



CHAPTER 1

Determine Purpose

At Curtis High School, Lori was about to lead her first workshop on Socratic Seminars, a student-centered approach to discussion. She was a newer teacher at the site, and this was her first time presenting to all the staff.

Before the session began, the school's principal, Dr. Deal, addressed staff in the dimly lit school library. "I know I normally lead professional development," she said, "but Lori Cohen is going to lead our session today. She came to my office last week after the College Success Conference and was *very* enthusiastic about this new method called Socratic Seminars. So I decided to let her share her learning with you." Before Dr. Deal could introduce Lori, a longtime math teacher, Dan, raised his hand.

"Isn't Lori an English teacher? What's the purpose of learning about this?"

"Yes, she teaches English, but she thinks Socratic Seminars might help any teacher. You can figure out how to adapt it." Dan looked at his math colleagues, one of whom shrugged. Marcus, the PE teacher, smirked and called across the library to Dan. "What do you care, Dan? You're retiring this year. I don't know what this has to do with PE, but I have to be here."

Trying to ignore the comments, Lori placed bowls of chocolate-covered pretzels and stacks of learning packets on each table. Dr. Deal continued, "Let's just see how this goes."

"At least we get snacks," Dan said. Laughter flickered across the room.

Undeterred, Lori flipped on the overhead projector, smiled, and shared an inspirational quote from one of her students who had recently participated in a Socratic Seminar. She didn't make explicit connections to other disciplines, but she talked about Socratic Seminars as a form of discussion that could be adapted to suit teachers' needs. Dr. Deal sat in the back of the library, filling out a grant application. She left halfway through the session, her walkie-talkie blaring a garbled message as she rushed out.

As Lori asked for volunteers for a mock demonstration, Dan raised his hand again. "Yeah, um, Lori, you seem really nice, and it's clear you put time into this presentation. I'm still hoping you can explain how this is relevant for over half the teachers in this room. It's midterms, and I have a lot of grading to do before the reporting period ends." Some teachers nodded their heads. Lori was silent, not sure how to respond.

Eileen, a respected history teacher and Lori's former mentor, interrupted. "Dan, I hear you. Those of us who have been here a long time have sat through a lot of PD that's had nothing to do with us. That's not Lori's fault." Dan nodded, but he was also thinking, *this too shall pass*.

Six volunteers (Eileen and Marcus included) participated in a brief Socratic Seminar. Dan ignored the demonstration and graded the stack of math quizzes he'd brought with him. Dr. Deal stepped back into the room with five minutes left in the session.

In the final minute, Dr. Deal thanked Lori for sharing her learning, and half the room clapped. Some teachers grabbed a final handful of pretzels and left their packets on the tables. A few told Lori, "Good job." Dan approached Dr. Deal on his way out of the room. "Lori did a nice job, but that PD served no purpose for me."

Dismantling PD Apathy

Recall a PD session you recently attended and reflect on the following questions:

- What was the session's purpose?
- How did the agenda and activities meet the PD's purpose?
- How did the facilitator make the learning matter for participants?
- What was the impact of the PD in relation to the purpose?

Getting Clear on Purpose

When the purpose of PD is clear, participants are more willing and eager to engage in learning and transformation becomes possible. When the purpose is not clear,

participants become cynical and “this too shall pass” becomes the mantra. PD becomes a thing to endure, not something that helps people develop skills and knowledge.

In this book we ask, what if PD could be more like a party? What if PD could be a gathering for learning and growth? PD needs to be the primary vehicle through which adults acquire the tools, skills, strategies, and knowledge to ensure every child gets what they need every day to thrive. But if PD is thought of as an endurance test, it won’t fulfill that potential. Our thoughts become our reality: To create a new mental model about PD, we must start by getting clear on purpose. Purpose is a key component of making more intentional systemic change, and it’s the first step in transforming your PD.

This chapter offers a process for determining purpose. You’ll begin by getting clear about the purpose of your PD and how that purpose might serve you beyond a single PD session. You will then explore how to use that purpose to develop outcomes and possible activities for your PD. You will learn how to make the learning matter by communicating purpose before, during, and after your PD. And you will receive guidance on how to assess the impact of your PD using multiple measures.

Throughout this chapter we’re going to revisit the opening story, beginning with the moment when Lori walks into Dr. Deal’s office, enthusiastic about leading PD on Socratic Seminars. We’re going to imagine this story takes an alternate path, one where Dr. Deal says, “Lori, I love your enthusiasm. I think this is a great idea. But before we move forward and you present to staff, let’s identify the *why* for this session. Let’s make sure this PD can change teachers’ practices and have an empowering impact on students.” As we follow Lori and Dr. Deal’s process, we’ll see what might be possible for them—and you—when purpose drives PD.

Purpose: The Foundation for Transformational Learning

To get clear on purpose, we first ask *why*—not just once, but throughout the planning process. When the purpose is clear, everything flows from there—the planning process is more meaningful, and the time spent in the PD matters to participants more. When participants are clear on the purpose, they are more willing to learn and transfer that learning to their contexts.

