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Reflections on Developing a Cross-Institutional Inquiry Project

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INQUIRY BRIEF:
REFLECTIONS AND TOOLS

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Introduction

Jennifer Robinson, Executive Director of the Center for Pedagogy at Montclair State University and Rebecca Cheung, Director of the Principal Leadership Institute at the University of California, Berkeley, are helping to lead a collaborative inquiry group comprised of three different institutions: Montclair State University, University of California, Los Angeles (UCLA), and University of California, Berkeley (UC Berkeley). This brief captures protocols and processes they used to support effective collaboration in the design of their inquiry project proposal.

Reflections

It can be very hard to coordinate schedules to get everyone to a meeting. How do you handle that?

With a large inquiry team, it can be challenging to get everyone together multiple times in a short span of time. This project involves three teams on two coasts, so full group meetings are held virtually. Rebecca and Jennifer do not require every participant to attend every meeting, but have set a goal for the majority of participants to be present (~80 percent) in order to conduct a meeting. Some participants from the same institution are rotating on and off meetings. This allows for flexibility but also ensures that voices from each institution are present and people who missed the meeting can be filled in by a teammate. In addition, Rebecca and Jennifer speak to individuals and groups at their institutions separately to ensure everyone's voice is heard and is kept up to date on the project.

How do you ensure that everyone's voice is heard while also being efficient about the use of meeting time?

Jennifer and Rebecca do pre-work with their team members to honor people's time and make their meetings meaningful and efficient. They prepare participants for meetings in advance by having conversations with

About EdPrepLab

Educator Preparation Laboratory (EdPrepLab), an initiative of the Learning Policy Institute and Bank Street Graduate School of Education, aims to strengthen educator preparation in the United States by building the collaborative capacity of preparation programs, school districts, and state policymakers. Linking research, policy, and practice, EdPrepLab supports preparation programs that are equity-focused, student-centered, and grounded in the science of learning and development and seeks to expand these approaches nationwide. This brief describes a portion of inquiry-based work between three members of the EdPrepLab network: Montclair State University, University of California, Los Angeles (UCLA), and University of California, Berkeley (UC Berkeley).

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Reflections

key stakeholders, and hold individual meetings with institutional teams before they conduct a larger meeting with the three institutions together. This allows them to get feedback and prepare their team to share ideas, and it also builds trust and rapport with their respective institutions. For example, in advance of their first group meeting this fall, Jennifer met with the teacher preparation team at Montclair State to talk about how they would gather data on students' experiences in their program and help faculty understand their needs. In addition, Rebecca and Jennifer share the documents they will be reviewing at the meeting a few days in advance so that everyone can read them.

How does one create individual investment for each team member?

Though Rebecca and Jennifer lead the inquiry team and the meetings, from the start they wanted to make it clear that the group was not hierarchical and that there was a lateral relationship across all participants, including themselves. They wanted everyone to feel ownership over the work and feel invested, so at the first big group meeting to work on their inquiry group proposal, they didn't jump right into agenda items. Instead, they opened the meeting by asking everyone: "Why are we here? What do we want to get out of this?" Everyone shared their primary interest and what they wanted to get out of the experience. Each person articulated what they wanted the inquiry to be about, and this helped them quickly come to consensus about inquiry purpose and questions. Leaving this space open allowed for dialogue and discussion about what people wanted to learn and spend time on, and naturally flowed into determining the inquiry process and structure. For future meetings, they would like to leave space at the beginning for every participant to share why they are committed to their inquiry topic.

How do you co-facilitate meetings?

Jennifer and Rebecca have split up their roles for preparing and facilitating the meetings and have found this to be a very successful strategy. For example, for the first meeting, Jennifer created the meeting agenda in advance and Rebecca gave feedback, so they were both clear on the goals, purpose, and structure of the meeting and what their roles would be. Jennifer led the facilitation of the meeting while Rebecca took notes. This allowed Rebecca to pick up themes and insights from what people were saying and she could synthesize them and type them up. In this particular group, they had presented two options for inquiry but as the meeting was happening, Rebecca was able to listen carefully and hear a third, new option appear. She was able to capture the idea and introduce it in the context of the meeting and the team was able to get to a place where they could respond to it. This would have been very challenging with just one facilitator because when you are facilitating a meeting, you often miss things when you are taking notes.

What tools work best for online meetings?

Rebecca had prior experiences with facilitating online meetings, so she was able to draw on what she had learned works well. They have been using Zoom for their virtual meetings and Google Docs for documentation. This allows participants to make notes, questions, and comments in the document during the meeting and use the group chat feature in Zoom. Rebecca and Jennifer have noted that online meetings can actually be longer because you depend more on audio than when in person, so it is a good idea to make this explicit to your team members if they have not done a virtual meeting before.

How do you involve everyone in the development of the inquiry question and proposal?

Based on numerous previous conversations with Jennifer and other team members, Rebecca created a rough draft of the proposal in advance of the meeting. She put it together so that it was structured in the same way the proposal guidelines indicated, but made sure it wasn't so complete that it wouldn't allow for choice and voice from the other team members. It was very clear that it was not complete and that people needed to give input. She ended up sharing two possible options for the structure and process of their inquiry. Each idea had bullet points and notes for people to review in advance of the meeting, with enough open space to allow people to enter the collaboration process by asking questions and filling in gaps. The openness also served the purpose of keeping the group from going into wordsmithing and instead focusing on the content of possible activities.

