classrooms on a weekly basis. Eventually, towards the end of the year, they come back and they’d say, ‘Oh, I see. I see what you were trying to do.’” Facilitators needed the wherewithal to respond to teacher pushback with inspiration and a commitment to see the process through. Although teachers openly expressed that
Strategic Inquiry seemed like a waste of their time initially and, Ms. Godfrey explains, “did not believe in it or did not see how this would be beneficial to our students,” their minds changed after completing a year of implementation and seeing results.

A key component of the Strategic Inquiry process required teams to “identify a specific, high-leverage skills that students lacked” (Scharff et al., 2010, p. 60). That was another common area in which facilitators struggled in leading the model. Even after identifying what questions students continually got incorrect on assessments, the next step of finding the actual skill that teachers could teach to ameliorate the issue was difficult for some facilitators and their teams. Ms. Humble explained:

> It was very difficult to get small, because you can say vocabulary, vocabulary, vocabulary, but what does that mean. In order to break everything down and see specific vocabulary, or that vocabulary that’s going to get them to next level, was something that was difficult.

Identifying what teachers could teach as an intervention to address the skill gap was where Ms. Humble and her team were stymied. Although she said, “I was a teacher for a long time, and I thought I had all the answers,” Strategic Inquiry brought the realization that working as a team to address student needs collectively required a new level of transparency and an ability to articulate instructional moves that, if they work, should be transferable to others.

Ms. Johnson explained that maturation of her own skills allowed for her to get better at leading her team in getting small. She said, “Once you get really good at something it’s easier to break down a skill for content.” She encouraged her team to
struggle through their roadblocks so that they could see the process and how their collective work yielded results. Ms. Johnson further reflected, “For me it became easier for me to break down a math question and figure out what math skills the students need to learn. I think it’s harder to break down something that you haven’t really gone through as often as you maybe should.” For her inquiry team, there was a great emphasis on understanding the content as the teacher to view it from the students’ perspectives, how students learn it based on how the pedagogues teach it.

While the challenges in leading Strategic Inquiry were nuanced and varied, the challenges with leading the writing portion of the improvement initiative, WIT, was standard across all respondents. Because the process was new to the facilitators and the teachers, inquiry team members found difficulty in having teachers understand the strategy and also convincing those who did not teach English that the writing strategies would be useful for students in their content area. The facilitators reported a mixture of successes and works in progress regarding getting teachers on board with WIT in their inquiry teams. Ms. Smith said, “The first year I had teachers who would take agenda’s and just leave them on the table. Whereas by my third year, teachers had folders here in the meeting space where they would pile all their materials and go back to materials as they would need to, to bring the process forward.” Over time, WIT gained buy-in from Ms. Smith’s teachers. However, Ms. Thornhill had the opposite experience: “Them not wanting to do it. That’s the biggest challenge—it’s people who are just too stubborn to try it.”
Implementing WIT at their schools often required facilitators to become teachers of writing for some members of their inquiry teams. Mr. Noris explained, “It was a learning process for the teacher to actually learn the correct way of writing, and then learn how do we implement that writing, so that was a really large learning curve.” Teachers not knowing what an appositive was or how to identify a coordinating conjunction was common. Therefore, facilitators would have to build the team members’ knowledge of writing to lead them to identifying these missteps in a student’s work and how to teach the strategies.

Also at East HS, Mr. Jamson experienced pushback from English teachers and non-English teachers alike. For teachers of English classes, the feedback was around what they thought was best for the students’ learning. Mr. Jamson explained, “The English classes also, we have some pushback from the English teachers saying that this is not part of their curriculum or part of what they’re supposed to be teaching right now.” Though English teachers had the closest knowledge to the WIT skills, their resistance was because it was a disruption in their scope and sequence. Teachers of other content areas voiced their displeasure because of their view of WIT also being unrelated to what they were supposed to be teaching. Mr. Jamson shared, “The biggest challenge is that, for example, a math teacher would say, ‘That’s English, why do I need to teach that?’”

For Ms. Nolan at North HS, her team’s resistance around WIT was defiance or lack of interest. They wrestled with the competing priorities of wanting to see quick
results on state exams and feeling that teaching the WIT strategies seemingly takes up
time that could be used to teach content knowledge. She explained:

I think one of them is because the strategy for WIT really is like a building a
capacity around looking at writing. That’s because there is the competing demand
of the sort of like content and the push for success on regents. It’s very hard to
change the mental model and the mindset of teachers that really just feel that they
need to focus on sort of coverage of content and concept.

The prevailing wisdom was to drill students with test prep and focusing on writing skills
would be “slowing that down.”

The pressure related to time to learn the WIT process was also shared by Ms.
England’s teams at North HS. Although her teachers were creating student tasks with the
writing embedded, Ms. England wanted her team members to go back to reflect on some
of the tasks to learn lessons on how they were developed, how they were administered to
students and what they could do to improve the WIT strategies in the tasks. Ms. England
referred to this as “that constant move forward and not have that time to revise something
that, maybe, could be better for next year.” Her thinking was that the revisiting of the task
would mean “wouldn’t have to do it again” in the future. However, with the race toward
results and moving on to new strategies, Ms. England could not convince her team to
look backward for improvement lessons. She said they would complain, “I’ve already
taught that lesson, so I don’t have time to go back and revisit that task because I’m not
giving that task again this year.”

Mr. Blast’s challenges with leading WIT mirrored the experience of Mr. Noris
and Mr. Jamson at East HS. First, teachers were not strong writers themselves, so they
were unfamiliar with the writing strategies. When Mr. Blast realized that the resistance was due to teachers’ lack of skill in writing, he shifted to teaching the skills to boost their confidence. He explained,

An example would be last year, we wanted to focus on getting students to improve their topic sentences. To do that, we needed to have some teacher learning about what a topic sentence was and… ways to improve a topic sentence in a paragraph.

After identifying the source of the resistance, Mr. Blast had to be meticulous in his response. As Ms. Donaldson explained after noticing skill gaps were the cause for some of her teacher resistance, “People get very defensive because you’re put on display.” Therefore, Mr. Blast made the writing sessions for all the teachers on his inquiry team and not just the ones who displayed the deficiencies.

However, that tactic ignited pushback from the English teachers on the inquiry team. Similar to Mr. Jamson’s experience, the English teachers on Mr. Blast’s team disagreed with the use of the WIT strategies because they felt that their expertise called for alternate pedagogical routes in writing instruction. Mr. Blast explained, “That was probably the biggest challenge. All the English teachers think that their strategies are the way to get people to write better. I think that’s probably the biggest obstacle.” For example, an English teacher on Mr. Blast’s team thought that the focus on disparate writing skills was slowing the students down and the students needed to continue to write full essays to get better. Mr. Blast reflected, “You can’t stop someone from asking their students to write more, but you can prove through writing better that they’re actually
going to be improving their understanding of the content.” For Mr. Blast, it was a delicate dance of acknowledging the opposition and the alternatives present meanwhile showing how the WIT strategies would add value to students’ work products.

Embedded within the train-the-trainer model is the goal to cultivate new SI facilitators from within the school. As facilitators were weathering the challenge of learning and leading the model, their gaps posed a difficulty in adequately modeling and training other team members to take on the facilitator role. Additionally, growth areas in SI facilitators also had impacts on phase III of Strategic Inquiry, moving colleagues. Gallimore et al. (2009) posit that the quality of the facilitator is key in shaping the experience of team members and subsequently their ability to carry out the inquiry process with fidelity. Therefore, with SI facilitators leading the model while still filling their conceptual gaps via their monthly trainings, there are implications for the final phase of successfully imparting the knowledge and processes of SI to other teachers and leaders in their schools.

Wide-ranging challenges met the facilitators as they led Strategic Inquiry in their schools. Staff members’ previous exposure to other models of inquiry or writing (and even lack of previous exposure) had the ability to stymie the work as the facilitators worked to keep all team members motivated and working in cohesion. It is important to note that each of the schools had multiple facilitators spread throughout the building teaching and leading Strategic Inquiry for the instructional staff. Although navigating tricky waters of pushback and pressure, this model took the pressure off the principal to
be the main instructional trainer in the building. Another finding was that participants, school leaders especially, found that having facilitators working with teachers in different corners of the school helped to increase spread and the potential for accelerated improvement.

**Facilitators as Leaders to Accelerate the Change Process**

In leading inquiry teams at their schools, SI facilitators took on the role of helping to accelerate some of the school’s improvement goals. Some facilitators had teaching responsibilities themselves, but as SI team leaders, their profiles in the school were elevated because of the importance of their work in the turnaround process, which was a deliberate, strategic design element on the part of the district-level staff and the SI trainers. Facilitators became trained agents of change deployed in their own schools to lighten the load of the principal and create cohesive pockets of improvement activity all throughout the school.

Jaquith (2013) writes, “Principals can increase the instructional capacity of their schools by creating opportunities for teachers to collaborate as they use key resources to improve teaching and learning. This is easier said than done” (p. 56). Indeed, by empowering the facilitators, principals were able to spread pedagogical and collaborative practices to teachers without hosting and leading a formal professional development session or workshop. Leveraging facilitators to lead inquiry teams was easier said than done.
From the district level, there was a level of intentionality that Mr. Christophers, a Director at the district who oversaw the work, discussed. He said,

I think it’s a little bit of developing leadership, developing teacher teams, developing inquiry approach in schools, coaching pedagogues, developing teachers as leaders so they can build capacity in schools and become the ones that support other teachers.

The teacher leaders, named Peer Collaborative Teachers in some schools and Small Learning Community Directors at others, had support responsibilities over their peers but not evaluative. That gave the facilitators (those who were not Assistant Principals) a dichotomous path because they were charged with leading their peers in a model but could not hold them accountable. That is an element of the “easier said than done” that Jaquith (2013) writes about. Facilitators reflected on their significant roles in leading inquiry at their schools as mid-level leaders who are ultimately advancing the change agenda.

Mr. Meadows, principal of East HS, with a staff of over 200 teachers, spoke about the way the school strategically uses the inquiry team facilitators to support instructional improvements. He explained, “All those inquiry team leaders that we have, they’re the ones that are conducting the professional development for the other teachers. So, it is built into a small learning community.” Embedding the professional learning opportunities into an SLC creates a school within a school, where the facilitators use their skills from the SI training to lead the development of teachers under their purview. Further, Mr. Meadows relayed,
The PCTs will meet together to figure out a need that’s going on as far as instructionally or in order to support teachers with assessment practices or feedback practices and then conduct the different workshops throughout the day that the teachers can sign up for. So, the system is all there based on the teacher need, student need, and it’s all delivered by the identified teacher leaders that are in the building.

This virtuous cycle was embedded into the schedule so that teachers had common planning time to meet in inquiry teams regularly to analyze data and plan for interventions. If the principal was the one leading all sessions, there would be limited opportunities because of scheduling impossibilities that do not allow for the entire staff to meet together regularly. Ms. Humble described the value of having inquiry built into the culture so that being on a team and working collaboratively with other teachers is a basic expectation of working at East HS:

So you’re a leader whether you are in your classroom, you’re a leader whether you’re collaborating with you other teachers, you’re a leader on a school level, or a leader, you know, just with your colleagues. And the buy-in is right there because nobody’s buying in. It’s just part of everyday life, everyday instruction.

The training of SI facilitators in East HS allowed the principal to share the leadership task of instructional improvement and allow for leadership to live beyond the members of the school leadership team. The profiles of SI facilitators began to rise as they were seen as leaders of their peers working together to accelerate outcomes with the students they serve.

Another element involved in deploying SI facilitators as leaders in the school is the feedback loop created to keep the school leadership team abreast of what is occurring
in the various inquiry teams throughout the school. Mr. Khan, principal of West HS, described this process:

Our PCTs are consistently trying to support each other in terms of professional development, and then they lead sessions of professional development with other teachers. They also come in and develop the cabinet, right. They turnkey a lot of information that they receive and facilitate meetings with the cabinet, the APs, and the entire staff.

Because the cabinet, often the principal and assistant principals, are not leading the professional development sessions themselves, they created a mechanism for the SI facilitators to bring lessons back to the leadership level so that there is a broad picture of what school improvement goal attainment looks like in each corner of the school and collective strategizing.

As West HS has seen the value in this model of empowering leaders to accelerate change, they have increased this pool. Ms. Thornhill explained, “We went from, you know, one PCT leader to 2, to 4. Next year it’s going to be 5.” Mr. Blast, a PCT at West HS, when asked if the SI training impacted his ability to lead change in his school, he replied,

I think I’m definitely looked to as a leader in the building for advice and encouragement. I think because of my position as an inquiry team leader, I was able to gain a little bit more respect with my peers, and therefore able to enact more initiatives and more change within the building overall.

As an SI facilitator, he is seen as an authority because of the knowledge that he possesses and the way in which he is leveraged strategically by the leadership team to serve as a support to his peers in “enact[ing] more initiatives and more change.”
At North HS, principal Ms. Tristan described the strategic diffusion of SI facilitators to different parts of the school akin to spreading/planting seeds. She explained,

[The SI facilitators] were the people who knew how to do the inquiry process through their training. They were the people who had done the strategies in year one. They had done inter-visitations [to other schools] around the work. So they were to be the kind of seeds to then be spread into the other grades.

The metaphor of seeds, which will recur throughout this chapter and the next, shows the way in which Ms. Tristan expected growth (student and teacher) as a result of placing these trained facilitators to lead change throughout the school.

SI facilitators did not take lightly the responsibility that they had to act as envoys of the leadership team to improve outcomes. Ms. Smith, a PCT at North HS likened herself to an administrator: “[The sessions] enabled me to get the training, almost like an administrator, to develop other teacher leaders within my team,” which underscores a culture shift facilitated by Strategic Inquiry. Although Spiro (2013) writes that effective principals shape the course of the school from inside the classroom, SI challenges that prevailing wisdom by setting up a structure in which principals share the responsibility for improvement. Principals have this confidence because of the training that the facilitators received. As Ms. Tristan explained, the facilitators “knew how to do the inquiry process through their training.” Therefore, she spread them throughout the school. Ms. Smith viewed the responsibility of being trained and then leading a group of her peers akin to being “like an administrator” because the role of being the teacher of
teachers was preserved for the principal as the instructional leader. SI theory of change eradicates that thinking and allows the principals to share the responsibility of growth with teachers who are equipped with skills to lead in this effort.

Entrusting teachers to lead professional learning for their peers is not intuitive for school leaders. Dr. Panero, a designer and trainer of SI, explained:

We started with this idea that if we believe that high schools, that leadership in high schools needs to be distributed, that the sole leader doesn’t really penetrate the different departments and different parts of the complex high school, then we thought, well, we shouldn’t be training individuals, we should be training teams.

As the principals in the study explained, with such a large staff, it is strategic to allow for trained teachers to serve as agents for change because it is impossible for the principal and/or their assistant principals to attend and lead every department, grade level or SLC team meeting. The use of SI facilitators allowed for the training of teams of teachers to lead the improvement efforts in their own classrooms.

Additionally, Louis et al.’s (2010) finding that, “[W]hen principals and teachers share leadership, teachers’ working relationships are stronger and student achievement is higher” is important to note (p. 37). The SI process not only raised the profile of the facilitators, but was also a strategic route for school improvement because sharing leadership with teachers can improve teacher collaboration and student outcomes.

Further, the collaboration created perpetual learning cycles as teachers uncovered more about where students struggled and how to craft interventions in response. Ms. England at North HS explained, “As me being the team leader, I was doing inquiry work around
the other leads in my building. That was a very different stance for me as a learner.” For Ms. England, there was a blurred line between being a leader and being a learner because through her leadership of inquiry in her school, she continued to learn how to better serve students and teachers.

Mr. Noris reflected on the outcomes that he experienced since becoming a SI facilitator:

Last year, I became an inquiry team leader and I led a group of course content teachers. We had an English teacher, a math teacher, a few social studies teachers, and a special education teacher. We identified target students and we moved them. I was in their classes and with that team we had about 70% passing rate with the students in their Regents.