Five Whys to Purpose

One structure that supports this clarity is an exercise called the Five Whys to Purpose, adapted from National School Reform Faculty. The Five Whys to Purpose helps you consider what's at the core of your PD. In systems thinking, this process is called *root-cause analysis*. This kind of analysis helps leaders and teams consider the root causes of systemic issues so they can respond strategically. The Five Whys to Purpose exercise guides you to articulate why your PD really matters. Here's how the exercise works:

1. Think of an upcoming PD session you're leading. Identify what you think the purpose for this session is and why this needs to be the purpose. Write down an initial purpose statement. Then answer the question "why?" underneath your purpose statement.
2. Complete this process four more times. Just let the ideas come without forcing your response. Doing this five times allows you to dig below the surface to uncover additional, and potentially deeper, purposes.
3. After the fifth *why*, review your responses and write your final purpose statement. You might find that your original purpose has changed and something more pressing has emerged. Or you might find that your *why* connects to something larger. A PD on Socratic Seminars, for example, may turn out to be less about a discussion protocol and more about student empowerment.

When participants in Bright Morning's *Artful Design and Facilitation* completed this exercise and shared their final purpose statements, many communicated amazement at where this exercise took them. One participant, Rosario, wanted to lead a PD on equity-focused conversations. Her initial purpose was "to provide tools for teachers to talk about sensitive topics." As she completed the exercise, she uncovered that the purpose was less about the tools themselves (though the tools are important) and more about "ensuring that our students feel seen and cared for so they can be affirmed at school." By the end of the quick exercise, most participants had jotted down purposes that spoke to larger systemic issues at their sites. Identifying these deeper purposes opened up more possibilities—and even imperatives—for educators to address in their PD.

The Five Whys in Practice

In the hypothetical scenario in which Lori and Dr. Deal work together to prepare for a PD around Socratic Seminars, Dr. Deal hands Lori a copy of the Five Whys exercise. After about 10 minutes, Lori produces the responses in Table 1.1.

Table 1.1 Sample Five Whys to Purpose—Socratic Seminars

What's the purpose of PD in Socratic Seminars?
To provide participants with a strong tool for student-centered discussions.

Why?
Because a lot of class discussions tend to be teacher-directed. Students come to rely on a teacher's wisdom rather than their own or their peers'. Also, Socratic Seminars invite dialogue over debate; in a Socratic Seminar students can consider their ideas and find their voices. They build courage to speak, they listen to one another carefully, and they select evidence that best supports their assertions as they build shared meaning.

Why?
Because right now in our classrooms, only some students' voices are privileged—those who talk the most, who are the quickest verbal processors, and often, who are male, white, and English-speaking. Not everyone's voices are heard.

Why?
Because our learning structures in school have been set up to support a narrow subset of students to succeed: Those students usually already have privilege or have assimilated into more privileged structures. This is inequitable at its core.

Why?
Because we haven't considered a different way of engaging our students in classrooms—particularly when power and privilege are the undercurrent of all we do.

Why?
Because we don't want to raise another generation of students who perpetuate an already inequitable status quo.

The purpose of your PD:
To reimagine classroom discussion as an opportunity for shared meaning-making and student empowerment. Class discussion can become a place in which dialogue is welcomed over debate and in which everyone can share their ideas.

Let's pause and consider Lori's final purpose statement for the Socratic Seminar PD:

To reimagine classroom discussion as an opportunity for shared meaning-making and student empowerment. Class discussion can become a place in which dialogue is welcomed over debate and in which everyone can share their ideas.

As you read this purpose statement, what do you imagine could happen in the PD session? What might be some ways to address this purpose?

This purpose statement opens possibilities for where this PD could go, beyond a presentation on Socratic Seminars. With this purpose in mind, Lori and Dr. Deal generate a list of approaches:

- Designing this PD so that all teachers can talk about student-centered discussion (with Socratic Seminars as a case study for one kind of model)
- Focusing on discussion-based classes first (history/social science, English) and perhaps split up the staff into subject-area groups
- Inviting additional teachers to lead PD on discourse structures that empower students and provide more options for teachers across content areas
- Talking about inequities in our classrooms, assessing what's currently happening and considering what we can do to reimagine what's possible

Lori and Dr. Deal choose the first bulleted idea on this list—how to make this PD a place where all teachers can talk about student-centered discussion—and decide to design PD based on that topic.

The Five Whys exercise isn't something you'll share with participants. It's something you (and your collaborative partners) do to create your own clarity. Doing an activity like the Five Whys can also catalyze conversation about systems-level change and the pathways to get there—and perhaps inspire possibilities that had not yet been considered.

