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FORWARD

Greetings,

I am excited to present the Spring 2018 issue of *Research Issues in Contemporary Education* (RICE). This issue contains the Raymar Harchar Award and Graduate Student Award papers from the 2017 LERA Conference. In addition to these award-winning articles, I am pleased to report that there are five double blind, peer-reviewed articles. The articles in this edition cover a broad scope of contemporary issues in education, ranging from teacher self-efficacy among pre-service math teachers to the struggles that twice-exceptional learners and their parents face when negotiating the K-12 educational landscape. This issue also includes articles on the history of Black museums and experiential learning, an evaluation of site certification for language immersion programs, and a case study on managing effective learning in online settings. I would like to express my gratitude to the contributing authors and to those who participated in the peer review process. For those who reviewed articles and provided sage feedback, your service was valuable in meeting the goals of RICE.

The editorial board would like to announce the next submission deadline for the upcoming issue. Articles must be 3,000-5,000 words, excluding references, and follow the guidelines in the 6th edition of the APA Manual. RICE publishes educational research studies, literature reviews, theoretical articles, and position statements regarding current educational issues. Submission implies that the manuscript has not been published or is not under review elsewhere.

There should be no author identification in the article itself, but the cover page must include the author identification and contact information. Manuscripts should be submitted electronically in MS Word at rice@leraweb.net. The deadline for the Spring-Summer edition is **January 10, 2019**.

RICE is committed to supporting and showcasing the research of up-and-coming scholars pursuing Master's and Doctoral degrees in Education-related areas of study, including Leadership, Theory, Exceptionalities, and Curriculum. For this reason, we are inviting current graduate students to submit work for the Graduate Research and Scholarship section of the journal. LERA encourages graduate students to submit their work for publication in RICE, as well as submit proposals to present at the LERA Annual Conference. Manuscripts submitted for the Graduate Research and Scholarship section of RICE should include "GRS" in the subject line of the submission email.

Sincerely,

Natalie Keefer
Managing Editor
University of Louisiana at Lafayette

Margaret G. Bienvenu and Linda Fairchild
Graduate Student Editors

RAYMA HARCHAR OUTSTANDING RESEARCH PAPER AWARDS

The Development of the School Reform Model and the Reform Readiness Survey

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Abstract

Reform is a common tool used by policymakers to increase student achievement, yet some reform efforts are more successful in some schools and not others. This study looks specifically at the following constructs related to both student achievement and reform: school culture, school climate, teacher efficacy, and collective efficacy. The overarching question explores the relationships among school culture, school climate, teacher efficacy, and collective efficacy and their impact on reform movements. In order to assist leaders when implementing organizational change, the newly created Reform Readiness Survey, which addresses culture, climate, efficacy, and leadership, is validated and found to be a reliable measure.

Keywords: school culture, collective efficacy, and reform

Introduction

Reform is nothing new for educators. Education in the United States has been in a constant state of reform since President Bush signed the No Child Left Behind Act of 2001, which called for increased accountability for schools and districts by using school performance scores. Districts across the nation urgently sought new ways to increase test scores, which were often tied to funding. This put more pressure on school leaders and teachers to use data and other resources to increase student performance. In 2012, Race to the Top was enacted, which required states to commit to a national set of standards and overhaul their current teacher evaluation systems in order to receive a sizable amount of federal dollars (Boser, 2012).

Even though student achievement was positively affected in some areas, the United States still has failing schools and struggling districts. Many states are working to overcome teacher shortages (Gardner, 2015). In fact, in Louisiana, during the first two years of reform in compliance with Race to the Top, the state experienced a 24% increase in teacher retirees—more than 7,500 teachers retired from Louisiana public schools. This number does not include teachers who left to pursue other careers (Shuler, 2013). Obviously, reform itself is not the only key to student achievement or school improvement.

Many reform efforts have cost districts and states inordinate amounts of money, time, and personnel, and unfortunately, many have not been successful and/or sustainable. Fullan (2006) suggests that reform movements are only successful for those who understand theories of change as well as educational theories. Although reform itself is not the key to increasing student achievement, research has demonstrated that school culture, school climate, teacher efficacy, and collective efficacy affect student achievement (Bandura, 1997; Cavanaugh & Dellar, 1997; Cohen, Fegé, & Pickeral, 2009; MacNeil, Prater, & Busch, 2009; National School Climate Council, 2007; Peterson & Deal, 2009; Stolp, 1994; University-Community Partnerships, Michigan State University, 2004). This study seeks to integrate these concepts for the purpose of proving theoretical and practical contributions to the educational research field.

While numerous variables are at play during reform, several of which are school- and district-specific, school culture, school climate, teacher efficacy, and collective efficacy are constructs which are often unaccounted. District leaders and school principals need additional support before and during the implementation of reforms, especially those involving second-order changes. This study explored the literature

regarding the possible effect that school culture, school climate, teacher efficacy, and collective efficacy have on reform movements.