As an SLC Director, a peer to his teacher colleagues, Mr. Noris had the training, skills and trust of his principal to lead a team toward increasing student achievement on a statewide exam. This accountability metric is one that the school would be judged on in their improvement trajectory. Therefore, allowing a teacher to lead this effort gives a great deal of credence to Strategic Inquiry. Principal Meadows explains, “The system is all there based on the teacher need, student need, and it’s all delivered by the identified teacher leaders that are in the building.” The formula seems to be teacher need combined with student need and trained SI facilitators can equal improved outcomes.

Participants found the Strategic Inquiry facilitators and the model’s practices to be pivotal in shifting the culture of the school to a more collaborative nature. Where teachers previously worked in silos, doors were being opened for peers to learn from each other toward the goal of student learning improvement. Phase III of Strategic Inquiry sets the
parameters for team members to spread their findings to others who are not a part of their teams to share their learnings of strategies that were successful in impacting students’ academic performance. Also embedded in the training were opportunities to learn from other schools engaged in implementing Strategic Inquiry. This collaboration allowed for schools to see other examples of implementation and even share their challenges and possibly learn ways in which other teams approached similar issues. What emerged from the study was that facilitators coupled this visitation expectation with their newfound strengthened collaboration in their schools and found it as insightful to visit schools in their own building as it was to venture to observe external teams.

**Facilitators’ Value on Intravisitations**

As an element of the training, SI facilitators were given opportunities to visit other schools implementing the model to share and learn lessons. These intervisitations were arranged by the SI trainers. Talbert et al. (2012) write about this process:

> The host school defines a problem of change and invites one or more school teams to participate in the problem solving process. The visiting team collects data and provides an outside perspective on the problem (p. 7).

A key finding from the interviews is that facilitators placed as much value on intervisitations, opportunities to see SI teams from other schools in practice, as they did on intravisitations, observing and sharing practices with teams within their own school. (Note: The term “intravisitations” is used throughout this report to signify visits that occurred among teams within their own school.)
Mr. Blast discussed the collaborative feeling of seeing other teams in action and being able to relate to their experience because his team shared at West HS shared the same journey. He explained:

Being there with other teachers who were in similar positions to us, as far as the school is concerned, as being in a Renewal list, but also teachers who were of the same experience level and same interest in leading in their school, it was pretty invaluable to know that you were a part of a group of people working on similar problems. Even though your problems may be different, they are approachable through a similar structure.

The shared experience allowed for cross-learning for the facilitators during intervisitations.

Additionally, the value in these intervisitations continues beyond the training experience. Mr. Blast reflected:

It was really valuable to know that teachers from other schools were there with me, and I built some friendships that allowed us to communicate with one another about our work. So it developed a professional community, really, that I still would feel comfortable depending on if I had any questions.

The development of a longsuffering group of critical friends was another outgrowth of the intervisitation experiences. Despite the training no longer occurring, Mr. Blast and other facilitators can continue to connect with colleagues at other schools to share ideas and learn from each other.

While SI trainers were arranging for visits to external teams, facilitators were mimicking the practice and traveling across their own building to learn from other facilitators and other SI teams within in their own school. Similar to Mr. Blast’s thoughts
on intervisitations, Mr. Harry explained her shift in thinking due to his experiences with intravisitations:

We use a series of inter-visitations that as we visit each other’s classrooms have broken down some of the traditional four-wall barriers to get into other classrooms and created the process and framed it in a nonjudgmental way to keep teachers focused on certain practices in the classroom, the WIT practices in these cases.

Mr. Harry’s reflection on teams visiting each other within their school, using a guiding lens to observe practices and provide feedback shows the emulation of what occurs during intervisitations, venturing to another school to engage in the same practice with a team working with students with whom they are not familiar. Given that the size of West HS, approximately 1,800 students and 130 teachers, such a scope provides a picture into how SI teams in different parts of the building can be not fully abreast of the process and learnings of other teams. Therefore, simply visiting an SI team within a facilitator’s own school can provide a great deal of new knowledge—similar to the value of liaising with a team from another school.

Ms. Thornhill described a practical example of the use of intravisitations (referred by her as “intervisitations”) at West HS:

We’re gearing up to do an intervisitation next week where the teachers are going to try a new formative assessment and we’re going to tennis chart the results of all of the teachers and get that data together to see how well the teachers are implementing this new formative assessment that we’ve learned.

In vetting a new assessment tool, the inquiry teams are sharing products with others within their own building in order to see the impact of the intervention. As Mr. Harry
explained, this practice of breaking down “the traditional four-wall barriers” within the school allowed SI facilitators to see the value of learning from teams within their own large building using the same intervisitation protocol, which ultimately worked to further foster in-school collaboration. As a result of this learning, Ms. Thornhill offered, “I’m like such a huge advocate for collaboration now...you’re suddenly aware of everything that’s happening around you.”

As the school that attends an intervisitation, a goal is to learn from the host school. Ms. England discussed her experience hosting an external team’s visit to North HS:

> We had visits, twice, which I think there’s nothing better for our own school. It was a very positive experience when we had assistant principals from other Renewal schools come in and observe our inquiry teams in action and also visit classrooms. We got a lot of very positive feedback and, of course, more feedback for next steps.

Therefore, the host SI facilitator at North HS received valuable advice from the teams that came to visit. Reciprocal learning occurred for both parties as they were able to reflect on each other’s practices via North HS being open and vulnerable to open their doors to outside facilitators and their teams.

Another value that facilitators saw in being the host team for an intervisitation is the visibility that members of the inquiry teams receive. Ms. England said, “I think that gave the work a lot of validity for the teachers who are not part of train-the-trainer [sessions], who were getting it from us, to then hear from other people who were both administrators and peer collaborative teachers from other schools to say, ‘well, I like how
you did this or can I get a copy of that.’” Facilitators, as the only staff who attend the SI training sessions, had the opportunity to learn alongside facilitators from other schools also implementing the model and receive a more nuanced look at the work from various perspectives. Serving as a host school during an intervisitation gave the teachers on the teams a similar chance to hear from external teams, showcase their work and be more connected to the broader SI community of learners.

Ms. Smith at North HS also expressed the value in not having to go far to experience the benefits of a visit from another team. Inquiry teams in North HS visited each other to offer a differing lens and thereby a new viewpoint. Ms. Smith explained, “We also had intervisitations that were done within our own school because we have four small learning communities, so from my small learning community teachers went to another one to see what they’re doing because the focus may not have been at the same time throughout the year, so with a different lens to see what the other teams of teachers were doing and how they were implementing and how they were interacting at their meetings.” One team served as a fishbowl while the other team (from the same school) observed their process and took away lessons to be implemented while serving different students but within the same student body.

The process also includes taking keen notes on what the observer sees and hears, low-inference transcripts. Per Ms. Smith, “The teacher leaders performed LITs on each other. I went and observed Ms. Parker’s team and then we reflected on her meeting, she came and visited mine.” While Ms. England reported a very validating and reassuring
outcome from serving as a host for an intervisitation, there are instances in which visits can result in feedback that is hard to hear and hard to share:

We did some school-wide intervisitations of our own inquiry. Each peer collaborative teacher and assistant principal observed the other people’s common planning time inquiry meeting and we did low-inference transcripts of each other. That was hard to share that, but I felt it was grounded in practices people had done for observations and things like that but we’d never done it for inquiry.

In the end, participating in these visits, whether internal or external, is a vulnerable task because facilitators had to be ready for whatever feedback emerged. Ms. England summarized that experience in a positive, developmental manner because she found the teams’ key takeaways to be, “‘My team struggles like your team struggles’, or, ‘I like other team does this at their meetings. We never tried it that way.’” Though difficult to give and receive critical feedback, Ms. England described that as key to the learning process, “For them to be able to see that was very powerful.”

East HS, as a school that had a longer history with Strategic Inquiry, was often used as a host site for intervisitations. Their facilitators were trained in the previous iteration, SAM, which was connected to a higher education school leader certification program. Inquiry teams at their school were more mature than teams that were launched at the beginning of the train-the-trainer sessions in the Renewal program. Ms. Donaldson explained:

At Renewal meetings, we were seen as a site. A lot of schools come to [our school] for sort of, I guess, research on different systems that we’ve implemented and the sharing of our system. In that capacity, they were able to see it in action.
While sharing the systems in place at East HS, Mr. Noris also found it useful to leverage those conversations as teachable moments focused on how visiting schools systematized and tracked their inquiry work. He said of a visit, “It was very beneficial looking at it from how different schools are implementing it, the different systems schools have in place.”

Though the schools shared their practices and successes, Ms. Godfrey warned against getting too excited about ideas generated from intervisitations:

If I were to describe that experience, I would say that it was—one thing that I walked away realizing is that just because I’m working with another school or another team of teachers, say, for example, who are teaching the same grade as me, ninth grade, didn’t necessarily mean that what they narrowed down as the focus of their inquiry would work for my school. I realized that it’s not ... Strategic Inquiry is not this uniform thing. It really had to be tailor-made for your school and your demographics.

The lesson was to take the observations from the external team and look at it in context. There was a keen caution to fight the urge to adopt, but actually focus on adapting the strategies that work elsewhere to fit the context of your own school and the students you serve.

In discussing the value of intravisitations, the key takeaway from East HS is the importance of building this type of collaboration into the culture of the school so that such visits are not seen as an invite but they are a routine element of how teachers work and learn together at the school. Mr. Noris offered a specific example of this in relation to the implementation of the writing initiative. He said, “With WIT, we have a culture of intervisitations, and we give feedback to each other on what we’re seeing and student’s
writing, different strategies.” This shows the school working together on a school-wide writing initiative that is new to students and teachers alike. Focusing the intravisitations on observing how teachers from different teams across the school are implementing the writing work and the outcomes in student work builds this peer feedback structure into the school culture as WIT also takes hold in the instructional model.

Principal Meadows further explained the way in which the intravisitations have been valuable at East HS. The practice has moved from facilitators having their inquiry teams visit each other to teachers bringing artifacts to receive feedback from their colleagues during weekly “peer collaboration days.” He explained:

Recently, they have started videotaping lessons and then a group of teachers will sit down and look at the lesson, you know on tape, and find feedback, and the person who’s teaching it can reflect on what they see. So that’s I guess just an outgrowth of the foundation that was laid this year and the year before and the year before. That’s the point we’re reaching now.

Again, opening up your inquiry team or classroom to be viewed and reviewed is a level of vulnerability that facilitators thought required capital. This level of trust was built in intervisitations because the facilitators and their teams had the shared experience of learning and implementing SI together, but at different schools. Within a school like East HS, this familiarity was built over time as the facilitators and the school leaders built such collaboration into the professional development model so that teachers would feel comfortable working together in this manner and using their fellow teachers as critical friends.
The reported fruits of observing other teams went beyond the school-based teams focused on student academic growth. The study found that all participants, facilitators, principals, district officials and SI trainers alike, kept a pulse of the challenges faced in implementation, the ability to use facilitators to accelerate the spread of new strategies and the value of visiting other teams. These findings culminated in methods of using Strategic Inquiry strategies and lessons from implementation in new and expanded ways. As participants evolved the model, they began to use Strategic Inquiry to focus on improving student attendance, facilitator effectiveness and even school leadership teams.

**Multiple Levels of Inquiry**

Though school-based Strategic Inquiry facilitators were trained to use inquiry as a method of identifying where students were underperforming academically and craft interventions, the interviews revealed that SI was being used in other arenas within and outside of the school setting. Conversations with district staff, SI trainers, principals and facilitators showed that the practices of Strategic Inquiry had multiple utilities and the original intent morphed to serve other purposes. This evolution was best summarized by Mr. Khan, principal of West HS:

> Developing the process and training staff on the process of inquiry has really allowed us to expand our approach to inquiry, right. It’s, once again, about building capacity. We’re a data-driven school. You know, from the top on down we really are consistently looking at data. And it gave us a way to train our teachers, our staff members to look at data.

Viewing Strategic Inquiry as a method of viewing data to make evidence-based decisions is the basis of the evolution of the use of SI by those who have been trained.
At the broadest scale, the SI trainers reported using inquiry to view the progress of the schools vis-a-vis the facilitators being trained. Ms. Hirata explained that they held what became known as “Friday meetings.” She elaborated:

Those were our learning days. There were about six of us. Sometimes we had professional readings that we talked about. Then, we had goals. We made up goals, and then we looked at some of the work that was given to us by the different cohorts to see what was needed and what evidence from the schools would show their progress. Then we would separate to plan.

These sessions were pulse checks on the development of the SI facilitators, the gains that their schools and teams made and next steps for improvement.

Similarly, Dr. Panero explained this inquiry process at the macro level in the same way, “And by the way we also did inquiry among the [trainers]. We identify this is the learning goal I have for this person, and then we would look at, we would use the same tools, we would look at the evidence, and then we would norm.” Using the SI facilitators as their target population, the trainers’ process would yield next steps for the learning of the facilitators. The interventions that they subsequently crafted would be the basis of the pedagogy for the next training sessions. Finally, the evidence would be artifacts that facilitators would bring to show that their skills or the practices of their inquiry teams improved, aligned to the target.

At the time of Ms. Walker’s interview, the district was no longer funding the SI trainers to support the schools. Therefore, it was a surprising finding to hear that at the district level, Ms. Walker and her colleagues put a practice in place that mimicked the Friday meetings that Ms. Hirata and Dr. Panero described. Ms. Walker said, “We meet on
Fridays as a team and share best practices.” When probed to learn more about the structure and goals of these meetings, Ms. Walker said, “Our district meetings are focused on designing effective PD for the principal meetings, but I always tried to make time for directors to share what was working or not working or where their stuck points were.” Additionally, she shared,

Sometimes in a school, you’re coaching a leader or you’re trying to get a leader to do something and you need your colleagues’ feedback on what might work with the leader and how you know the leader is finally getting it.

Though not naming the meetings as inquiry team sessions, Ms. Walker described a similar process of meeting on Fridays to assess the progress of a target population toward growth goals. Directors use their peers as critical friends to share best practices and identify what evidence would show that their coachees are progressing.

Mr. Christophers discussed ways in which district staff intentionally used Strategic Inquiry practices when working with principals to expose them to the routine and increase principals’ awareness of the training that the school-based facilitators were receiving.

We adapted the tennis charts instead of around writing, we adapted them around teacher practice and we tried to break down the Danielson framework into sub-components to try to get as granular as we can, and create tennis charts. Teachers, you identified as your focus group. And then the approach was, ‘How are we going to move the practice of these teachers?’

Teachers, instead of students, became the focus of the inquiry as district staff worked with principals. Additionally, Mr. Christophers then articulated the cycle of Strategic Inquiry. However, in this instance, the focus remained on teachers instead of students:
And then you visit, you get a baseline using the tennis chart and then you identify the skill you are going to work on and then you come back and work on it for two weeks and then decide how you’re going to work on it; PD, coaching, feedback, whatever you think and then you come back in two weeks and you assess the impact.

This was a deliberate effort on behalf of the district staff to engage the principals in inquiry and adapt the SI processes to a focus on teachers to show principals the utility of the process at multiple levels. Unlike Ms. Walker, Mr. Christophers was cognizant that he was mimicking a practice from SI and named it with the intention of spreading the practices.

Moving to the school level, there was also evidence that the Strategic Inquiry model was being used in ways other than a direct focus on developing student skills. Administrative teams, or cabinets, used inquiry to monitor the progress of those to whom they distributed the leadership task of staff development, the SI facilitators. On behalf of West HS, Ms. Thornill explained:

There’s a lot of different ways that the school is implementing inquiry. Before we were just doing it at CPT [common planning time] meetings and now we do it at an administration level too, where the APs walk around with the peer collaborative teachers and they’ll go into a room for 10 or 15 minutes with a tennis chart that they will use. Then, we’ll have a meeting at the end of the day and discuss what we saw and that helps push us to the next level. The tennis chart serves as the map of the evidence of specific skills that teachers were supposed to exhibit in their pedagogy or skills expected to be seen in student work as a result of the recent/current inquiry cycle.