In our hypothetical scenario, the Five Whys exercise allows Lori and Dr. Deal to get clarity on what the Socratic Seminar PD is ultimately about: shared meaning-making and empowering students. If “real life” Dr. Deal used this exercise at Curtis High School as a starting point for all PD, she and her leadership team might have gotten greater clarity about the purpose of PD; she might have collaborated with PD leaders like Lori and talked about how PD could lead to larger changes at their school site. Teachers might have experienced PD differently—not as a series of disconnected sessions or as a “this too shall pass” endurance test, but as an opportunity to transform teaching and learning to best meet the needs of their students.

While it's crucial to clarify the purpose of your PD session, the purpose is even more powerful when it aligns with your site or organization's mission and overarching PD goals. This kind of alignment allows the PD to feel less like an add-on and more integrated into the fabric of your site's approaches to PD. As you think about the purpose of your PD, align that purpose to your site/organization's mission

and connect your purpose to your larger PD goals as well. Together, this alignment provides you with a clear guide for decision-making, clarifying, and sequencing your learning in ways that can best meet the needs of all those involved—most importantly, your students.

Purpose, Power, and Educational Equity

Determining purpose is a crucial first step in creating transformational PD. It is also important to consider the role of power as it relates to purpose. Who decides the purpose of PD? Who has a say in how purpose is decided? If purpose is decided by one sole PD provider, consider additional ways to get input from stakeholders or invite collaboration in the planning process.

When Lori became her school's Dean of Faculty, she went from being a classroom teacher and coach who collaborated with colleagues on all decision-making to the sole person overseeing all PD. She was excited for this role, but she didn't feel right about doing this work in isolation. As a teacher and coach, Lori knew collaboration and shared expertise yielded stronger outcomes for students, so she decided to bring a collaborative practice into her leadership. Each August, Lori met with senior staff and department leaders to identify the site's needs and the PD arc for the year ahead. They reviewed student experience surveys, student outcome data, and teacher performance data to identify areas to address in PD; they surveyed staff about topics they most wanted to learn about. Together, Lori and school leaders collectively determined the purpose of the year's PD. They created a calendar with topics for each month and shared this calendar with all staff. In collaboration, Lori was sharing her power *with* school stakeholders rather than power *over* (a concept we'll describe in greater detail in Chapter 3).

When Elena was a middle school humanities teacher and was preparing to teach a unit on slavery in the United States, she invited the parents and caretakers of her African American students to a planning meeting. She wanted their input into how this history would be taught to their children. As she developed unit plans, she shared those with this group of caregivers and asked for their feedback.

If you're a site leader, how might you design and lead PD with input from school stakeholders? If you are a sole provider, how might you connect with members of your professional community in this process? A single individual might be able to lead transformational learning; but systems transformation requires more of us to work in community to make changes that best support our students. We don't have to do this work alone.

Create Purposeful Plans

Purpose needs to be infused in everything you do. Once you've identified your purpose, then you're ready (and possibly eager) to map a plan of action: identifying your ideals, assessing your gaps, analyzing data, and understanding learning needs. This plan will allow you to generate meaningful outcomes and learning structures that align purpose with action.

Four Steps for Purposeful Planning: Outcomes, Gaps, Possibilities, Priorities

In our Bright Morning workshops, *The Art of Coaching Teams* and *Artful Design and Facilitation*, participants take their work on purpose and put it into action using the four steps outlined next. By the end of this process, they see how a strong purpose can guide their plans and how this practice offers a meaningful structure for designing and implementing professional development.

Step 1: Generate Ideal Outcomes. Once you identify the core purpose of your PD, it's time to generate some ideal outcomes: what you hope to achieve with your PD. Eventually, you may put these outcomes on your agenda, but at this stage, these outcomes are aspirations—all the things you hope to be true as a result of your PD. The following questions can help you envision your ideals.

As a result of this PD. . .

- What do you want PD recipients to know and do?
- What do you want PD recipients to say and feel?
- What outcomes do you hope to see for students?

Let's consider an example. Leanne, an assistant elementary school principal, designed a workshop for department leaders to give meaningful feedback to their colleagues. Her site had a culture of niceness, where department leaders often shied away from giving critical feedback to teachers to support their growth. After doing classroom observations alongside department chairs, Leanne noticed that department leaders would share critical feedback with her, but not with teachers directly. Leanne wondered if department leaders felt equipped with the tools to offer feedback. When generating ideal outcomes for her workshop, Leanne wanted to department leaders to understand some structures for giving feedback and to know the neuroscience behind feedback. She imagined staff would say things like, "I now have a couple good tools to help me process feedback," "my beliefs about feedback have

changed,” and “feedback is a gift that supports teacher growth and student learning.” She wanted participants to feel prepared for their next feedback conversations. When she imagined these outcomes, she got excited about what was possible.