During the meeting, everyone was able to respond to the proposal and talk through the pros and cons of each option. Because everyone had done the pre-meeting work of reading the proposal, they could focus on it more efficiently in the meeting.

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Also, before they got to reviewing the proposal at the meeting, the broader discussion around goals and interests allowed them to answer a lot of questions that were embedded in the proposal without directly looking at it. So by the time they got to actually looking at the proposal together, they were able to note that they had covered a lot of the components already in their discussion and they had plenty of time to focus on timeline and budget. Their meeting was only 1.5 hours, and they felt this strategy allowed them to not get stuck on the first few parts of the proposal.

Is it better to focus on broad ideas or more granular items when you are getting feedback on the proposal and developing it collaboratively?

Rebecca and Jennifer wanted to structure the agenda so that people could think broadly about concepts related to the proposal but also dig into more granular, logistical issues. For example, one question that came up with a lot of logistical implications was: What would a site visit look like? Would it be two days? Three days? The group decided it would be 1.5 days, consisting of a dinner the night before, so they could use the time to frame what the site visit would look like and allow people to ask questions ahead of time. Then they decided there would be a whole day that might be observing work in action. This meant they had to dig into logistics in the planning, such as making sure the site visit is scheduled so that students are in classes and people can see things they want to see. They also decided they wanted some of the site visit to allow for time with each other with our respective teams talking, cross-institutionally, about specific areas. So from the broad, they were able to narrow down to tangible things and make some decisions together.

Sometimes the original idea you come up with is too ambitious in scope. How do you refine your inquiry idea from idealistic to realistic?

Rebecca and Jennifer presented two possible options to their group, but a third option came up at the meeting. This emerged out of the discussion while people were talking and sharing concerns and constraints they might have to deal with. This allowed the proposal to go from idealistic to realistic. It was a natural shift from facilitator to mediator as questions and ideas were shared, Rebecca and Jennifer were careful to focus on getting to an idea that would help everyone get to their goal, and noticed when they had to stop and clarify. For example, for this project, they had made an assumption that everyone had experience or knowledge with a Critical Friends Network and the consultancy process, but at least half of the group did not. So they had to take some time out to explain this and make sure that everyone understood it before moving forward so they could make informed decisions.

How do you handle concerns that come up during the process?

Rebecca and Jennifer have been able to use concerns to drive their work forward. For example, when one team member was concerned about sharing information related to sensitive topics across teams, they used it as a way to incorporate trust building across institutions. They recognized it was a real challenge, but a lot could be learned, and they used it as an opportunity to help build in work to hopefully mitigate this.

How do you get everyone to collaborate and participate?

Jennifer and Rebecca are letting their participants decide how they can best participate and contribute, instead of mandating how participation should be. They save time at their meetings to ask for volunteers to participate. For example, during the proposal process, some people wanted to help write the proposal while others were willing to give feedback on it. If some team members were happy to let other team members take the lead on writing and giving feedback, and comfortable to let others shape it, then that was fine. They are keenly aware of how busy their team members are and they don't want to overtax people from their institutions. They would like to always invite people to participate and give feedback, but they also don't want to make assumptions about how people want to be involved.

CONVERSATION GUIDE: BRAINSTORMING INQUIRY QUESTIONS WITH YOUR CROSS-INSTITUTIONAL OR INTRA-INSTITUTIONAL TEAM

Ground your discussion in the line(s) of inquiry you've chosen: Your team should have previously identified a line(s) of inquiry that you will explore.

- Line 1: Build coherence across preparation programs for multiple educator roles to prepare candidates to work collaboratively for deeper learning and equity within the pk-12 system
- Line 2: Work in partnership with local communities and consider the local contexts that shape pk-12 schools to prepare educators focused on deeper learning and equity
- Line 3: Systematically approach faculty development for equity within and across programs
- Line 4: Improve curricular and instructional practice of teacher and leader preparation for deeper learning (e.g., modeling, performance assessment)

Explore ideas: With your team, discuss the ways in which you might approach the line(s) of inquiry you have chosen. Think about:

- What have you observed/know is happening in your context that relates to the goals of this inquiry? What do you infer is happening?
- What questions or curiosities do you have about what you are noticing?

Brainstorm questions: Create a list of possible inquiry questions based on your exploration. If you have a group larger than three, you may wish to break into pairs or small groups and then share out.

Once you've crafted one or more questions, the questions below can be used to help your team reflect to ensure that your question is meaningful, open ended, and the appropriate scope.

Questions to consider:

- What is your fundamental purpose?
- What is the key question you are trying to explore?
    Are their sub-questions for each institution involved in your group or will you all explore the same key question in the same way (e.g., trying out a particular deeper learning pedagogy in a methods course)?
- What information will you need to answer your question(s)?
- What assumptions are you making?
- What is your point of view in respect to this inquiry?
- What are the implications or ideal results of this work if it is successful?