Including the PCTs in inquiry led by the administrative team shows the way in which the cabinet does pulse checks to vet the real-time progress that teams are making toward the academic improvement goals. Shifts are then made based on the learnings as the school
leaders assess how better to support SI facilitators as they work to develop the teachers on their teams. Ms. Thornhill described the benefits of this process and refrained that inquiry is “plentiful” at her school.

Ms. Walker also explained this the iterative process of inquiry that occurs among schools’ administrative teams:

In the big schools, we had a process that we call cabinet inquiry where we have the leader and APs working together to use classroom walkthroughs to make decisions about teacher PD. We actually created a parallel process for what teachers are doing with kids, we did with the APs with the teachers as their students so, in cabinet inquiry, we would use a process similar to what teachers were doing with their students to track progress on teacher implementation of priority areas.

This sequencing is a more clearly articulated description of the way in which the administrative team emulated the inquiry process with the staff as the area of focus.

There was also evidence that school-based SI facilitators were meeting together to use the teachers on their inquiry teams as the basis of study. Ms. Donaldson, from East HS, explained:

It works on the student level. It works on the teacher level. Being able to provide professional development to teachers through observation cycles and feedback cycles and identifying where a teacher needs to improve and figuring it out and sort of categorizing it in a way that maybe was not differentiated or specific to teacher need was changed.

Similar to what Ms. Hirata and Dr. Panero described, SI facilitators were using their inquiry cycles to identify how best to support teachers in the PD next steps. Understanding the skills and areas of growth for teachers presented another added value.

Ms. Donaldson concluded, “The entire system of pairing teachers as an integrated co-op
teaching partnership and figuring out where teachers’ strengths are, I use strategies of Strategic Inquiry.” Therefore, the results of the focused inquiry cycle drove ways in which SI facilitators, in their roles as PCTs or SLC Directors, made decisions about which teachers would be complementary co-teachers.

Further, Mr. Harry gave a more granular example about how the results of the inquiry helped the SI facilitators to better support their teachers. He explained,

Professional development—that was the other area. We use inquiry to do professional development. So we could differentiate the type of professional development. We actually t-charted the teacher skills so we could differentiate the professional development we do.

Strategic Inquiry in this manner provided the staff in charge of teacher growth the data needed to craft training that was closely designed to respond to the needs of specific teachers.

The final level of how interviewees portrayed the use of Strategic Inquiry outside of the trained method of analyzing student academic growth areas comes as schools used inquiry for non-academic targets. Mr. Noris explained:

This year, the Small Learning Communities did a big push on attendance inquiry, for how can we improve students’ attendance, so obviously it’s not only academic, it’s also attendance. Students are not in school, obviously, your academic inquiry does not work because the students are not there to get the intervention. The Small Learning Communities really focused on attendance inquiry, and we tracked students, and we had our interventions. I think that was the beauty of SI—that it went beyond.

Though being trained to use inquiry to move student academic gains, Mr. Noris shows that his team realized that the processed could also be used to explore what was impeding
students from coming to school. Rightfully articulated, if they were successful at improving the attendance, then the teams could widen their net and serve more students with the academic inquiry.

The principal of North HS, Ms. Tristan, also explained the value of using Strategic Inquiry in non-academic ways:

One of the things that we were able to see was that now that all of the staff has been trained in the academic inquiry, there is a looking forward component of creating academic inquiry teams versus social emotional and attendance inquiry teams. So, that’s going to be part of the work moving forward that there will be two different groups of inquiry teams thematically in each of the smaller learning communities. And that can only happen when the inquiry cycle has clearly been established.

Ms. Tristan’s reflection shows the maturation process; after the staff is trained in the foundation (academic inquiry) then they could expand their lens to address other efforts equally important to improving the school—social emotional needs of students and pupil attendance at North HS. This evolution of the use of Strategic Inquiry by all respondents comes back to the framing provided by Mr. Khan: “We’re a data-driven school. You know, from the top on down we really are consistently looking at data.” From the top, SI trainers and district staff, down to the school, teachers and students, the main focus was an analysis of data to understand the next steps in the development of the target population. Whether the unit of study were the SI facilitators, the principal and cabinet, PCTs and SLC Directors, teachers or students, the interviewees found and explained the different ways in which they used the practices of Strategic Inquiry in non-academic ways to seek improvements in data. Appendix E shows a summary of the inquiry team
members, target populations and sample goals in the various iterations of how the Strategic Inquiry practices were emulated to impact outcomes that were not directly related to student academic skill development.

Much of the findings from this study came from the inductive approach taken in the interviews. Participants’ reporting of their experiences in the implementation of this iteration of Strategic Inquiry were broad and encompassed many different areas, but they also converged in key areas. Although the challenges often had intrusive effects, the resilience of the facilitators was evident as they worked through the pressure to push for stronger collaboration among their colleagues with student growth as their north star. Through the discussions of the challenges and some of the successes that the participants self-reported, there were also suggestions for improvement that facilitators felt would have enhanced their learning and implementation processes. The suggestion that recurred the most was a desire to have exemplar schools available for them to visit and learn from in the midst of their own learning. Participants saw that possibility as both an anchor for learning and encouragement for where they were headed with their schools and their teams.
CHAPTER 5: DISCUSSION & IMPLICATIONS

Because of the prevalence of school turnaround programs in the relentless quest to find what works for improving struggling schools, data and findings in this study might be attractive to school districts and school improvement programs alike. Therefore, it is important to itemize areas that might warrant further study. These implications range from macro level—district relationship with the external school improvement vendor—to micro level—understanding if Strategic Inquiry practices actually have an impact on student achievement data. Although the findings offer some examples of self-reported successes, there are elements in this discussion chapter that are pivotal to understanding why it is important to understand the intricacies of the Strategic Inquiry model of school improvement to learn lessons that might be transferrable to future adopters. This section will present examples of implications for further research that came from this study as well as interview evidence that supports each topic. Given that this overall report has considerations for different types of practitioners, each upcoming section will suggest an audience for the implication and how the evidence might relate to the potential adopter’s work.

In this iteration of Strategic Inquiry, the district played a key role in sponsoring the model. Strategic Inquiry was chosen to serve as the main strategy to reform about three dozen high schools initially. However, this study showed that there were other initiatives also being infused that competed with Strategic Inquiry. The discussion of the role of the district is an opportunity to have adopters reflect on elements of the proper
structure that must be in place to sustain a school improvement strategy from the district level. Essentially, in crafting the relationship with the school turnaround program that can be pivotal to the success of a struggling school in the district, what safeguards should be put in place to ensure that the work continues uninhibited?

**For District Leaders: Reinforced School Improvement Vendor Relationships**

One of the assumptions in the conceptual framework for implementing Strategic Inquiry in Renewal schools is that resources will continue to be provided to support and sustain the work of the SI facilitators. Further, the first section of the logic model is resources, specifically the district’s financial support to continue the facilitator training and implementation of Strategic Inquiry. These financial resources, coupled with the human resources, space and materials are the pivotal first steps in moving along the logic model’s continuum to arrive at the desired long-term outcomes of the benefits of training school-based SI facilitators to lead inquiry teams in the struggling schools. Meyers and Smylie (2017) write, “Given that many important sources of school failure and success are systemic in nature, it seems that lasting school-level improvement needs to be initiated or sparked and championed by district leadership” (p. 519). This thinking underscores the importance of the district serving as a foundation for supporting the improvement effort and ensuring that the implementation is uninterrupted.

In conversations with interviewees for this study, it quickly became clear that there were interruptions in the learning and support of Strategic Inquiry facilitators during their training. What was supposed to be a full three years of training was cut short for
reasons that were not fully clear, given that different subjects had varied interpretations about what led to the shutdown of the training. Ms. Thornhill described the confusion, “I don’t know what the whole deal with the DOE and [the SI trainers] and you know, Strategic Inquiry, was where suddenly meetings were getting canceled and everything was kind of haywire.” Dr. Panero initially described the haywire as the SI training organization being owed money from the DOE and being in a holding pattern as they worked through what appeared to be contractual issues. Whatever the issues were that prematurely sunsetted the training of school-based facilitators in the SI model during the middle of year three, there are implications for the central office decision-making process and the impact of the district redirecting resources in the midst of a school improvement initiative.

The impact on the facilitators and the schools stood out during the interviews. From the district staff members’ perspectives, this interruption was an element of the district shifting their attention to other initiatives while SI was underway. Ms. Walker had the impression that even before the big stoppage, SI was already being deprioritized as the district dabbled in other strategies while SI was being implemented. She explained, “I think sometimes [the district] has a lot of things they want schools to do so they rolled out mandated intervention strategies and I think that that’s been a distraction.” Further, she emphasized the stress placed on schools implementing SI when they are also being mandated to train in another program: “I think that that pulls the same people that are trying to implement SI and inquiry in schools out when they would be better off being in
the building.” Shifting priorities or exploring multiple turnaround strategies at once has the impact of diverting resources, funding and staff. As Ms. Walker explains, it was often the same school staff, SI facilitators, who were charged with leading Strategic Inquiry in their schools meanwhile being called away to learn other models.

Even from the district level, it was clear that the shift to other models sent mixed messages to the schools implementing SI. Mr. Christophers articulated the messiness (and the haywire, as described by Ms. Thornhill) that the schools experienced during the transition period:

[The district] was very much committed to SI through 2014 and 2015. And last year, they started really shifting their focus to [another program], and part of it was trying to figure out how to integrate the two, but I think they’ve become much more around [the other program] than around SI.

For facilitators trained in the SI model for two and a half years, now being invited to learn another model as the district shifted their resources demonstrated “competing agendas,” per Mr. Christophers. According to Dr. Panero, the other model of inquiry, while appearing similar on the surface, is actually grounded in a very different and in some ways contradictory theory of change.

In the end, Mr. Christophers said that the district’s new improvement strategies for the Renewal schools is “sort of a hybrid, but it resembles more [of the other program] than I would say SI.” Facilitators felt this shift and the pull of the competing priorities as a result of the bureaucratic shift in district school improvement resources. Ms. Donaldson lamented on the disruption in her SI training, “Last year, for train-the-trainer, we went, I
think it started in October/November. We went for two sessions, and then there was a hiatus and then it started up again at the very end.” However, when the sessions started again, the district was now training facilitators on the new model that Ms. Walker and Mr. Christophers described and the SI trainers were not present.

Although the district attempted to sell the facilitators on this hybrid of the new model and Strategic Inquiry, Ms. Donaldson described a sense of a cliff hanger and unclosed loops with her own training and the work that East HS was engaged in with SI:

What we didn’t do this year is figure out how everything that we’ve done and all the work that we’ve done without let’s say ‘renewal’ and, when I say ‘renewal’, that’s really just resources. We need to make sure that all the systems and the work that we’ve done as far as inquiry is concerned is continued.

Therefore, the district shift in resources did not dissuade Ms. Donaldson and her inquiry teams. There was still a desire to continue the Strategic Inquiry work and vet the results of their interventions.

At North HS, Ms. Nolan discussed her recognition of the deprioritization of the SI initiative and her thoughts for the future of SI at her school:

I would say so far as WIT, because on the more, I don’t know, systemic level of how it is being rolled out by Renewal schools, it’s been de-emphasized this year and part of the past year, but I do think that paying attention to our students’ writing and naming levels in an explicit and meaningful way should continue and be a focus.

Similar to Ms. Donaldson, Ms. Nolan felt a connection to the SI work and a desire to sustain the writing strategies even though the district’s resources and training had an otherwise focus.
The feeling that a key part of the training was missing and forfeited by the stoppage was expressed by Mr. Blast. The facilitators felt primed for the next step in their growth and the evolution of their SI work with their teams, but “the third year, it was very disjointed in the fact that it got cut off halfway through the year,” Mr. Blast explained. He continued, “You could tell that the intention was to really try and start expanding the learning that I had had, and had within my teams, and try and get things out into a larger, school-wide initiative.” The final phase of SI is to share viable instructional interventions with other colleagues within the school and Mr. Blast got the impression that the “intention” was for the facilitators to be guided in that step next, if the training had not been halted.

Ms. Thornhill was candid about her frustration when the district tried to present a hybrid of SI and a new model after “some issue” with SI as an organization had occurred. She said, “I don’t know what was going on, but where we didn’t go to all the sessions. They were getting canceled and then suddenly [the district] took over doing the meetings.” While the district tried to shift the schools to a new model, the competing agendas that Mr. Christophers discussed were evident to the facilitators. Ms. Thornhill described a session in which she felt compelled to take over the training session because the district trainer was incorrectly teaching SI strategies:

So there have been times where things have been—and this wasn’t under [SI], this more under [the district]—where things weren’t, you know, the way they were being presented wasn’t exactly the best way they could have been presented.
She described scenes in which multiple SI facilitators voiced their dissatisfaction with the quality of the SI training that the district attempted to deliver. She concluded, “A lot of people didn’t have a problem raising their hand and giving a better way of doing it.” This shift in district priorities yielded confusion as the facilitators felt wedded to the work that they started at their schools with Strategic Inquiry and equally frustrated about the ambiguity with SI and the new school improvement initiatives being offered to them.

The procedural or contractual issues that the district was having with the SI trainers had impacts on the schools and facilitators’ training and implementation of the model. Districts in these instances may consider exploring long-term relationships with their turnaround programs that build into the agreement ways of resolving issues that do not interfere with the work happening at the schools. The district-vendor relationship woes became a distraction and interruption to the training of facilitators and their ability to lead SI at their schools. On the contrary, Meyers and Smylie (2017) write that the district role should be to “buffer schools from external threats that might undermine initial and long-term success” and also ensure that the improvement work moves in “productive directions” (p. 519). The sudden shift taken by the DOE birthed confusion and frustration for the SI facilitators.

Meyers and Smylie (2017) advocate for the district to play a more sympathetic and supportive role regarding aligning resources to sustain the work of school turnaround. They write, “[The district] can encourage coherence and stability for the hard work of change at the school level” (p. 519). Indubitably, competing agendas and
attempting to share a “hybrid” of SI with another model do not create a recipe for coherence nor stability. The facilitators’ desire to see the work through and learn the next steps in implementation shows that though the district shifted their resources and focus, those closest to the work of school-based teaching and learning advocated for the continuation because of the way in which the strategies became embedded in their practices. Dr. Panero shared their sentiment and concluded, “I’m worried about their ability to sustain it not having more support.” These examples from both the implementers and trainer create a strong case for districts to create mechanisms for resolving disagreements with school improvement vendors and reinforcing contracts so that such disputes do not impact the learning of those responsible for leading the turnaround efforts at their struggling schools.

Though that is a macro representation of an area that warrants further study, at the school level there was expressed satisfaction with a manifestation from the implementation of Strategic Inquiry. Even without the support of SI trainers, principals reported that the deployment of the facilitators in the school allowed for the model to spread and for more teachers to learn the SI process, muting the noise of the district-vendor issues and focusing keenly on the work on the ground. However, some of the outgrowth of implementing Strategic Inquiry was the training and deployment of facilitators who were developed internally and not by the SI trainers. We know from the literature review that the quality of the facilitator is a key determinate in the type of experience that a Strategic Inquiry team member will have. Therefore, the discussion
shifts to what ways can a school or district vet the readiness of a facilitator before
deciding that they are equipped to lead Strategic Inquiry in their schools?