Step 2: Identify Gaps. After generating ideal outcomes, the next step is to identify gaps between where participants are and where they need to be for students. When we say gaps, we are referring to areas for learning and growth, not deficits. To identify gaps, it’s helpful to consider what the data tells you. If you are an internal PD provider at your site, data sources may be more readily available to you. If you’re an external provider, you may have to consider what data you need to collect. In this step, the following data sources and questions can support you:

- *Student performance data and experience surveys:* What do these data sources tell you about student outcomes?
- *Performance evaluations:* What do performance evaluations indicate in terms of what people need to know and what skills they need to develop?
- *Focus groups, conversations, and informal check-ins:* What have you learned from conversations (formal and informal) that indicates adult and student learning needs?
- *Surveys:* How will you gauge the knowledge or skill PD participants have in relation to this topic? If you’re surveying adults, questions like these can be helpful to ask:
 - What do you already know or do in relation to this topic?
 - What do you hope to learn in relation to this topic?
 - What questions do you have about this topic?
 - What should the PD leaders/committee consider when designing learning around this topic?

After assessing learning needs, you can review outcomes and determine the following areas for growth:

- Participants’ knowledge and skill gaps
- What people are currently saying and feeling about this topic
- What student data tells you

Sometimes the data will reveal that participants have several areas for learning and growth, and you may need to adjust your outcomes to meet the needs of participants. Or you might find you need to develop a sequence of PD sessions to address participants’ gaps.

When Leanne gathered data for her feedback workshop, she reviewed three data sources to identify gaps: performance evaluation data, department leaders' classroom observation notes, and an anonymous survey she sent to department leaders. Performance evaluation data revealed that teaching practices had not changed much after department leaders' observations. Classroom observation notes indicated areas for teacher growth, but Leanne wasn't sure if or how these growth areas were communicated with teachers directly. When Leanne reviewed the anonymous survey results to gauge department leaders' feelings about feedback, she noted how folks' comments ranged from "I don't know how to give feedback well" to "I'm afraid I won't be liked if I'm honest with teachers about their practice. My department might think I'm being mean." Leanne matched these data sources to her ideal outcomes and recognized that she would need to address department leaders' fears and shift their beliefs about giving feedback.

Step 3: Brainstorm Possible Activities. Once you are clear on participants' gaps, brainstorm a list of ideas for how to close the gaps. When brainstorming activities, consider ways to build participants' knowledge and skills and think about the kinds of activities that will allow participants to be empowered in their learning and implementation.

Planning for her feedback workshop, Leanne brainstormed the following possible activities to address participants' gaps:

- Hopes and fears reflection related to giving feedback
- Role-play a feedback conversation with low-stakes scenarios
- Create a feedback action plan
- Group-guided process to shift beliefs about giving feedback

Step 4: Prioritize Topics—considering the why of each topic. When reviewing the list of possible activities, notice what feels most important, relevant, or purposeful for participants. You might then underline or put a star next to the activities that you suspect will have the greatest impact. In this phase of the process, it's also helpful to articulate the purpose of each activity you select, as identifying the *why* will help when you communicate your plan.

For her workshop, Leanne prioritized addressing participants' hopes and fears around feedback; she wanted to normalize the emotions people were experiencing. She also prioritized an exercise to shift beliefs about feedback, because she imagined department leaders were operating with mental models that were getting in the way of giving critical feedback. Mental models are our beliefs, assumptions, and ideas about how things work. In this example, department leaders were operating with the mental model, or belief, that giving critical feedback meant they were mean or

that they might not be liked. But the culture of niceness wasn't serving students, and Leanne hoped that if department leaders could examine their underlying fears and beliefs about giving feedback, they could eventually shift those beliefs and form new ones that supported student learning. Leanne also prioritized practice with low-stakes feedback scenarios so department leaders could see what a shift in beliefs looked like—and ultimately, how feedback could be a tool for growth.

The Four Steps in Practice

Now let's look at how Lori and Dr. Deal might have put these four steps together to create plans for Lori's Socratic Seminar PD. Let's also imagine they had a conversation about data sources, and then they sent a staff survey asking about what discussion methods teachers use in their content areas, how discussions contribute to student learning, how often discussions happen, and what people already know about Socratic Seminars. Table 1.2 illustrates what Lori and Dr. Deal create from this process.

Table 1.2 Socratic Seminar Outcomes, Gaps, Possibilities, Priorities

Current Conditions and Gaps	Possible Activities (*priorities)	Ideal Outcomes
<u>Gaps</u> • Skills: Giving students tools to facilitate their own discussions • How to gradually release students into their own student-led discussions • Cultural competency: Potential cultural competency gaps based on what some teachers say about what students know (deficit thinking)	• *Do a fishbowl of a Socratic Seminar • How to choose high engagement texts • *Determine what discussion looks and sounds like in your subject area • Create a gradual release plan in pairs/teams to determine how to make classroom discussions more student-centered • *Create an action plan of one student-centered discussion method a week; check with an accountability buddy before the next PD session	<u>Know and do</u> • Teachers are able to create structures and conditions for students to lead their own discussions. • Teachers create psychological safety in classrooms that support student empowerment.

(Continued)

Table 1.2 (Continued)

Current Conditions and Gaps	Possible Activities (*priorities)	Ideal Outcomes
<u>What people are saying/feeling about this topic</u> • “I see its importance, and I want to learn ways to make discussions better for all my students.” • “My students can’t do this. They need the language and the tools to do this well.” • “Right now, all the students who participate are more extroverted. How do I do this in a way that allows my quieter students to engage?” • “I have a lot of curriculum to get through. I don’t want this to slow me down.”		<u>Say and feel</u> • “It’s amazing how student-centered discussion methods allow students to find their voices.” • “When I get out of the way, students have so much more to contribute.” • “I feel proud of my students for what they are able to contribute.”
<u>What student data tells us</u> • Extroverts participate in discussions more than introverts. • Students who participate more in discussions are getting more attention from their teachers.		<u>Outcomes for students</u> • Students can grapple with learning independently rather than relying on the teacher all the time. • Students feel proud of their contributions in class. • Students feel psychologically safe so they are readier to take risks.

After Lori and Dr. Deal fill out this document and go through these steps, they have a conversation about what they notice so they can make decisions about which topics and activities Lori might lead in her upcoming PD. Lori notices some deficit thinking (“these students can’t”) in the Current Conditions and Gaps column, but she also sees alignment between what teachers say about extroverts and what the student data reveals: that introverts participate less and that those who do participate in discussion get more attention from their teachers.

Looking at Table 1.2 allows Lori and Dr. Deal to consider a lot of possibilities to make this workshop purposeful: how to address the knowledge, skill, will, capacity, emotional intelligence, and cultural competency teachers have in relation to this topic, how to make the learning matter to participants, and how to create greater engagement. Based on their assessment of data compared to their desired outcomes, Dr. Deal and Lori talk about the specific, high-leverage activities that would best work to address teachers’ gaps. Based on their assessment, Dr. Deal and Lori land on the activities listed next. They generate a brief purpose phrase about each activity to support their decisions:

- *To activate prior knowledge and honor teacher expertise:* Determine what discussion looks and sounds like in your subject area.
- *To model a student-centered discussion strategy:* Do a fishbowl of a Socratic Seminar.
- *To build accountability:* Create an action plan of one student-centered discussion method you might try; check with an accountability buddy before the next PD session (perhaps do some peer observation to gather more data).

When selecting activities, it’s helpful to talk about the purpose of each activity or write mini purpose statements next to each one. It may seem like overdoing it, but returning to the *why* helps all of us—newer and more experienced PD providers—hold ourselves accountable for creating the conditions for transformational change.

Communicate: Make the Learning Matter

Communication is key at all stages of planning and facilitating PD, and we’ll come back to this topic throughout this book. In terms of communicating purpose, it’s beneficial to consider what communication will look and sound like before, during, and after your PD. The following tips can support you in making the learning matter, and they are broken down into three categories: before the PD, during the PD, and after the PD.

Before the PD

Communicate the purpose in advance. Instead of just sharing the next PD topic with participants, consider writing an enticing blurb that articulates the *why*. You might explain what problem you will be solving with this PD. If this PD is a one-off event or if you have a professional learning day, you might consider writing an email that frames this topic for your participants (Chapter 6 offers a sample of what this communication might look like). Generating anticipation in advance may create greater engagement on the part of your participants.

Audre, a middle school principal, was introducing a peer coaching program to empower teachers to support one another. Prior to the first training, Audre made a short video explaining the purpose of peer coaching and the goals of the first PD session; she talked about the impact of coaching on her growth and how coaching offers a set of tools anyone can use regardless of role. This framing language allowed participants to come to the PD with greater curiosity and openness about what lay ahead.

Assess your audience and leverage relationships. It's critical to assess levels of trust in your organization, the role of power, and whose voices and values are centered. If you've been at your site for a while, consider leveraging relationships. Identify a couple of key colleagues, ones who may have influence in the community and share your excitement about the upcoming PD. Perhaps even involve these colleagues in the workshop. If you don't know people well yet (or you're an external provider), identify someone you can ask about the context (the culture and levels of trust), so you know what to expect during the PD.

When Lori led monthly PD seminars at her site, she leveraged her relationships with the instructional coach and with department leaders. She asked them to be partners in generating excitement for upcoming sessions; in their team meetings, department leaders announced upcoming PD sessions shared how the upcoming session connected to departmental goals. As external providers, Bright Morning consultants ask clients about what matters most to participants—what topics, stories, or experiences are most important—so they can connect the purpose of the workshop to what participants value.

Activate your audience's intrinsic motivation. As you design your session, consider the principles of adult learning (Chapter 4) as you activate to your audience's motivations. Are there portions of your PD that might invite participant input or expertise? Consider the problem your PD will solve and how participants might contribute to that solution. Both before and during your PD, consider how to tap into adult strengths, prior knowledge, and their desire to learn as you frame your PD's purpose.

During the PD

Frame the PD at the beginning. Consider sharing the intended outcomes for your PD and why this PD matters, particularly in relation to student outcomes. Even a couple of sentences of framing can be a powerful anchor for your audience. In Bright Morning's *Onward* Book Club, a PD series that meets monthly, presenters begin each session with the intended outcomes and identify how those outcomes support the PD's overarching purpose: to cultivate emotional resilience so educators can thrive. When educators are thriving, they can create conditions for children to learn and thrive.