For Principals: Reassurances Before Spreading the “Seeds” of Distributed
Leadership

Schools participating in the study are Renewal schools that use Strategic Inquiry
as their main avenue for improvement and those schools that have reached the level of
maturity that they are training SI facilitators internally. SI facilitators who were
interviewed attended the train-the-trainer sessions sponsored by the district, and these
trainings were intentionally designed so that attendees acquired the skills necessary to
turnkey their learnings at their schools and grow additional SI leadership from within.
Stewart (2014) advocated for this type of professional learning that shifts teacher
development from an individual basis to a collective accountability for each other’s
learning. Additionally, moving along the continuum of this study’s conceptual
framework, the activity of the train-the-trainer sessions serves as a key ingredient toward
the long-term outcome of more teachers being trained in Strategic Inquiry and becoming
equipped to serve as school-based facilitators.

Throughout the interviews, all schools discussed having SI facilitators in the
school who were not developed by the SI trainers, but these inquiry team leaders were
homegrown. An implication for further study is to investigate the quality of the
facilitators trained internally vis-a-vis the program expectations as compared to the
quality of those trained by the program’s designers in order to give principals confidence
needed to deploy homebred facilitators. Ms. Walker, at the district office, explained from her perspective, “I think the thing that I haven’t mentioned yet that I think is pretty significant is training the teacher leaders how to support the other adults around them to learn and become leaders too.” From a district-level viewpoint, Strategic Inquiry would be attractive because the facilitators trained in the model can go on to train others and a cycle of developing instructional leaders can foment. However, further research into these newly trained SI facilitators would reveal the quality and effectiveness of those trained in-house.

Ms. Tristan at North HS spoke about the value that she found in training facilitators within the school. She said, “One of the things that we believe in here is distributed leadership.” Louis et al. (2010) wrote about the principal’s role in setting the conditions for the fostering of teacher leadership in a school. The principal should share the responsibility of being the instructional leader. What Ms. Tristan describes is creating a marriage between training as a facilitator and the specific skills of Strategic Inquiry. She explained, “Our peer collaborative teachers all have specific training in facilitation. One of our peer collaborative teachers together with myself are facilitators from the citywide teacher leadership program.” The first ingredient is the shared experiences of being trained in a model of facilitation. Next, she shared:

Those people that were trained now were in each of the four small learning communities that we had for year two. So they were the people who were trained indirectly through me and through [Ms. Smith], our PCT. They were the people who knew how to do the inquiry process through us.
Ms. Smith attended the Strategic Inquiry train-the-trainer sessions and she also was trained in the citywide teacher leadership program that Ms. Tristan mentioned and that Ms. Tristan herself attended.

Ms. Tristan leveraged the team facilitator expectations and processes from the citywide program and coupled it with Ms. Smith’s training as an SI facilitator to form professional development for teacher leaders in the school. Those trained by Ms. Tristan and Ms. Smith became some of the “seeds” Ms. Tristan discussed who were dispersed throughout the school to lead Strategic Inquiry teams and promote the academic improvement goals with other teachers. Finally, to ensure cohesiveness, Ms. Tristan brings all SI facilitators, those trained by the DOE sponsored sessions and those trained internally, together to assess and plan. She concluded, “We have weekly school leadership which involves the principal, the APs, and the peer collaborative teachers of each small learning community. So those peer collaborative teachers who were not a part of the direct inquiry PD through [Dr. Panero], were trained then through myself, through Ms. Smith, and we had one other PCT train, Ms. Nolan.” While Ms. Tristan places value in training facilitators locally, it is important to vet how well these inquiry team leaders were developed. Outcomes of their team members versus the outcomes of teachers in inquiry teams led by facilitators trained by program staff would reveal key information about how best to train locally. Ms. Tristan describes leadership pipeline development given that she trusts the achievement of school improvement goals to the SI facilitators.
This helps to distribute leadership and hopefully accelerate student achievement, but that can only be validated through a study designed to assess these factors.

From an SI facilitators’ perspective, Ms. Smith found that training internal facilitators shrunk the size of her inquiry team because the newly trained facilitators would subsequently split the team and lead smaller cadres of teachers. Similar to a teacher having a smaller class size, this reduction in team size could allow for more personalized, differentiated support for teachers in the smaller inquiry teams. Ms. Smith explained:

So by the second year I had—usually we have a team of about 25 to 30 teachers. By the end of the second year, I had seven teacher leaders. My team went from a team of 25 to 30, to a team of 15 and 15 to a team of seven and seven to a team of three, because of the ability to take those skills of how to build all those teachers.

Teachers went from individual contributors to teacher leaders to SI facilitators because of their demonstration of the grasping of the SI facilitator skills, per the school leadership’s estimation.

Additionally, Ms. Smith offered an extemporaneous list of some of the skills the leaders looked for (or the process) before allowing a teacher to serve as an SI facilitator: “Teacher buy-in, teachers’ reflection, understanding the strategies, then turnkeying it to other teachers who were willing to take on such a role.” She found that it fostered a culture of collaboration among the teachers and served as an invitation for others wanting to serve in this capacity, and explained:
Last year, I had teachers who were coming to ask for me like, ‘Could I be the lead this year for this particular skill?’ So, a lot of teachers developed their understanding so well in some of the writing skills that they wanted to be able to share what they had been successful with, with a group of teachers.

Ms. Smith did offer that some teachers were given the opportunity to share some of their strategies that have worked with others via leading a professional development session and others became SI facilitators. Further research might create key indicators to help schools decide which teachers were ready to be SI facilitators. At North HS, Ms. Tristan and the rest of the leadership team made these decisions, but validated guidance would help to make these key decisions about who would be fully trained and prepared to lead their colleagues in inquiry teams focused on instructional improvements.

Through observation, schools are making decisions about teachers who should become SI facilitators. Ms. Thornhill, at West HS, with almost a voice of surprise shared:

We also have teachers who become so amazing at it that we have them as leads. We literally let them lead CPT meetings because they’re so good at what they’re doing and we want more teachers to get to that point at which they could lead too and show off their skills and show off how inquiry is helping them and how the skills are helping their classrooms.

This description seemed like putting the teachers on display as inquiry team leaders rather than the true goal of SI facilitators, which is to lead others in the inquiry cycle, identify gaps in student performance and test academic interventions. Allowing others to become SI facilitators seemed to become conflated with a share-out of how inquiry has worked for the teachers, which seemed more like an infomercial than an inquiry team session.
Similarly, the principal at East HS explained the school’s process of naming internal SI facilitators. Mr. Meadows shared, “They were people we had identified through either the APs or through the SLCs that they really seemed to get it and were really able to, not just get it, but were able to act upon getting it and make real changes in their instruction and in student outcomes.” The common thread was that the schools did not have a method of assessing the skills of the new facilitators, but they were chosen because they “get it” and they demonstrated their ability to use inquiry to improve their students’ performance. This doesn’t automatically mean that they were able to lead inquiry well and lead a group of teachers through the process.

It is important to note that though North HS articulated a more systematic approach to selecting new facilitators that they felt were trained well by those trained by the SI program, the other two schools focused their selections on teachers who demonstrated their ability to use inquiry team interventions in their classrooms. Further study is necessary to help schools select only those teachers who are actually trained in the model of Strategic Inquiry facilitation and not just those who “get it.” The principal, as the instructional leader, decides which facilitators are ready to be deployed as “seeds” of the model and can, with fidelity, lead others. This is important because research shows that the success of the inquiry team is predicated on the quality of the facilitator (Gallimore et al., 2009; Panero & Talbert, 2013). Therefore, if these homegrown SI facilitators are not well prepared, there can be adverse impact leading to lackluster SI implementation given inadequate facilitator knowledge and skills. It is, therefore, likely
that those seeds that Principal Tristan spread of new facilitators throughout the school might not bear the fruits of teacher development and instructional improvements for which the school is hoping.

When facilitators discussed why they were chosen to lead Strategic Inquiry in their schools, it was notable that none stated that they were selected because of seniority or longevity in service. Further, as later research might consider facilitator selection and readiness, though teacher tenure or experience level were not used as the sole determinates in facilitator selection, they are key factors that shape the experience that an inquiry team will have. Veteran and novice teachers posed particular challenges to interviewed facilitators because of these teachers’ breadth of experience and/or lack of readiness to collaborate in the way that Strategic Inquiry promotes. Current research offers a plethora of strategies for leaders to manage resistance, but the Strategic Inquiry facilitator role is ambiguous. Therefore, accountability is not automatic if the facilitator is not in a supervisory/evaluative role. Navigating issues of teacher resistance due to experience level is both an area for further study and an element that should be added to the Strategic Inquiry training modules and other similar school improvement programs that use school-based facilitators to lead their peers.

**For School Improvement Programs: Differentiating the Model Based on Teacher Experience**

Through the interviews, the SI facilitators discussed the types of challenges they encountered while implementing while leading Strategic Inquiry at their schools. The
main category of challenge came from teachers due to their unfamiliarity with the practices of Strategic Inquiry, the ambiguity of the process and the lack of instant gratification in the form of quick wins. Earlier, these were outlined in the findings section on challenges that facilitators faced. An implication for further study is the ways in which facilitators were trained to respond to these anticipated challenges. While SI facilitators were able to name some strategies that they employed in their common challenges, when sharing resistance from teachers whom were combative due to their experience level posed more of an untenable situation for the facilitators. Strategic Inquiry, and other school improvement models alike, would benefit from further research in this area as they seek to have the tenets of their models sustained in the culture of the schools they serve.

Veteran teachers, in particular, were mentioned by two of the facilitators, to be their impediment to leading the process given their resistance. Ms. Thornhill shared, “My second group were a bunch of veteran teachers who just really weren’t going to change their ways and I think that’s what made it harder for me as a facilitator of these meetings.” On one level, these veteran teachers did not want to change their methods of investigating students’ struggles and teaching in response. However, what Ms. Thornhill said next offers insight into another way in which she viewed the resistance from the veteran teachers. She continued, “The support I should have gotten was from my school.” Seeking support from the school shifts the problem from the veteran teachers not just clinging to their pedagogical practices, but the issue takes the frame of compliance. To what extent should schools implementing this model be sensitive to teachers previously
trained in different ways and how their mental models might impede the progress of the Strategic Inquiry team? Is this a difference in pedagogical philosophies or should it be responded to as non-compliance/insubordination?

Further, Ms. Thornhill’s impression was that the veteran teachers were combative because of their reluctance to learn a new way given that they are so close to the end of their careers. She shared, “We also have teachers that are a couple years from retiring and, you know, don’t want to change because they’re like, ‘Whatever I’m out of here, I don’t care.’” Unlike other challenges that Ms. Thornhill discussed, she did not offer any solutions that she tried or that were effective in responding to the defiance of veteran teachers. Viewing it as a compliance issue that the school should support enters the realm of employee discipline. Related, when asked about challenges with implementing Strategic Inquiry in the Renewal schools, Ms. Walker from the district office replied, “The unions.” She said it in an offhanded way and then quickly changed the subject.

On the other end of the spectrum of teacher experience as resistance, Ms. Godfrey also discussed the challenge of having novice teachers on her inquiry team. She explained,

This past year, we were dealing with two very diverse populations of teachers. We were dealing with these young, new teachers who just finished their bachelor’s or had very minimal experience, and then you had some of these veteran teachers who kind of had an idea but didn’t want to continue with it.

In one inquiry team, Ms. Godfrey experienced the dichotomous challenges of having little experience and context and having a plethora of experience yet uninterested in
changing. It is important to explore strategies that can be added to facilitators’ toolkits so that they are prepared to address resistance due to experience. The question of who supports these issues, which might be labor union-related, is also one that should be addressed.

Additionally, while the SI facilitators and principals discussed the composition of inquiry teams based on content area, SLC and other factors, should there be considerations made based on the experience levels of the members? For Ms. Godfrey, having both veteran and novice teachers posed an extra challenge for her facilitation. She summarized, “It was kind of hard to merge the two worlds.” Further research would explore how to respond to such resistance and also how to compose Strategic Inquiry teams so that balance is achieved on many fronts and facilitators can move team members to the sphere of success as they seek to better serve their students. Resistance is inevitable, but preemptive responses in terms of facilitator moves or team structure may be warranted as viable additions to the SI model and similar school improvement programs based on what these facilitators shared.

An example of a response structure that might have seemed useful for facilitators struggling with resistant team members is the district-level coach. The deployment of the coach in this model of Strategic Inquiry was a missed opportunity. Coaches were meant to aid facilitators at their school sites during the weeks between the monthly train-the-trainer meetings. Well-equipped coaches would have been able to help the schools sustain the work while the SI trainers were on the hiatus due to contract issues, served as
a thought partner to determine who from the school was ready to serve as a Strategic Inquiry facilitator or even navigated issues of teacher resistance with facilitators. Incongruence in preparation, deployment and clarity of roles were factors that impeded coaches from playing the aforementioned roles and opens the door to explore how best to use district coaches dedicated to Strategic Inquiry.

For District Coaches: Role, Skills, Deployment

The Strategic Inquiry facilitators attended training sessions once per month as a part of the Renewal program. In the interim weeks between the training sessions, to support the facilitators, the district hired coaches that were deployed to each school. Throughout the interviews, facilitators spoke openly about the challenges that they faced in implementing SI at their schools and the tactics that they employed in response. An implication for further research would be how best to utilize coaches to provide targeted day-to-day support to facilitators in lieu of waiting for the next training session to troubleshoot problems of practice. The use of coaches in this current model was ambiguous and the understanding of their role differed by interviewee.

From the district level, the stated intent of the coaches was to be trained in the Strategic Inquiry model so that they could be this additional support for facilitators and their schools during implementation. Ms. Walker explained, “We had content coaches who were being trained simultaneously. In fact, they were often a few steps ahead of where teachers and teacher leaders were.” The assertion here is that though the coaches received the same training at the same time as the facilitators, they were actually more
accelerated than the school-based trainees. Similarly, Mr. Christophers shares his perspective of the coach training: “The coaches were all trained alongside the teachers—at least in the original cohort, which is what you’re calling cohort 2014, so there was regular training of the teacher leaders and the coaches alongside one another.” The difference in Mr. Christophers’ description is that he doesn’t make the claim that the coaches were ahead of the facilitators. Instead, he shares, “I think it was valuable to us. It wasn’t perfect, but it was valuable because you ended up with the coaches trained and lead teachers trained.” The imperfection is expressed more during interviews with school-based facilitators and principals as they lamented on the confusion of the coaches’ roles and open the window for the exploration of a structure that puts the coaches in more of a supportive role than what was experienced.

According to Dr. Panero, the design for the train-the-trainer model involved coaches being trained in partnership with school-based facilitators as co-learners and leaders of the work. Additionally, a non-negotiable in the design established up front was that coaches would be assigned to a school enough days to be present for at least one inquiry team’s complete set of meetings during year 1 so that they could fully learn the work experientially. However, because they were hired and allocated as content coaches (in alignment with a different theory of change related to content coaching), this did not happen in practice consistently. Therefore, coaches were not in a position to learn the SI process as deeply as the school based trainers. This accounted in large part for the variation in knowledge and support by the coaches. Some were allocated in this fashion

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to learn the SI work deeply and others were not. Some were directed primarily to support content coaching and others were not.

Primarily, to be effective as a coach, facilitators would need to see the coach as having knowledge or expertise in the subject area. Although Ms. Walker felt that the coaches were ahead of the facilitators in their Strategic Inquiry acumen, facilitator opinions differed. Mr. Noris explained, “They were, obviously, learners of the inquiry process and really were at the same time learning as I was learning. I really don’t think that the coaches were there yet, in regards of kind of being the experts in inquiry, but they were still learners at the same time.” Facilitators assessed the DOE coaches against their own knowledge of inquiry, and given that the coaches were trained at the same time and along the same pace as the facilitators, Mr. Noris, at least, found that the coaches did not have a knowledge base greater than his. This impedes the receptiveness of the facilitator to the coach’s support.