Communicate purpose through your agenda. The agenda itself can include the purpose in clear, succinct language. You might write it at the top of the agenda or put purpose statements next to each activity. In our Bright Morning workshops, facilitators share a "What-Why-How" agenda, a three-column agenda that articulates topics and activities (What), the purpose of each activity (Why), and how participants will learn (How). (We'll explore this in depth in Chapter 5.) Facilitators also explain why they're using certain learning structures, for example, when they balance some quieter reflection with group discussion to meet the needs of both introverts and extroverts.

Anticipate questions or concerns. Anticipate that someone might ask, "Why are we doing this?" Script possible answers to likely questions in advance so you can be responsive to your audience and be ready for what comes. Participants in Bright Morning's equity workshops sometimes wonder why race-based affinity groups are offered for small-group discussion. Elena and Lori anticipate this question and are prepared to answer with their reasoning: "Participants who identify as Black, Indigenous, People of Color (BIPOC) can decide whether they want to be in a BIPOC breakout group for the session. Racial affinity discussion groups allow for participants to reaffirm and explore aspects of their own identities without the emotional labor that can come as a result of cross-racial discussion groups. Our hope is that all our discussion groups are places to support healing and growth, and in turn, be a catalyst for individual and collective transformation."

After the PD

Solicit feedback and follow-up. At the end of your PD session, build time in your agenda for feedback. Remind participants of the purpose of your PD on an end-of-session survey. Ask your audience to rate on a scale of 1–5 how well you met that purpose. Or ask participants to articulate the purpose in their own words—you hope that what you receive aligns with your intentions. The following month, send a quick survey or do some informal polling about what people are still thinking

about related to your PD, or what they have transferred or tried; this information will help you consider additional steps, such as how to sequence future PD related to this topic, or what additional data might be needed to assess the impact of your PD.

How Lori and Dr. Deal Make the Learning Matter

In our hypothetical scenario, Dr. Deal and Lori consider their context: teachers who may be holding negative views and a “this too shall pass” mental model about PD. Lori and Dr. Deal consider how to communicate purpose to colleagues like Dan, Marcus, and Eileen (among many others). They think about how to tap into their colleagues’ strengths and leverage good relationships. Lori and Dr. Deal craft a plan to communicate purposefully and make the learning matter to everyone, from start to finish.

Dr. Deal encourages Lori to reach out to Eileen and ask her to help set the tone for the session. She knows if Eileen participates early on, others might as well. Lori then asks Eileen’s advice about who would be good models for the role-play. Eileen tells her that Dan and Marcus are extroverts and love to volunteer when they know what’s coming; she also shares the name of some additional teachers who could have a strong influence on the group. With Eileen and Dr. Deal’s support, Lori reaches out to these teachers, shares the purpose and topic of the workshop, and asks if they would like to help by volunteering for the model discussion.

Dr. Deal writes a brief blurb in her staff digest about the upcoming Wednesday PD. She also poses a question for teachers to think about in advance: *What student-centered discussion methods have been most empowering for your students?*

Lori spends a couple hours refining her agenda and creating a document that articulates the purpose, outcomes, and activities of the session. Dr. Deal and Lori review the agenda to ensure the purpose is clearly stated at the top of the document and next to each activity. Finally, Lori creates a feedback form and makes sure there is time at the end of the session to fill it out. She includes a question that asks teachers to articulate the purpose of the session in their own words. The time Lori and Dr. Deal have invested in determining purpose has given them greater clarity on why this PD matters.

Putting It All Together

Let’s revisit the dim school library where Lori will deliver her PD—this time having engaged with Dr. Deal in planning around purpose. As you read, identify how purpose shapes the direction of this session, from how it is communicated to how it shifts how participants engage in the learning.

Socratic Seminar PD Revisited

Dr. Deal addresses the staff: “I know I normally lead professional development, but as you know from last week’s staff digest, Lori Cohen is going to lead our session today. She recently came to my office, *very* enthusiastic about a student-centered discussion method called Socratic Seminars. This topic fits beautifully with our school’s mission: to empower students to become courageous leaders of the future.

“The purpose of this session is to help us reimagine classroom discussions as a place for all students to have access—where everyone can share their voices, where dialogue is welcomed over debate, where shared meaning-making can happen (even with competing viewpoints), and where the teacher creates conditions for student empowerment. You’ll see it written at the top of Lori’s agenda, too. We also know you have lots of your own ideas and strategies to help us reimagine class discussions. Your input was invaluable in helping shape today’s plans so we can best center the needs of all our students. Thank you. I’ll now pass it along to Lori.”

Lori steps to the front of the room, flips on the overhead projector, and posts the following question for teachers to discuss: *What student-centered discussion methods have been most empowering for your students?* She says, “Take the next five minutes at your tables, and generate a list of methods.”

Teachers gather at their tables and brainstorm discussion methods. They write their lists on flip charts and post them in the front of the room. Lori facilitates a discussion on themes people see across all the lists. She then asks, “What do you notice about these themes?”

Eileen raises her hand. “Some are related to our subject areas, but a lot of these are good techniques for any of our classes.” Lori thanks Eileen for sharing. A couple more people share.

“The purpose of starting with this activity is twofold,” Lori says. “First, I know, even after a short time at this school, that the wisdom and the expertise are in the room; I’ve learned so much from people here. Second, I invite you to consider today’s topic on Socratic Seminars as a case study for one kind of discussion method. I’d like you to consider what you might use from this session, what you might adapt. Ultimately, I hope you can walk away with at least one strategy that will be empowering for student-centered discussion.” A few heads nodded. “And if not, you have the feedback form at the end to share your input.” Dan laughed. Lori smiled.

When Lori asks for volunteers from different subject areas to engage in a mock demonstration, Dan raises his hand to participate. Marcus does, too. They both are extroverts and have prominent voices in the community. Dan makes a joke about math teachers and discussions, which brings some levity to the demonstration. Eileen volunteers, too. So does Dr. Deal.

At the end of the session, Dr. Deal asks teachers to write down one action item, something they'll try in their own classrooms. "I'll be asking you to let us know how it went in next month's PD session," she says.

Lori saves five minutes at the end for teachers to fill out the feedback form. As Dan walks out of the library, he approaches Dr. Deal. "That was fun," he says. "Not all these techniques might apply in math, but the brainstorm at the beginning of the PD got me thinking about something I could try."

Assessing Impact

Lori once worked with a colleague who was always energized at the end of the workshops they co-led: "That went really well!" he usually said.

Not trying to burst his bubble, Lori would follow up with, "How do you know? What changed for people?"

"I can just sense it," he would say.

As much as we might be able to sense whether a workshop went well (perhaps participants are smiling on their way out of the session, or they are talking about what a great workshop it was), we don't really know whether the PD fulfilled its purpose until we assess the impact, until we measure the changes in practice. The more measures we use, the better.

Five Measures of Impact

How do you measure the impact of your PD sessions? How do you know whether you met your purpose and whether participants learned? As you look at the questions listed next, consider which ones you might use to assess the impact of your PD. What other topics and questions would you include in this list?

- *Participants' responses to the workshop:* How did they feel about the experience?
- *Participants' learning:* What did participants learn, and what can they do as a result of this PD?
- *Organizational change:* How does participant learning support site and systems-level change?
- *Participants' application of new knowledge or skills:* How are teachers applying this learning in classrooms?
- *Student learning outcomes:* How are students benefiting from this PD and getting what they need to thrive?

These topics and questions, influenced by Thomas R. Guskey's work on evaluating professional development (2002), allow PD leaders to determine the impact of PD from the participant experience to how the PD creates change for students. Each of these measures—from the most immediate to the long-term, and from what we can most influence to what we have the least control over—allow PD leaders insight into what's working, what isn't, and what's leading to transformational outcomes for adults, and ultimately, for students.

Participants' Reactions

"If you get the inside right, the outside will fall into place."

—Eckhart Tolle

The most immediate feedback PD leaders will receive is participants' reactions—the responses participants have as a workshop ends. This is an area you have the most influence over. You might do a visualization before your PD and imagine what people will do, say, and feel as a result; perhaps imagine your workshop as a party with honored guests, and as they leave you identify some things they might say to one another on the way out of the room, such as "That was so purposeful" or "I wish PD was always like this." Thoughts are powerful, and they can shape the reality we create.

Through feedback forms and formal/informal conversations, a PD leader can learn almost immediately how people felt about the experience. As Dan leaves the library in our hypothetical scenario, he says to Dr. Deal, "That was fun." In the chat at the end of Bright Morning virtual workshops, participants often share enthusiasm for the experience, making comments like, "Best PD I ever experienced" or "This was transformative. So many tools I can try immediately."

Like Lori's former colleague, sometimes you can actually just sense how a PD went. Facilitators with a high level of self-awareness or a strong intuition can sometimes feel when a PD is successful; the mood in the room feels good, there's lively chatter after a session, or people leave energized. These may not be formal pieces of data, but they are important indicators of a PD's success, at least in the immediate moment.

Unfortunately, when participants have an unpleasant experience in a PD, they rarely share their feedback directly with the facilitator. Sometimes people silently walk out of a room saying nothing to the facilitator (ouch), or participants fill out an anonymous survey with scathing feedback or low ratings. These types of responses

can sting. In moments like these, it can feel personal. In Chapter 2, we offer tools for how to engage the emotions—pleasant and unpleasant—you or participants might be having in PD. Chapter 7 also provides a process to facilitate adaptively when your PD goes off course.

Tips and Tricks:

Buddhist practitioner Ruth King (2018) offers a mantra we use when our PD doesn't go as we intended: "It's not permanent, personal, or perfect." This mantra allows us to loosen our grip on self-criticism and the unpleasant feelings that can come when a workshop or session doesn't go well.