Juxtaposing the first year of the SI implementation to subsequent years, Mr. Noris saw an increase in coach activity in the final two years. He credits this with “a big push for inquiry” that he felt occurred after the first year. He said, “I can obviously see a lot of those coaches now taking on that leadership role of facilitating inquiry, coaching facilitators on leading inquiry.” Compared to the previous years, he reiterated, “I was at trainer-the-trainer events, a lot of the coaches from Renewal School were learners as the process was going on.” Mr. Noris couldn’t explain the reason for the change that he noticed. That is further evidence of the lack of clarity about the role of the coaches in
supporting Strategic Inquiry implementation. Additionally, his conversation about the coaches positioned him as if he were observing their practices, but he never spoke about him actually interacting with coaches, which shows the level of support he received from them.

Further research might explore differentiation with regard to coach support. The deploying of coaches can provide further guidance, but there may be a strategic method of deciding which facilitators could benefit from coach support and around what areas specifically. Ms. Humble had recollections of coaches coming to East HS, but she could not actually identify who the coaches were working with and why. She explained, “They came to schools, but none of them worked with the ELLs. Or they might have worked with the teachers of ELLs, but not in my capacity.” Again, another sign of confusion about the role of the coaches. As Ms. Humble was the Assistant Principal who managed ELL instruction, she offered that the coaches did visit the school, but she did not interact with them likely because they did not work with the ELL population.

If the coaching support was designed to buttress Strategic Inquiry facilitators’ implementation of SI in the schools, additional studies should be conducted to identify the degree to which this was approached and via which actors. When asked if the coaches played a role in her development as an SI facilitator, Ms. Godfrey replied, “No, they did not specifically. It was more like on a school-wide level. They would observe teachers and then give feedback to administration, and then administration would tell us what needed to be done.” These check-ins yielded guidance for school leaders in order to
turnkey to the SI facilitators, but Ms. Godfrey did not have the benefit of working
directly with the coaches. There is more to be learned about the structure of the coaching
support, the focus of the school visits and how the observed teachers were selected.

For special education teachers, Ms. Donaldson shared that a coach from the
district came to support. This was for the teachers, but not for Ms. Donaldson as the SI
facilitator. She explained, “I didn’t really have a coach. I had [Ms. X] who was
there as sort of a special education coach. She really was supportive in the work as far as
identifying needs of teachers and within the classroom instruction. As far as Strategic
Inquiry, I don’t really think that that was a capacity that served me from renewal.” Again,
a district coach provided support with viewing teaching and learning from the inside the
classroom, but Ms. Donaldson did not find the coach’s support to be useful in the
implementation of Strategic Inquiry.

Similarly, Ms. Johnson had the experience of seeing coaches work with teachers
in the SLC that she leads. What she describes is not a coordinated effort in which the
coaches work alongside inquiry teams to help with the implementation of academic
interventions. Instead, she offers, “I do know that there are some coaches in ELA and
also in the global I believe and I do see them in and they’re helping a lot more in terms of
the WIT strategies, and I see a few of them on a weekly basis in the hallways passing
from teacher to teacher.” Ms. Johnson’s observation shows that she is unsure of the role
of the coaches. Additionally, the support that the district coaches are providing to the
teachers in Ms. Johnson’s SLC are not aligned to the work of the inquiry teams given that
Ms. Johnson, as the SI facilitator, does not interact with the coach and just seems him/her moving from room to room.

Lessons in deciding the proper coaching model for Strategic Inquiry facilitators (and their teams) are necessary so that the most supportive decisions are made. Given that East HS started implementing SI years before the district sponsored training in the model as a school improvement strategy, some facilitators had more years of training than the district coaches. That posed a conflict with the coaching support that the district was offering. Mr. Meadows explained, “The issue here was that because we had started the WIT work and the inquiry work separately and combined a couple of years before Renewal introduced it, so we were much further ahead.” Districts implementing Strategic Inquiry would benefit from support in designing differentiated coaching models for schools based on their maturity in SI. Mr. Meadows also noted:

And we gave a certain amount of pushback to the type of support we were receiving because it was not meeting our needs. It was bringing us backwards. So they kind of let us progress at our own pace and, like Jennifer said, they give us a light-touch.

The result of that pushback was all facilitators reporting that they had no support, interaction or collaboration with the district coaches. The facilitators saw the coaches as passersbys in the hallway who supported teachers and sometimes reported to the school leadership team on what they observed. Ms. Walker from the district office found the coaches to be developmentally ahead of the facilitators, but Mr. Meadows argued that at
his school, the facilitators were ahead of the coaches. The program should offer guidance on a coaching model that provides an accurate assessment and aligned coach support.

At North HS, Ms. England had a different coaching experience. She described having a coach in the first year who would come in and give her feedback on her facilitation of Strategic Inquiry. However, that level of support went away without any understanding of why. Ms. England explained the new dynamic, “It was more like I would have a check in once a week on where my teams are as opposed to him supporting my team or my other teams. He would just say, ‘Where are you in the process, do you need anything?’ That kind of thing.” Shifts in coaching structures should be explored in order to understand the rationale. Also, a communication protocol would help facilitators understand the strategy and implications for how they were to conduct their work.

There was evidence that school-based staff felt that they could reject the coach support. Ms. England described her understanding of the original intention: “The ORS coaches were to come to the schools twice a week or once a week depending on need.” There was no evidence of a system to assess the Strategic Inquiry coaching needs of the schools in a transparent way that was shared with the facilitators. Ms. England concluded, “We didn’t need that support. We had their support in other areas but not around the inquiry work.” North HS did not start Strategic Inquiry before the district sponsored the implementation. Therefore, the grounds by which Ms. England dismissed the coaching support should be explored to understand how school setting can be a driver for designing coach interventions.
The absence of coordination between the coach and the inquiry team became a point of contention for Ms. Nolan. She shared an instance in which the coach came to visit the school and observed classrooms “without having discussed with the teachers first what they were looking for or why they were there or who they were.” To remedy, Ms. Nolan discussed having to push the reset button in her SI team to “pause the work and re-establish trust within the community, and re-introduce who the coach is.” Ms. Nolan having to repair the cultural shock provided by the coach’s intrusive visit cites an example of a district coach as an impediment to the progress of an inquiry team.

Ultimately, Ms. Nolan spoke to the coach one-on-one and explained to her the importance of “having conversations with the staff, establishing trust, having them understand your role, and really kind of setting the focus together and realigning to trust.”

The ways in which coaches are developed outside of learning the Strategic Inquiry model alongside the facilitators should be explored. Such a study would offer suggestions of other competencies necessary to be an effective coach of facilitators in the Strategic Inquiry model.

Anecdotally, in juxtaposition to that experience in the second year, Ms. Nolan heard positive stories about coaches who were working with other teams:

I think in the third year, I know that there were coaches from Renewal schools that were working very closely with how Strategic Inquiry was working for particular departments, and that I have heard good feedback from.

Though Ms. Nolan’s personal experience was not completely positive with the district coaches, other colleagues gave good reviews of coaches who supported in the
implementation of Strategic Inquiry at the school. Facilitators who found coach support to be beneficial should have the opportunity to share their experiences and reflect on the elements that drove that positive relationship.

In the same school, the reactions to the coaches were disparate and unpredictable. Ms. Smith found that the coaches did not “offer any valuable insight.” Further, she shared,

They didn’t seem very knowledgeable of Strategic Inquiry. They could not support the teachers to create tasks that were successful within a unified unit or curriculum. I felt like they were more a part of my team to be trained than my support staff that I could go to for next steps.

Ms. Smith’s perception of the acumen of the coaches is in contrast with the district leader’s assessment of the coaches being ahead of the facilitators in their knowledge of Strategic Inquiry. Such a sharp rebuke of the coaches should be unpacked to identify where facilitators saw gaps in coaches and what would have been helpful support for these facilitators.

As principal, Ms. Tristan played a part in training inquiry team leaders based on previous training she had on team facilitation. Her perspective was that the district coaches were not needed at North HS and their role was “mostly informational.” She explained that it was “because the training that was received from the initial core team is what drove the work.” Though the coaches were also trained in Strategic Inquiry, Ms. Tristan felt that she could rely on the SI facilitators solely to lead the work without coach support. She further explained the structure and frequency of inquiry team meetings and
the support teachers were getting from their leaders and concluded, “The resources of coaches did not need to be extended here in that area.” This is another example of a school leader advocating that the coaches were not necessary because of the state of Strategic Inquiry at the school level. Districts would benefit from a research-based decision making map to assess what scaffolding live at the school and if the school truly does not need the support of a coach. In both East HS and North HS, the principal dismissed the district coaches based on their own assessments of the effectiveness and usefulness of the coaches and not driven by any schema that found their internal supports to be adequate to buttress the leadership and learning of Strategic Inquiry facilitators.

Ms. Thornhill shared positive collaborations with the district coach. She said that coaches were prevalent in her school and she noticed from facilitators in other schools that that was not the case elsewhere. In her rationalization, “I just knew that we were always a school that was always flagged in low performing and I figured that’s why they pumped so much money into us, I mean we are a Renewal school.” She credits her coach with helping her to understand and improve her skill in making tennis charts to track student progress toward skill mastery. She shared, “I really have to say the time I spent with the coaches more, was probably the most helpful.” The coaches helped her to design her inquiry sessions and create learning plans for teachers who were developing skills.

The training that the coaches received in inquiry was beneficial to Ms. Thornhill’s growth. She explained, “The biggest take away for me was getting to collaborate with people who were already trained in what we needed to do.” Her coach visited her two or
three times a week to check in on the progress of the inquiry teams and assist in the planning of steps to move teachers forward. One particular coach she found to be “really, really helpful in helping to push what we were trying to do and to give us ideas on how to move students forward and then.” It is important to understand the dynamic that Ms. Thornhill had with her coaches and the experiences that made it fruitful. The decisions behind matching Ms. Thornhill with her coaches might be lessons for establishing positive coach-facilitator relationships in the Strategic Inquiry model.

In facilitating Strategic Inquiry, Mr. Blast did not find the district coach support to be helpful. He explained, “I had just as much training as them in inquiry. We were all learning along the same path. The same speed, and the same class. I guess that’s the answer, that they really were supporting strategy understanding, as opposed to inquiry and facilitator moves.” The notion that the coaches were ahead of the facilitators did not match the perception and experience of Mr. Blast. As seen with other facilitators, that led to them dismissing the coaches and delegitimizing their roles. Mr. Blast found coaches to be more district staff who focused on big picture “strategy” as opposed to aiding in his development as a leader of teachers in an inquiry team.

However, with regard to implementing the writing work at his school, Mr. Blast did find utility in the coaches. He shared, “I felt that their contribution to my growth was more structural in the writing strategies, as opposed to the actual inquiry process.” Further exploration into the background of this particular coach and how their grasp of the writing work seemed stronger to Mr. Blast than their skills in inquiry work is
warranted. Assessments of coach skills revealed where their strengths were and how they could be of support. Implementing the writing work alongside inquiry was a common challenge of the facilitators. Therefore, it would be insightful to vet if the coaches also struggled to become well-versed in both.

The principal at West HS, like his peers, articulated a view that because of where his school was developmentally, he advocated for a customized district coach support structure. He explained that the school matured to the point at which it could “foster growth and build capacity within the building.” With that rationale, he said that the district “worked with [them] to see…the best way to implement the strategy [t]here and collaborated with [them] to do so.” Again, a differentiated approach to implementing coaching at a school based on an assessment of what is happening in the ground with the growth of the Strategic Inquiry model by the facilitators and school leaders.

The role of the district coach in the strategic model was ambiguous and capricious. Various facilitators reported different levels of utility in the coaches and experiences that ran the spectrum of helpful and stymying. Principals shared that they used their positional power to lobby the district to allow a customized approach to district coach support. Additional research into how coaches were used would respond to these key points that arose as pivotal in understanding how to leverage coaches in a way that would be beneficial to the growth of schools, the SI facilitators and teachers as they implement the Strategic Inquiry model:

- What is the role of the coach?
• How should the district message and clarify the role of the coaches for schools?
• In what ways can the developmental needs of schools be identified?
• How is it determined that assigning a coach is the effective intervention?
• How can the district use a needs assessments to match coaches with schools (or create strong matches between coaches and specific facilitators)?
• Other than a knowledge of Strategic Inquiry and the writing strategies, what competencies do coaches need that can help them to build trust with school teams as an outsider coming in to support a struggling school?

The potential for coaches to provide real-time, on-site support for Strategic Inquiry facilitators was pivotal. Facilitators reported legitimate struggles in learning and implementing the model. Therefore, designing a study that answers the above questions has the ability to create a framework for selecting, hiring, preparing and deploying coaches to support Strategic Inquiry facilitators in their schools. With the goal of moving student achievement, the work of the Strategic Inquiry teams were consequential. The supports for the teams and their facilitators were crucial to advancing toward the goal of improved student outcomes. Although this study was a focus on facilitators and their perspectives as they implemented the model, the next section makes the case for a necessary effects study to vet if Strategic Inquiry, alongside the elements of training and support, actually had an impact on student achievement.
For Researchers: Impact on Student Outcomes

The purpose of this study is to report the experiences of school-based facilitators being trained in the implementation of the Strategic Inquiry model of school improvement. This is not a study to assess if the work of facilitators in the Strategic Inquiry model had an impact on moving student achievement in their schools. Nevertheless, interviewees expressed multiple anecdotal examples of student performance improving as a result of the initiative’s efforts. This section describes some of the gains that interviewees attribute to the Strategic Inquiry model. There is an implication for further research to assess if there is a correlation between the activities of the Strategic Inquiry facilitators and any improved accountability metrics for their respective schools.

At East HS, Mr. Noris discussed students who were repeatedly unsuccessful in exams until his inquiry team began analyzing their skill gaps and implementing instructional interventions:

In my personal class I had close to 80% passing of the Global History Regents, which is one of the hardest things to pass. Inquiry with students that had failed the Regents seven, eight times, attempted and failed, and I had about 80% passing, tracking their data, and moving the students to the sphere of success.

Mr. Noris’ inquiry team had representatives from multiple different content areas: English, math and social studies. Additionally, a special education teacher was on the team. He credits their collaboration and expertise with finding strategies that worked to
move students to the “sphere of success,” having the skills needed to increase their performance and a better chance at excelling at assessments.

Similarly, Ms. Johnson at East HS cited the Strategic Inquiry practices as the reason that previously unsuccessful students are passing the algebra regents. She shared, “I’ve seen most of it in math just because that’s where my focus is, but I have students again who have struggled with passing the algebra exam multiple times. They’ve taken it 10 times.” The target of Ms. Johnson’s team’s inquiry were students who repeatedly failed the exam and were consistently within points of passing the exam. Ms. Johnson led her team in isolating the skills necessary to cross the passing hurdle and reteaching those skills in new ways for these students. Per her reports, “And they’re getting it now, and they’re getting the 65’s, and the 70’s and the 75’s, so it’s making an impact.”

The facilitators sensed that the Strategic Inquiry strategies leveled the playing field for students. In serving special populations, Ms. Donaldson found that the inquiry team practices of finding exactly where students are getting stuck has worked to move performance for special education students under her purview. She expressed,

We have students that are reading below first grade, first grade reading levels, and we’re asking them in three years, they have to take this regents. They are not alternate assessment students. It really has been the equalizer and the access provider for my students.

Note that these are high school students reading at early literacy levels. Ms. Donaldson believes that SI helped to accelerate their growth. For students with disabilities, she said,
I have an improvement in graduation rate for students with disabilities. My graduation rate for my students with disabilities is the same if not higher than students that are general education students, and that’s within four years.

These claims of advancement for students with disabilities warrant further investigation to explore quantitatively Ms. Donaldson’s claim that her facilitation of Strategic Inquiry ushered in an “equalizer” for students receiving special education supports. East HS has a special education population of 16%. Therefore, with this finding that SI practices support the growth of students with disabilities, that would justify expansion and diffusion to other teachers – phase III of Strategic Inquiry.