Participants' Learning

The second measure of impact is identifying what participants learned or are taking away from the experience. This measure gets at the practical ideas and big takeaways of the PD—ultimately, what participants now know or can do as a result of what they learned. This assessment happens during a PD session as facilitators check for understanding or circulate the room as participants engage in activities. This assessment also happens at the end of a workshop as participants identify key learnings and which activities were most useful.

At the end of Bright Morning workshops and on our final feedback form, we ask participants to identify specific takeaways from the experience; sometimes we also ask participants to create an action step or two based on these takeaways. This data helps us understand which activities and resources had the greatest impact. Some PD leaders might ask participants to fill out an "exit ticket" that describes their experience. One of Lori's favorite exit tickets is a process called "Triangle, Circle, Square," which asks the following:

- *Triangle*: What are three big points you're taking from this PD?
- *Circle*: What is a question or topic that is still circling in your mind?
- *Square*: What is something that is "squaring" (resonating) with you from this session?

Flipping through the index cards with participants' responses, Lori can assess how the feedback successfully fulfills the PD's purpose. She can also use the "circle" portion of feedback to inform future PD sessions she leads.

Organizational Change

The third measure of impact asks how learning is supported beyond the workshop and how changes are implemented over time. This is a measure you have less control over, especially if you are outside an organization. This is a measure that may not be immediately visible either.

Perhaps participants were transformed in the workshop itself, but more work may need to be done to make change at the organizational level. Perhaps staff are working on conversation practices to build a healthy school culture, but shifts in culture take time. If the PD is a one-off experience, it might not lead to the kind of organizational change a site is seeking (which is also why we advocate for PD that is ongoing).

PD providers measure this by looking for evidence of cultural shifts or policy changes that occur as a result of the PD. Participants in Bright Morning's *Art of Coaching Teams* workshop often cite how the tools from the book and the workshop change the culture of how their teams work together. One statewide organization attended a series of Bright Morning *Coaching for Equity* workshops, and in a six-month follow up, leaders in the organization shared the equity conversation protocols staff use and how these workshops "have changed the kinds of conversations we're having." It's helpful to follow up a month, six months, or even a year after a PD to determine its impact.

Participants' Use of New Knowledge or Skill

The fourth measure assesses how participants are using their new knowledge or skills, which also is implemented over time. If you are an internal PD provider, you have better access to whether participants are using what they learned. If you're an external provider, you may be able to follow up with participants, though sometimes you may need to trust the process; ideally, if participants were transformed by the PD, then they will apply what they learned.

Site leaders and coaches might use formal and informal modes of data gathering to assess how teachers are applying what they learned. Professional learning communities (PLCs) might share strategies they are trying along with student work samples. Classroom walk-throughs, peer observations, coach observations, and student performance data are all ways to learn about how learning is transferred from PD into classrooms and schools.

In our hypothetical scenario, Dr. Deal shares how she wants teachers to bring an "artifact of practice" to the next PD session. In real life, when Lori first learned about Socratic Seminars at the College Success Conference, she tried them in her class the following week; the implementation of this discussion

method took a few rounds before it became routine. From that point forward, though, Socratic Seminars became one of Lori's go-to routines, and students often asked for Socratic Seminars whenever they were about to have a class discussion.

Student Learning Outcomes

Finally, the fifth—and most important—measure of impact is how PD creates meaningful outcomes for students. After all, that's why we're all in this field. We hope that participants will leave PD with the knowledge, skills, and habits to create equitable learning conditions for students. We hope that as educators walk through classrooms or review student work samples or build relationships with young people, they see clear evidence of student engagement, learning, and growth.

To measure impact on student learning, it's helpful to gather a range of data beyond quantitative measures, data that also measures how students feel and what skills they can demonstrate—what they can apply and create that's not necessarily reflected on a mandated exam. As you think of the PD you're leading, what student data would best reveal the impact? How might you look for evidence of change for students?



More than two decades have passed since Lori led that first workshop on Socratic Seminars. Among the many lessons Lori has learned about PD since then, the most fundamental one has been this: When purpose is clear, everything else falls into place. With a clear purpose, the outcomes are stronger. The activities are more relevant, and participant engagement is greater. The learning is more meaningful, oftentimes more joyful. The facilitation is easier. Lori also learned that the process for determining purpose doesn't have to be done in isolation. It takes all of us to contribute to systems change that can best support our students. What might be possible if your PD is guided by purpose?

Before You Go

Pause and Process:

- What is the role of purpose in your PD?
- Among the ways to determine purpose outlined in this chapter, which ones might you try?
- How will you communicate the purpose of your PD?
- What measures might you use to assess the impact of your PD?

Remember:

- Purpose is foundational for transformational professional development.
- For everything you do in relation to your PD, ask *why*.
- Communicate purpose before, during, and after your PD.
- Use multiple measures to assess the impact of your PD in the short and long term.