Ms. Johnson talked extensively about the deliberate nature of the Strategic Inquiry processes and how they serve, for her and her team, as a guide for every instructional move. Her belief is that students are improving because teachers are now looking at data continuously to inform their pedagogical next steps:

It’s made huge results. Teachers are using it in everything to justify every move that they make. In department meetings we are talking about monthly assessment results, we’re talking about formative assessments, every day we’re incorporating some kind of formative assessment in our classes to make moves right then and there or make moves for the next day.

Another element Ms. Johnson added that she feels accelerates the growth is not just teachers and inquiry team members identifying student skill gaps, but also bringing students into the conversation. She shared, “It’s everywhere and it’s to the point now that the kids know the skills that they need to work on just as well as the teachers do.” She found that having students know their individual areas of growth, the interventions being
attempted and the trajectory made students partners in the inquiry and further accelerated performance improvements.

At North HS, facilitators reported that implementation of Strategic Inquiry had positive impacts on students’ reading comprehension and writing. Ms. Nolan was impressed with students’ breakdown of a complex text and the use of the WITsi strategies to understand the goal of a comprehension question and evidence to support responses. She spoke about “marginalia,” which she described as jotting that students put in the margins to show them asking themselves questions about the text and making inferences to support conclusions Ms. Nolan explained,

For a long reading passage, let’s say from ELA common core, I might see the five questions attached to or the 10 questions attached to that reading marked up. Then I would see in the margins of the actual reading passage where the questions are, the key question words, I would see things underlined with the identification of who, what, when, like question words.

The writing strategies that SI facilitators taught to their team members, according to Ms. Nolan, manifested themselves on students’ assessments as they digested reading comprehension questions on an exam. Ms. Nolan then said that if a student got the question wrong, she would be able to follow their annotations and therefore their trains of thought to redirect the student for future exam questions.

That was an anecdotal example of North HS student growth in reading comprehension from SI facilitators’ strategies taught to their teams. Ms. Smith shared that she thought the WITsi strategies were helping to improve students’ writing products.
She credits this, from her estimation, with the work that was done in the inquiry teams related to writing. She explained,

From building our data from the last two years, we’ve seen impact. We can see tremendous growth with our target populations from baseline to final writing assessment. You can clearly see how the students structured their writings based on the strategies that were implemented interdisciplinary within our team.

Her method of coming to this conclusion was students’ baseline assessment (taken before SI interventions) and the final writing assessment (administered after the SI interventions). Ms. Smith described a process of putting “the pieces side by side, so you could put the baseline to the final piece next to each other and you can see the growth.” Not scientific, but that is the evidence that Ms. Smith and her team uses to validate their efforts and claim that the work of the SI facilitators is making an impact on teacher practice and ultimately student performance.

Similar to Ms. Donaldson at East HS, Ms. Nolan at North HS also discussed her observations of how the Strategic Inquiry practices impacted students in special populations, specifically English Language Learners. For students learning English, Ms. Nolan saw evidence of annotation on their assessments where the students were using WIT strategies, which includes “a paraphrase that explains in the student’s thinking what they are writing.” Additionally, students were making an outline or plan before writing. The biggest gain in writing structure per Ms. Nolan’s estimation was, “For ELL, depending on how far along they are in their language acquisition and how well they speak and read and write academically in their first language, I might see words in a
different language translated.” Ms. Nolan described this as a key development in a student’s language learning as they approach the writing task using a connection of WITsi strategies and their language acquisition strategies.

Ms. Nolan also described SI as a game changer that should be credited with the improvements in regents exam scores that she cites. She explains, “The growth for the student population that I work with, for the English language learners, I would not have seen the growth in their regent scores if we had not been explicitly teaching writing and reading skills, and if we had not been emphasizing them in a meaningful, explicit way.” This echoes the sentiment of Ms. Donaldson that SI is an “equalizer” and has put students with special learning needs on equal footing with general education students. Finally, as a result of the improvements that Ms. Nolan has observed from the implementation of SI at her school, she concluded, “I think if we’re not explicitly and systemically teaching writing and reading skills, we’re not actually preparing our students for success after high school.” Another implication for further research emerges here regarding the connection between implementing SI in a high school and the impact on college and career readiness for students.

At West HS, much of the same sentiment was shared by the facilitators that the work with Strategic Inquiry was the reason for improvements in student performance. Their evidence went from general anecdotes to specific examples of quantifiable increases in achievement data that they have seen and they attribute to the SI work. In the former, Mr. Harry shared, “We see a lot of growth in students’ productivity, students’
understanding of different skills that we’re working on across grades and across disciplines.” Here is another example of an assertion of the value in sharing student skill gaps with the students as the pedagogical interventions are being applied. Mr. Blast remarked that a teacher on his inquiry team approached him to share, “These kids are writing a lot better than they were five years ago.” These are intangible examples worth exploring to ascertain if SI can truly be credited with these anecdotal reports of improvement.

In the category of quantifiable student data, Ms. Thornhill shared that the SI approach to writing was beneficial for students who were still who “really don’t have a grasp on writing and it’s difficult for them.” Her experience guided her to believe that SI had the ability to impact low level secondary school writers because the “step by step process” could be included in daily lessons seamlessly and merge well with the content that the teacher addresses. As a specific example, Ms. Thornhill shared, “I had a student who couldn’t write a complete sentence, she ended up passing a regents exam with a 70 on the first try, and she hardly spoke English.” For this student, Ms. Thornhill believed that the cognitive, methodical approach to writing promoted by WITsi was a key determinant in providing the skills need to pass the English exam.

While these are individual observations of student growth from facilitators of the Strategic Inquiry model, this opens the door for an evaluation that can test the degree to which SI impacts student performance. The study being conducted by Teachers College has as a question: How does SI, with a train-the-trainer model, impact student outcomes
in 9th, 10th, and 11th grades? This study highlights lessons from the implementation of SI in struggling large urban high schools. However, much of the evidence cited by facilitators discussed the role that SI strategies played in moving students in special populations, English Language Learners and those with disabilities. Ms. Donaldson called SI an “equalizer” because of the way in which she has seen special education students perform on par with general education students as a result of academic interventions born from SI. Further exploration should be done to investigate the scientific veracity of these claims, which is important because special education students are often hardest to serve, and if SI proves to be a successful intervention, all educators would benefit as they aim to meet the diverse learning needs of all students.

Finally, multiple interviewees talked about the success that they have observed when they brought the target population students into the inquiry process. They reported that such transparency allowed students to be on board with their growth and work as partners with their teachers. Mr. Meadows, principal at East HS described the process as follows:

We bring them into the inquiry process because one of the things that they receive in each of their inquiry classes at the start of the unit is a list of skills and vocabulary and content points that they’re going to be learning.

In the same way that inquiry teams track student growth and mastery of skills, the students were invited to do the same. While the inquiry team uses tennis charts as their data tracker, the student process was similar but more student-friendly. Mr. Meadows noted,
Periodically, the teacher will give it to them, they’ll refer to it, and they’ll indicate what kind of progress they feel that they’re making towards learning those things...we ask them to present evidence.

Again, the value of bringing students into the inquiry process comes from the interviewees’ anecdotes, but a next step in the research would be to design a study to vet the impact of transparency in skill gaps and learning targets with students. The findings will reveal whether students grew more if they were aware of their individual learning goals and the interventions that teachers were putting in place to ameliorate.

Documenting conditions for this study would also be necessary as a consideration for those who might wish to replicate in different settings. In their 2012 study, Talbert et al. (2012) found that the version of Strategic Inquiry implemented at that time fostered a stronger collaboration between teachers and students. The new question erected from these recent findings now asks for a continuation of Talbert et al.’s work to ask how to leverage that collaboration and vet if the process of sharing learning targets with students will have a positive (or accelerated) impact on improving student achievement.

**Conclusion**

The goal of every educator is to move the needle on student academic performance. Therefore, it is natural to read a report of this kind and look for hints of student achievement growth as a result of the implementation of a school improvement model. This study focused on the facilitators and their self-reported experiences in training and implementation of Strategic Inquiry. Embedded in those self-reports, not surprisingly, were examples of how it was perceived that student outcomes were
positively impacted by these efforts. There is evidence that SI in prior iterations improved outcomes for students (Panero & Talbert, 2013). However, it is important to be guided by the refrain that the existing anecdotal reports of impact in the more recent train-the-trainer model of SI are nonscientific observations. The time has come to move from anecdotal claims to a search for evidence-based findings related to the effectiveness of the Strategic Inquiry model in improving outcomes for students in NYC’s renewal high schools. Both the Findings and Discussion sections are filled with data from the interviews to serve as guides for researchers to have the knowledge to build on this study to further explore any of the elements discussed. Each section of Chapter 5 leaves open-ended suggestions and questions that may serve as the basis for later research, should another student or practitioner wish to explore this study in different contexts, school districts, school improvement programs, etc.

Like the Strategic Inquiry model of school improvement, this report is now in Phase III, in which the findings about facilitator experiences are being spread to others, so that they might learn as they engage in similar processes. The challenges and reported triumphs serve as lessons for adopters while the evidence provides necessary context. The goal is for adopters to read thoroughly before considering implementation factors in their locales. Another goal is for other researchers to read about the experiences of the facilitators and be encouraged to take the baton and design a complementary study that places student achievement as the focus. This added knowledge would allow readers—
schools, districts, educators and reformers—to understand the interplay between training facilitators to lead Strategic Inquiry and the evidence-based effects on student learning.
APPENDICES

Appendix A: List of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPT</td>
<td>Common planning time</td>
</tr>
<tr>
<td>LIT</td>
<td>Low-inference transcript</td>
</tr>
<tr>
<td>PCT</td>
<td>Peer Collaborative Teacher</td>
</tr>
<tr>
<td>PD</td>
<td>Professional development</td>
</tr>
<tr>
<td>SAM</td>
<td>Scaffolded Apprenticeship Model</td>
</tr>
<tr>
<td>SI</td>
<td>Strategic Inquiry</td>
</tr>
<tr>
<td>SLC</td>
<td>Small learning community</td>
</tr>
<tr>
<td>SQR</td>
<td>School Quality Review</td>
</tr>
<tr>
<td>WIT</td>
<td>Writing is Thinking</td>
</tr>
<tr>
<td>WITsi</td>
<td>Writing is Thinking through Strategic Inquiry</td>
</tr>
</tbody>
</table>

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Appendix B: Full Conceptual Framework

<table>
<thead>
<tr>
<th>Problem Statement</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>The experiences of school-based staff implementing the Strategic Inquiry model of school turnaround have not been chronicled to identify their backgrounds, training and support structures within their schools.</td>
<td>To increase the education field's understanding of the role of facilitators in the Strategic Inquiry model of school improvement and also facilitators' perceptions of how best to support and sustain their work.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Outputs</th>
<th>Short-term outcomes</th>
<th>Long-term outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human resources</td>
<td>Development of materials for train-the-trainer sessions by SI trainers</td>
<td>SI training materials that are iterative and align to the needs of the renewal schools and their facilitators</td>
<td>School-based facilitators will be trained in SI as measured by their reporting of skill development as a result of attending the trainings</td>
<td>Training will be turnkeyed and more teachers trained as facilitators as measured by number of facilitators in each school not trained by SI</td>
</tr>
<tr>
<td>- Office of Renewal Schools coaches</td>
<td>Attendance of monthly train-the-trainer sessions by facilitators</td>
<td># of train-the-trainer sessions held throughout the three-year period</td>
<td>Common planning time will shift to focus on SI strategies as measured by facilitator interviews</td>
<td>School culture will shift to a more collaborative environment as measured by the SQR rating</td>
</tr>
<tr>
<td>- Renewal school principals</td>
<td>Leading of school-based inquiry team meetings by facilitators</td>
<td># of periods per week each school dedicated to SI team meetings</td>
<td>SI facilitators will reference train-the-trainer materials to support their school-based inquiry teams as they train other teachers in the implementation of the model as measured by facilitator reports of the use of SI resources</td>
<td>School leaders will share leadership with teachers as measured by facilitator and principal interviews</td>
</tr>
<tr>
<td>- School-based facilitators</td>
<td>Inquiry teams visits to other teams implementing SI</td>
<td>Frequency of visits conducted by school teams to other schools/teams conducting SI</td>
<td>Financial resources appropriately allocated to sustain the implementation of SI through the three-year period</td>
<td>Members of inquiry teams will begin to use common language around student learning needs and how to improve teacher practice to respond as measured by facilitator interviews</td>
</tr>
<tr>
<td>- Strategic inquiry trainers</td>
<td>Coaching provided by ORS team</td>
<td>Sufficient human resources made available to support the implementation of SI in each renewal school</td>
<td>School leadership provided sufficient time and structures for SI teams to collaborate</td>
<td></td>
</tr>
<tr>
<td>- Teachers as members of inquiry teams</td>
<td>Adoption of technology to share files and best practices throughout the school and across inquiry teams</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rationales</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Utilizing a facilitator-led three-phase process of inquiry allows teacher teams to identify student learning needs, plan for improvement and spread best practices to other colleagues (Scharff et al., 2010; Talbert et al., 2012; Panero and Talbert, 2013)</td>
<td></td>
</tr>
<tr>
<td>- Reform efforts take hold when teachers take ownership of their own learning by identifying their areas of instructional deficiency and seeking out opportunities to learn (Lieberman, 1995)</td>
<td></td>
</tr>
<tr>
<td>- Teachers working together within a defined structure can actually improve student outcomes in a school (Louis et al., 2010)</td>
<td></td>
</tr>
<tr>
<td>- Shift from professional development to train-the-trainer is a shift from personal responsibility for learnings to an understanding of collective responsibility for school-wide improvement (Pearce et al., 2012; Stewart, 2014)</td>
<td></td>
</tr>
<tr>
<td>- Train-the-trainer model is dependent on pedagogues shifting from being a learner of best practices to considering how they might teach other colleagues to improve their practice as well (Stewart, 2014)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assumptions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- The success of SI experienced at other schools, such as New Dorp, can be replicated in other NYC high schools</td>
<td></td>
</tr>
<tr>
<td>- District and renewal schools will use this model as the key lever for change and position it as priority above other initiatives in the schools</td>
<td></td>
</tr>
<tr>
<td>- District and renewal schools will provide necessary resources to support and sustain school-based facilitators as they lead SI</td>
<td></td>
</tr>
<tr>
<td>- Facilitators have the political buy-in of their school leaders, teachers and other key staff as they implement SI strategies</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix C: Participating Schools (2016-17 Data)

<table>
<thead>
<tr>
<th>Data Component</th>
<th>East HS</th>
<th>North HS</th>
<th>West HS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students served</td>
<td>2,200</td>
<td>2,100</td>
<td>1,800</td>
</tr>
<tr>
<td>Student demographics</td>
<td>Asian: 34%</td>
<td>Black: 22%</td>
<td>Hispanic: 35%</td>
</tr>
<tr>
<td></td>
<td>Asian: 16%</td>
<td>Black: 12%</td>
<td>Hispanic: 63%</td>
</tr>
<tr>
<td></td>
<td>Asian: 33%</td>
<td>Black: 11%</td>
<td>Hispanic: 48%</td>
</tr>
<tr>
<td>Principal exp. at this school (years)</td>
<td>5</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>% of teachers with 3+ years of experience</td>
<td>60%</td>
<td>81%</td>
<td>77%</td>
</tr>
<tr>
<td>4-year graduation rate</td>
<td>71%</td>
<td>66%</td>
<td>69%</td>
</tr>
<tr>
<td>Rigorous Instruction</td>
<td>Meeting Target</td>
<td>Approaching Target</td>
<td>Meeting Target</td>
</tr>
<tr>
<td>Collaborative Teachers</td>
<td>Meeting Target</td>
<td>Meeting Target</td>
<td>Meeting Target</td>
</tr>
<tr>
<td>Supportive Environment</td>
<td>Meeting Target</td>
<td>Approaching Target</td>
<td>Meeting Target</td>
</tr>
<tr>
<td>Effective School Leadership</td>
<td>Meeting Target</td>
<td>Meeting Target</td>
<td>Meeting Target</td>
</tr>
<tr>
<td>Strong Family-Community Ties</td>
<td>Approaching Target</td>
<td>Not Meeting Target</td>
<td>Approaching Target</td>
</tr>
<tr>
<td>Trust</td>
<td>Meeting Target</td>
<td>Approaching Target</td>
<td>Meeting Target</td>
</tr>
<tr>
<td># of years implementing SI</td>
<td>5</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>
# Appendix D: Interviewees and Their Roles

<table>
<thead>
<tr>
<th>Name</th>
<th>Subject Type</th>
<th>School/Organization</th>
<th>Interviewee’s role at their school/organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Panero</td>
<td>SI Trainer</td>
<td>Strategic Inquiry</td>
<td>Designer/Trainer</td>
</tr>
<tr>
<td>Mr. Blast</td>
<td>Facilitator</td>
<td>West HS</td>
<td>Peer Collaborative Teacher</td>
</tr>
<tr>
<td>Mr. Christophers</td>
<td>DOE Staff</td>
<td>NYCDOE</td>
<td>Director</td>
</tr>
<tr>
<td>Mr. Harry</td>
<td>Facilitator</td>
<td>West HS</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Mr. Jamson</td>
<td>Facilitator</td>
<td>East HS</td>
<td>SLC Director</td>
</tr>
<tr>
<td>Mr. Khan</td>
<td>Principal</td>
<td>West HS</td>
<td>Principal</td>
</tr>
<tr>
<td>Mr. Meadows</td>
<td>Principal</td>
<td>East HS</td>
<td>Principal</td>
</tr>
<tr>
<td>Mr. Noris</td>
<td>Facilitator</td>
<td>East HS</td>
<td>SLC Director</td>
</tr>
<tr>
<td>Ms. Donaldson</td>
<td>Facilitator</td>
<td>East HS</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Ms. England</td>
<td>Facilitator</td>
<td>North HS</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Ms. Godfrey</td>
<td>Facilitator</td>
<td>East HS</td>
<td>SLC Director</td>
</tr>
<tr>
<td>Ms. Hirata</td>
<td>SI Trainer</td>
<td>Strategic Inquiry</td>
<td>Designer/Trainer</td>
</tr>
<tr>
<td>Ms. Humble</td>
<td>Facilitator</td>
<td>East HS</td>
<td>Assistant Principal</td>
</tr>
<tr>
<td>Ms. Nolan</td>
<td>Facilitator</td>
<td>North HS</td>
<td>Peer Collaborative Teacher</td>
</tr>
<tr>
<td>Ms. Smith</td>
<td>Facilitator</td>
<td>North HS</td>
<td>Peer Collaborative Teacher</td>
</tr>
<tr>
<td>Ms. Thornhill</td>
<td>Facilitator</td>
<td>West HS</td>
<td>Peer Collaborative Teacher</td>
</tr>
<tr>
<td>Ms. Tristan</td>
<td>Principal</td>
<td>North HS</td>
<td>Principal</td>
</tr>
<tr>
<td>Ms. Johnson</td>
<td>Facilitator</td>
<td>East HS</td>
<td>SLC Director</td>
</tr>
<tr>
<td>Ms. Walker</td>
<td>DOE Staff</td>
<td>NYCDOE</td>
<td>Director</td>
</tr>
</tbody>
</table>
### Appendix E: Multiple Levels of Inquiry

<table>
<thead>
<tr>
<th>Inquiry team members</th>
<th>Target population</th>
<th>Sample goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>SI trainers</td>
<td>SI facilitators</td>
<td>Determine next steps for the learning of the facilitators</td>
</tr>
<tr>
<td>District staff</td>
<td>School leaders</td>
<td>Design effective professional development for meetings with school leaders</td>
</tr>
<tr>
<td>District staff and school leadership teams</td>
<td>Teachers</td>
<td>Move the practice of teachers</td>
</tr>
<tr>
<td>School leadership teams and SI facilitators</td>
<td>Teachers</td>
<td>Vet the real-time progress teams are making toward academic improvement goals</td>
</tr>
<tr>
<td>SI facilitators</td>
<td>Teachers</td>
<td>Identify how best to support teachers in professional development next steps</td>
</tr>
<tr>
<td>Teachers</td>
<td>Students</td>
<td>Improve student attendance</td>
</tr>
</tbody>
</table>
## Appendix F: Coding Scheme and Illustrative Data

<table>
<thead>
<tr>
<th>Macro Codes</th>
<th>Micro Codes (Selected Examples)</th>
<th>Data from Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distributed leadership</td>
<td>Other inquiry team members</td>
<td>I think one of the common factors is that release of authority to teacher leaders where teacher leaders have an evidence based approach and they bring that evidence to the leader and they have good rationale to why they make a certain decision based on the processes they learned. I think the thing that I haven’t mentioned yet that I think is pretty significant is training the teacher leaders how to support the other adults around them to learn and become leaders too. We also have teachers who become so amazing at it that we have them as leads. We literally let them lead CPT meetings because they’re so good at what they’re doing and we want more teachers to get to that point where they could lead too and show off their skills and show off how inquiry is helping them and how the skills are helping their classrooms.</td>
</tr>
<tr>
<td>Facilitator/SI resources</td>
<td>District staff</td>
<td>So, for example in the morning, when I’d get to a school I’d have a strategic meeting with coaches talking about their plan for the day and how they were going to support teams so that some of my time was spent with the coaches and then some of time was spent with the leader either doing walkthroughs or doing planning about their expectations or planning PD to support the whole school implementing the writing strategies.</td>
</tr>
<tr>
<td>Macro Codes</td>
<td>Micro Codes (Selected Examples)</td>
<td>Data from Interviews</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Districts coaches</td>
<td>They came to schools, but none of them worked with the Ls. Or they might have worked the teachers of ELLs, but not in my capacity.</td>
<td>Personally, I felt that the ORS coaches were being trained through the process. I don’t feel they offered any valuable insight as far as training teachers and teams or leaders. They didn’t seem very knowledgeable of what strategic inquiry as per now. They could not support the teachers to create tasks that were successful within a unified unit or curriculum. I felt like they were more a part of my team to be trained than my support staff that I could go to for next steps.</td>
</tr>
<tr>
<td>Principals</td>
<td>First, the principal is a very big advocate for the inquiry work. It starts from him, and it trickles down to the APs, and the APs now have the responsibility of ensuring that this inquiry process is being used in all classrooms and making sure that the right people are leading the inquiry process, so that everyone can understand and be part of the inquiry process.</td>
<td></td>
</tr>
<tr>
<td>SI trainers</td>
<td>A very active role, they were extremely supportive, provided us with feedback throughout the entire three years, we could easily drop them an email, they had a response with us with so many reflections and guided next steps. They did many inter-visitations at our school, they came see what we were doing and helped us grow throughout the process. They were very active.</td>
<td></td>
</tr>
<tr>
<td>Macro Codes</td>
<td>Micro Codes (Selected Examples)</td>
<td>Data from Interviews</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Inter-visitations</td>
<td>Inter (outside)</td>
<td>We had visits, twice, which I think there’s nothing better for our own school. It was a very positive experience where we had assistant principals from other schools come in and observe our inquiry teams in action and also visit classrooms. We got a lot of very positive feedback and, of course, more feedback for next steps.</td>
</tr>
<tr>
<td>Intra (inside)</td>
<td></td>
<td>We did some inter-visitations of our own inquiry. Each peer collaborative teacher and assistant principal observed the other people’s common planning time inquiry meeting and we did low inference transcripts of each other. That was hard to share that but I felt it was grounded in practices people had done for observations and things like that but we’d never done it for inquiry. That was very helpful, I think in people seeing, “My team struggles like your team struggles,” or, “I like other team does this at their meetings. We never tried it that way.” For them to be able to see that was very powerful.</td>
</tr>
<tr>
<td>Leading SI</td>
<td>Challenges of leading SI</td>
<td>Pushback from teachers. Teachers who did not know what strategic inquiry was and hence did not believe in it or did not see how this would be beneficial to our students. I will be honest with you, a lot of teachers, one of the first things they tell us is this is a monumental waste of their time. But you know, because we, for lack of a better word, heavily encouraged them to implement this in their classrooms on a weekly basis, eventually, towards the end of the year, they come back and they’d say, “Oh, I see. I see what you were trying to do.”</td>
</tr>
<tr>
<td>Macro Codes</td>
<td>Micro Codes (Selected Examples)</td>
<td>Data from Interviews</td>
</tr>
<tr>
<td>--------------</td>
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<tr>
<td>Strategies for leading SI</td>
<td>Honestly, the most important thing is to really have the support of a long term investment. If you don’t have the support of the long term, I don’t see how it will stick. Teachers and administrators really have to set aside their fears of, “This is just one more thing that some educator has created and is making a lot of money from.” It’s a process that takes time. You have to allow it to develop, and learn it from the ground up. You can’t just jump to the end and expect results. You really have to build from the bottom, but also push to advance the learning as fast as you can.</td>
<td></td>
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<tr>
<td>School improvement</td>
<td>School culture shifts</td>
<td>Culture doesn’t shift overnight. It’s ongoing, and obviously, it’s reinforced from the principals, administrators. It wasn’t just “Hey, let’s try this,” no. It was “This is what we’re doing,” and they actually followed through with it throughout the year. Administrators give feedback, we check data, we saw students’ success, and we kept going from there. Obviously, as a culture, it takes time, and you just have to kind of always reward success and just keep going with that momentum.</td>
</tr>
<tr>
<td>Student data/outcome shifts</td>
<td>They’ve incorporated WIT into all the content areas, it’s helping the students to write better, it’s helping the students to communicate themselves better, I think it’s something that between inquiry and WIT it’s something that we’ll never get rid of at the school because of the results that we’ve seen, we’ve seen huge results in the students’ writing, we’ve seen huge results in their academics, it’s to powerful to get rid of.</td>
<td></td>
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<tr>
<td>Macro Codes</td>
<td>Micro Codes (Selected Examples)</td>
<td>Data from Interviews</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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<tr>
<td>Time dedicated to</td>
<td>Frequency</td>
<td>And the ELLs as always have a difficult time passing the English Regents. And we worked on the inquiry process to see like really what was their struggle and through that inquiry we saw that they had problems with the multiple choice questions and we were able to begin that inquiry process that had a large percentage of students pass that year so we were able to see the benefits of the inquiry we had done.</td>
</tr>
<tr>
<td>inquiry work</td>
<td></td>
<td>We have department meetings three times a week, every other week, and we have small learning community meetings, common planning time meetings, twice a week, every other week. Every week, we meet on the department on one day, and every other week, the two days is a trade-off. Inquiry is done during common planning times, department, and common planning times for small learning communities.</td>
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<td>We now have four peer collaborative teachers at our school. Our school is about ... I think we have about 2,800 students. We have four peer collaborative teachers, and each peer collaborative teacher leads a meeting four days a week in which we perform our Inquiry duties, and many other, I guess, initiatives that have come down. So we have a pretty sacred amount of time each week dedicated. Four days a week is a lot of time.</td>
</tr>
<tr>
<td>Structure</td>
<td></td>
<td>And the teachers are collaborating within the department, so if you have your target students, you’ll bring the work from those target students to the meeting and everybody in your group will do that, in your inquiry group, and you’ll be</td>
</tr>
<tr>
<td>Macro Codes (Selected Examples)</td>
<td>Data from Interviews</td>
<td></td>
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<td>--------------------------------</td>
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<td></td>
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<tr>
<td>able to look at student work together, making sure that we’re all looking at the same thing. You know, there’s always like a check for understanding even on the inquiry level. So they have agenda every day. A majority of the time it’s focused on tennis charting student work, so both times that I’ve had, I’ve had CPTs the last 2 years, my groups were so big I had to divide them into 2. Each group had a lead, usually a common ELA teacher that everyone shared and it would be a minimum of 3 different content areas with each team, we would pick 10 students that we all shared. We would decide as a team based on the baseline that we had done in the earlier school year, which skill we wanted to focus on.</td>
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Appendix G: Interview Protocols

Facilitator Interview Protocol

BACKGROUND

1. What is your role at your school and how long have you served in this position?

2. How were you selected to be the Strategic Inquiry facilitator at your school?

3. To you, what is the significance of you serving as an SI facilitator for your school?

4. To what extent have you been exposed to inquiry work prior to SI?
   a. The Scaffolded Apprenticeship Model (SAM) represents a method for implementing SI in schools. How would you compare SI to SAM? To your other inquiry experience?

STRATEGIC INQUIRY TRAINING

5. Who else, if anyone, from your school attends the SI train-the-trainer sessions? What are their positions in the school?

6. Can you describe the SI training process? What does a typical Friday train-the-trainer session look/feel like?
   a. Describe your training experience in year 1.
   b. Describe your training experience in year 2. (if applicable)

7. In what ways, if at all, have the training developed your abilities to: (THE
FOUR GOALS OF SI

a. Push the learning of the adults on your inquiry team(s)?

b. Present evidence-based information clearly?

c. Use collaboration effectively?

d. Lead change?

8. What skills learned in the train-the-trainer sessions have been most useful to you in leading SI at your school? Least useful?

a. How could the training sessions be changed to help you be more successful?

9. What challenges have you faced in learning to lead a Strategic Inquiry team?

a. What are strategies you’ve used in overcoming those challenges?

b. Can you explain a specific instance where you experienced this challenge and what you did in that moment?

10. What role do the SI consultants play in your SI experience?

11. What role do the ORS coaches play in your SI experience?

12. Describe the way(s) in which you interact with teams from other schools that are also being trained at SI.

13. How would you compare the expectations of SI with other “professional development” workshop series that you have attended?

FOSTERING A CULTURE OF INQUIRY AT THE SCHOOL
14. What part do you see SI playing in the renewal process at your school?
   a. Is SI a priority at your school? Why or why not?

15. What systems and/or structures do you have at your school to support the SI work?
   a. Do teachers have common planning time dedicated to SI?

16. At your school, how much time is dedicated to SI per week, including teacher planning time and instructional time?
   a. What takes place during meeting time dedicated to SI?
   b. Outside of your regular meetings, how often do you informally discuss your inquiry work with members of your inquiry team?

WIT-SPECIFIC QUESTIONS

17. What part do you see WIT playing in the renewal process at your school?
   Is the writing work a priority at your school? Why or why not?

18. Is this initiative making a difference in your school?
   a. Can you give an example of changes you are seeing?
      i. Probe for use of data, WIT strategies, moving bottom third

19. What are the challenges you have faced in leading teachers’ implementation of WIT strategies? (WIT focus)
   a. What has helped to overcome these challenges?
   b. Probe to identify where/how they learned the technique(s) to overcome the reported strategies.
Principal Interview Protocol

BACKGROUND

1. First, can you tell us about your background? How long have you been principal of this school?
   a. When did your school begin to implement SI/WIT?

2. Why was your school chosen to implement SI/WIT?
   a. How do you think SI compares to the inquiry work started in the district over a decade ago? How does it compare to the Chancellor’s new focus on cycles of learning?
   b. How do you think WIT compares to previous writing and literacy initiatives? How does it compare to other literacy/writing work promoted by the Chancellor?

3. To what extent have you been involved with inquiry work prior to SI?
   a. The Scaffolded Apprenticeship Model (SAM) represents a method for implementing SI in schools. How would you compare SI to SAM? To your other inquiry experience?

LEADERSHIP OF STRATEGIC INQUIRY

4. How have you been involved in the SI and/or WIT process at your school?

5. How have you developed your own understanding of SI and WIT?
   a. Have you received training in SI and WIT?

6. Let’s talk now about the inquiry team facilitators at your school. How
many do you have?

a. How was it decided who would lead teams?

7. How would you describe your relationship with inquiry team facilitators at your school?

a. Do you meet regularly to discuss SI/WIT and/or work through challenges?

b. What kinds of authority do they have? What types of decisions do they make? [PROBE: What type of decisions might require your approval?] 

c. Are there other systems and structures in place at your school that support the development of inquiry team facilitators?

8. What is your vision for developing teacher leadership at your school? How do SI and/or WIT fit into that vision?

a. How do you address gaps in leadership of SI due to teacher turnover?

9. What is the role of the coaches from the Office of School Renewal?

a. How does the role of the ORS coaches differ from that of the SI consultants?

b. How does the role of the ORS coaches differ from that of the inquiry team facilitators?

10. How would you describe your relationship with the ORS coaches who facilitate SI and/or WIT at your school? [PROBE: How often and in what
capacity do you work together?]  

a. Who has decision-making authority when it comes to SI/WIT?

11. How would you evaluate the usefulness of the ORS coaches at your school? What factors contribute to your evaluation?

BUILDING CAPACITY FOR IMPROVEMENT

12. What systems and/or structures do you have at your school to support SI and/or WIT work?

13. At your school, how much time is dedicated to SI and/or WIT per week, including teacher planning time and instructional time? What takes place during meeting time dedicated to SI and/or WIT?

a. How do you learn about the work of teacher teams?

b. Is there a routine they use to update you on their progress? How do you hold teacher teams accountable?

14. What proportion of your teachers of each grade participate in SI and/or WIT?

a. What were the criteria used for deciding which teachers or teams would participate in SI/WIT?

b. To what extent do you feel the teacher teams’ inquiry work carries over into their classrooms? [PROBE: Why or why not? In what ways? Can you give an example?]

15. Are there any support staff (e.g. guidance counselors, psychologists, etc.)
on inquiry teams? [IF YES: What was the rationale for including these staff on inquiry teams?]

16. What kinds of resources are available to support teacher teams’ data use?
   a. Does your school have a data specialist? [IF YES: Does this specialist support SI work? How? What kind of data is supplied via the specialist role in regard to the SI process?]

17. What do you think has worked well with the implementation of SI and/or WIT at your school? What have been some of the challenges? [PROBE: How have you dealt with these challenges?]

FOSTERING A CULTURE OF INQUIRY

18. Do you feel your teachers have strong buy-in to the SI and/or WIT process? What efforts do you think helped develop this buy-in?

19. Do you feel there is a sense of trust and open communication between teachers and administration? [PROBE: How did you help develop that? How has SI played a role in fostering trust? Are there other [initiatives/school practices/district mandates] that might enhance or undermine the school’s ability to build trust?]

VIEW OF STRATEGIC INQUIRY

20. What part do you see SI and/or WIT playing in the renewal process at your school? Is SI and/or WIT a priority at your school? Why or why not?

21. The renewal process involves many different initiatives and types of
support. How do you integrate these strands of work into your SI and/or WIT work?

a. Are there areas of alignment between SI/WIT and some of these other initiatives (e.g., EngageNY or another district-selected curriculum)?

b. Areas of conflict?

c. Which do you find to be most effective in turning failing schools around?

22. How do you message and communicate about SI/WIT to your teachers and staff?

23. How would you describe the reaction of your teachers to SI and/or WIT? Has there been excitement about the work?

   a. What about resistance? [PROBE: How do you respond to resistance to SI and/or WIT? Do you think that teachers' attitudes toward SI/WIT have changed over time?]

SHARED ACCOUNTABILITY

24. Have you noticed changes in school culture as a result of SI and/or WIT? [PROBE: Changes in the way teachers collaborate? Changes in the way teachers think about student learning? Data use? Norm of public learning?]

25. Since SI and/or WIT work began at your school, have you noticed a shift in the extent to which teachers feel responsible for student achievement?
a. Changes in the way teachers talk about students?

b. About their control over student achievement?

c. About students’ capacity for learning/improvement?

d. Changes in feelings of responsibility for children whom they don’t teach directly (i.e., other students at their grade level, all students in the school)?

EVIDENCE-BASED PRACTICE

26. Have you implemented any school-wide, systematic changes in response to teacher team learning related to SI and/or WIT? [PROBE: Instructional changes? Curricular changes? Changes in agenda for teacher professional development? Operational changes? What have been the results of those changes?]

27. Does your school engage in other forms of inquiry outside of classroom instruction (e.g., attendance inquiry, cabinet-level inquiry)? If so, what has that experience been like?

28. Do you communicate with other schools implementing SI and/or WIT? Do you have opportunities to share evidence of effectiveness or work through challenges?

WRAP-UP

29. Is there anything else you would like to share about your school’s implementation of SI and/or WIT?
Strategic Inquiry Trainers Interview Protocol

ROLES & RESPONSIBILITIES

1. First, can you tell us about your background? How did you come to be a consultant for Strategic Inquiry (SI)?
   a. How did you prepare for training ORS (Office of Renewal Schools) coaches and inquiry team facilitators?
   b. How have you learned what is needed to support the work in the train-the-trainer model as a cohort leader?

2. What do you find most challenging about your role as a cohort leader?
   a. What has been most challenging about learning the work? About developing the capacities of the other consultants?
   b. What has been most helpful for you in overcoming these challenges?
   c. To what extent do you find your Professional Learning Days to be valuable for developing your capacities as a cohort leader?

3. Within the train-the-trainer model, what is the intended role of the following groups:
   a. SI consultants?
   b. ORS central office staff?
   c. ORS coaches?
   d. School principals?
e. Inquiry team facilitators?

4. How would you describe the relationship between the SI consultants and the ORS central office staff?
   a. What factors have shaped this relationship?
   b. How supportive of the work is ORS central office?

5. In what ways have the organization and reorganization of the ORS office impacted implementation of the train-the-trainer model?
   a. How has staff turnover in the ORS office impacted your work?
   b. How have contract issues affected your work?

6. How have SI consultants worked to develop understanding and buy-in for SI/WIT among the ORS central office staff?
   a. How have you worked to challenge practices and habits that may inhibit inquiry practice?
   b. Have you encountered resistance? If so, how have you addressed the resistance?
   c. How have you worked to help ORS central office staff develop their own inquiry practice at the district level?

TRAIN-THE-TRAINER MODEL

7. How has the train-the-trainer model evolved over the past three years?
   What is the rationale behind these changes?
   a. In what ways does the training differ from the SAM-certification
program?

8. To what extent does the facilitation of Cohorts 2014 and 2015 differ?
   a. Number of train-the-trainer sessions?
   b. Capacity of SI Consultants to lead effective facilitator development?
   c. Curriculum used?

9. To what extent are the train-the-trainer sessions differentiated for the following groups:
   a. ORS coaches and inquiry team facilitators?
   b. Train-the-trainer participants in different phases of their inquiry learning?
   c. Cohort 2014 and Cohort 2015?

10. How do SI consultants support participants outside of train-the-trainer sessions?
    a. How often do you visit inquiry team facilitators at their schools?
    b. What systems and structures do you use for creating and sharing tools and resources for inquiry work?

11. How do you ensure facilitator training is an authentic learning experience through a train-the-trainer model?

12. What systems and structures have you established for evaluating the effectiveness of SI/WIT and the train-the-trainer model?
a. Receiving and acting on feedback from train-the-trainer participants?

13. What are your overall impressions of how the train-the-trainer model is working?
   a. What is working well?
   b. What could be improved? What resources and supports would be necessary to make these improvements?
   c. Do you see it as a sustainable model for the implementation of SI?

14. What is the rationale behind the SI consultants’ Professional Learning Days? What kinds of activities or learning takes place on these days? How is the agenda determined?

THEORY OF ACTION

15. Can you describe the relationship between SI and WIT?
   a. How consistent is understanding of this relationship among ORS central office staff, ORS coaches, facilitators, and inquiry team members?
   b. IF DIFFERENCES MENTIONED: What accounts for differences in understanding? To what extent do you think differences in understanding impact the work?

16. How do you understand SI/WIT’s role in improving outcomes at the Renewal High Schools?
   a. Are schools using SI/WIT as their primary reform strategy? How
and why does that vary among schools?

b. Do you see SI as a tool being used to develop coherence among initiatives for school reform? Are there conflicts?

17. What role do the SI consultants have, if any, in providing support directly to schools?

   a. To what extent do SI consultants have a relationship with school principals?

   b. IF APPLICABLE: How do these direct relationships with schools affect the SI/WIT work?

18. How do you identify and tap potential leaders of SI/WIT at schools? How are they trained and supported to take leadership positions in SI/WIT?

WRAP-UP

19. Is there anything else related to being an SI consultant that I didn’t ask you about but should have?
DOE Staff Interview Protocol

BACKGROUND

1. First, tell me about your background. How did you come to be in your current position? How long have you been in this position?

2. Can you tell us about your role and responsibilities?
   a. With respect to SI and/or WIT?
   b. How many schools do you support in the implementation of SI/WIT?

3. To what extent have you been involved in inquiry work in schools prior to SI/WIT? Have you worked with the Scaffolded Apprenticeship Model (SAM)?
   a. If so, how would you compare SI to SAM? To your other inquiry experience?

4. As you look across a week, how much time do you typically spend on SI/WIT? How much of that time is spent in the field at schools (days/week)?
   a. In the field, how much of your time is spent with inquiry teams?
   How much time do you spend supporting teachers who do not work on inquiry teams?

FACILITATION OF SI/WIT

5. How do you prioritize your support for SI/WIT implementation and your
other responsibilities?

a. Do you find that SI/WIT conflicts or integrates well with other initiatives (i.e., EngageNY or Common Core) that you support?

b. How do you navigate conflicts between these competing priorities?

6. How much time (periods per week) do you typically spend coaching teachers on:

   a. SI/inquiry?
   
   b. WIT?
   
   c. Content and/or content area pedagogy?
   
   d. Other? Can you please explain?

7. How does your support for teachers on inquiry teams differ from your support for teachers who are not on inquiry teams?

8. What is your role in supporting the inquiry teams with SI/WIT? [PROBE: How often and in what capacity do you generally work with them?]

   a. Facilitating inquiry team meetings?
   
   b. Fostering deep understanding of the core principles of SI?
   
   c. Diagnosing skill gaps and setting learning targets?
   
   d. Teaching of WIT strategies?
   
   e. Giving feedback?
   
   f. Designing assessments?
   
   g. Developing data collection tools?
h. Low inference transcripts (LITs)?

9. How would you describe your relationship with inquiry team facilitators at the school(s)? [PROBE: How often and in what capacity do you work together?]

   a. Do you have meeting times outside of inquiry team facilitation where you discuss and/or work through challenges related to SI/WIT? Are these meetings mostly formal or informal?

   b. How do you develop the capacity of inquiry team facilitators to lead SI/WIT implementation at their school? In which areas have they needed the most support?

      a. To what extent do you differentiate the support you give to them?

      b. What factors contribute to a successful relationship with inquiry team facilitators?

10. Are there formal structures for finding out and responding to what different schools need in regard to their implementation of SI/WIT?

      a. What types of differences in needs across schools have you noticed? What do you think are the reasons for those differences?

      b. To what extent do you differentiate the support you give to schools for SI/WIT implementation?

CHALLENGES AND SUCCESSES IN IMPLEMENTATION OF SI/WIT

11. What have been some of the biggest challenges in facilitating the
implementation of SI/WIT in schools? The biggest successes?

a. In navigating school context?

b. In developing the inquiry practice of inquiry teams?

c. In addressing and shifting norms, beliefs, and policies that inhibit inquiry?

12. What resources and/or support structures are available to you when you encounter a challenge in the facilitation of SI/WIT? [PROBE: Which are most helpful to you?]

13. How would you describe your relationship with the inquiry teams and their facilitators?

a. What factors contribute to what you believe to be a successful/challenging relationship?

b. What strategies do you use to:

   i. Keep teams and/or the facilitator on task?

   ii. Foster a positive, trusting team dynamic?

   iii. Encourage intellectual risk-taking?

   iv. Promote teacher collaboration?

   v. Push teachers’ thinking about SI?

   vi. Build teachers’ leadership skills?

   vii. Nurture shared responsibility for student success?

14. How would you describe your relationship(s) with the school principal(s)?
a. What factors contribute to what you believe to be a successful/challenging relationship with the principal?

b. Are there structures in place that help foster or maintain these relationships?

c. Do you co-plan with the principal and inquiry team facilitators to spread inquiry and/or WIT strategically across teachers in the school?

VIEW OF STRATEGIC INQUIRY

15. How do you develop buy-in and understanding of SI at the school?

   a. Have you encountered resistance to SI/WIT at the schools? How have you addressed this resistance?

16. Do you believe SI/WIT is an effective strategy for improving student learning and performance? Why or why not?

17. Have you observed changes in the culture of the schools you support?

   a. Changes in teacher leadership and decision making?

   b. Changes in shared accountability among teachers and staff?

   c. Changes in the norms of public learning?

   d. Changes in evidence-based practice?

RESOURCES & SUPPORT

18. Which SI train-the-trainer cohort are you in?

19. To what extent has your training has prepared you to lead and/or support the implementation of SI/WIT in schools? [PROBE: Push the learning of
the adults on your inquiry team? Present evidence-based information clearly? Use collaboration effectively? Lead change?

a. What has been most effective for your own learning?

b. What more do you need or have you needed?

20. Do you feel that you have a strong understanding of the underlying core principles of SI? What has contributed to this understanding (or lack of it)?

a. Do you feel you know what you need to know to support WIT?

What has contributed to this understanding (or lack of it)?

21. How does the central office set expectations for your role?

a. What are you expected to prioritize in your coaching of teachers?

b. Overall, does the messaging around your priorities feel synergistic or conflicting with what schools expect? With what SI Consulting expects?

22. To what extent does the central office support you in your implementation of SI/WIT?

a. Are there structures in place to support your work with SI/WIT?

b. Are there areas in which central office support could be better?

23. How would you describe your relationship to Strategic Inquiry Consulting? How does Strategic Inquiry Consulting support you in implementing SI/WIT?

WRAP-UP
24. Is there anything related to your role in the implementation of SI/WIT that I didn’t ask you about but should have?
Appendix H: Informed Consent

Please complete this form after you have read the research invitation note and/or listened to an explanation about the research.

Project Title: The Strategic Inquiry Model of School Turnaround: Lessons in Training, Developing and Supporting School-Based Facilitators

Researcher: Carl-Anthony Watson, MPA

Thank you for your interest in taking part in this research. Before you agree to take part, a member of the research team must explain the project to you.

If you have any questions arising from the explanation already given to you, please ask the researcher before you to decide whether to join in.

Participant’s Statement

I agree that:

- I have read the notes written herein and understand what the study involves.
- I understand that my participation will be audio recorded and I consent to use of this material as part of the project.
- I understand that Teacher’s College, Columbia University is conducting a broader study of Strategic Inquiry and this data will be used in that project as well. I will complete a separate consent form for the use of this data in that study.
• I understand that if I decide at any time that I no longer wish to take part in this project, I can notify the researchers involved and withdraw immediately.

• I understand that such information will be treated as strictly confidential and handled in accordance with the provisions of the Data Protection Act 1998.

• I understand that the information I have submitted will be published as a report. Confidentiality and anonymity will be maintained and it will not be possible to identify me from any publications.

• I understand that if I have any questions or concerns about this research, I can contact: Carl-Anthony Watson at 347.885.8982 or cawatson@gse.upenn.edu. I may also contact the faculty member supervising this work: Rand Quinn, Assistant Professor at 215.898.9330 or raq@gse.upenn.edu.

• I agree that the research project named above has been explained to me to my satisfaction and I agree to take part in this study.

Name: ________________________________

Signature: ______________________________ Date: ________________________________
References