The purpose of this study is to (1) assess the latent structure of the newly designed Reform Readiness Survey; (2) determine the relationship between school culture and reform; (3) determine the nature of the interaction among school culture, school climate, teacher efficacy, and collective efficacy; and (4) determine the nature of the interaction among school culture, school climate, teacher efficacy, and collective efficacy in relation to change. The overarching question for this study is: *What is the relationship or impact of school culture, climate, and collective efficacy on reform movements?* Three other questions also guide this study. *First, what is similar and contrasting among the constructs? Second, how are the constructs interrelated? Third, in what ways can these constructs impact school reform efforts?* Hence, this study explores school culture, school climate, teacher efficacy, collective efficacy, and change as well as the subcomponents of these constructs in an effort to determine the nature of the relationships among them. Little research has been conducted that links comprehensive research on each of the aforementioned constructs including the possible impact that these constructs have on school reform efforts.

This study endeavors to ascertain the nature of the interaction among the following variables: school culture, school climate, teacher efficacy, and collective efficacy by using quantitative methods. Data were collected from surveys representing each construct and were aggregated and subjected to statistical analyses in order to answer the research questions and hypothesis. The following measures were used in this study to determine strengths of correlations among constructs: the Revised School Culture Elements Questionnaire (RSCEQ), which measures perceptions of culture; Organizational Climate Index (OCI), which measures perceptions of school climate; Teachers' Sense of Efficacy Scale (TSES), which measures teacher efficacy beliefs; Teacher Efficacy Beliefs Scale- Collective (TEBS-C) which measures collective efficacy; and the newly created Reform Readiness Survey (RRS) which measures change readiness. Correlations among each subscale in the measures were conducted as well as factor analyses on the newly created measure, the RRS.

The sample population for this study is a large school district in central Louisiana, and includes 46 schools, grades pre-kindergarten through 12th. Data were collected through SurveyMonkey, an online program designed for survey research and data analyses. Data were then exported to IBM SPSS Statistics in order to conduct further statistical analyses.

School Culture

Although the concept of culture is deeply rooted in anthropology, the term *school culture* is commonly used to describe an organization's unique personality that encompasses shared norms and values, traditions and rituals, behaviors, purpose, and operational frameworks. The culture of an organization can shape people's perceptions, and conversely, these perceptions shape the culture of the organization. Practically, school culture "influences everything that goes on in schools: how staff dress, what they talk about, their willingness to change, the practice of instruction, and the emphasis given on student and faculty learning" (Peterson & Deal, 1998, p. 28).

Over the last 50 years, research concerning school culture has significantly increased due to the findings about the impact school culture has on school effectiveness (Van Houtte, 2005). School culture is described as encompassing layers, or levels of abstraction (Hoy & Hoy, 2003; Schein, 2010). These levels are characterized by their nature of visibility. Researchers agree that the first level, which is most visible, is the easiest to change; the last level is the most difficult to change (Schein, 2010). The most abstract level is the most complex, and is characterized by Hoy and Hoy (2003) as encompassing the tacit assumptions or deep-seeded beliefs that organizational members possess.

Fiore (2001) used an analogy that inspired the conceptual framework. He likened culture to the part of an iceberg that furtively lies below the surface of the ocean, providing the structure and support for the top of the iceberg, which represents school climate. Culture remains stable and is difficult to change. School climate, much like the top of the iceberg, is more easily perceived among outsiders and members of the organization, yet

it is easily affected by environmental factors, such as wind and waves. Van Houtte (2005) explains, “Climate researchers measure how organization members perceive the organizational climate, while culture researchers look for what members think and believe about themselves” (p. 75).

School culture and climate affect the school in similar ways—both can affect the way outsiders view the school and both can impact student achievement (Cavanaugh & Dellar, 1997; Cohen et al., 2009; MacNeil et al., 2009; National School Climate Council, 2007; Peterson & Deal, 2009; Stolp, 1994; University-Community Partnerships, Michigan State University, 2004). Both are used to describe the atmosphere or the character of a school. However, practitioners should have an understanding of the differences between the constructs in order to transform schools.

School Climate

The National School Climate Council (2007) views school climate as “the quality and character of school life” (p. 5). The National School Climate Council (2007) also stated, “It [school climate] is based on patterns of school life experiences and reflects norms, goals, values, interpersonal relationships, teaching, learning and leadership practices, and organizational structures” (p. 5). School climate reflects the norms, goals, and values that are deeply rooted in the culture of a school. Five elements comprise school climate: safety, relationships, teaching and learning, institutional environment, and process of school improvement (Thapa et al., 2012).

Research has demonstrated that a positive school climate is essential to academic achievement and school success (Cohen et al., 2009; MacNeil et al., 2009; National School Climate Council, 2007; University-Community Partnerships, Michigan State University, 2004). The following are themes of common effects of school climate found in the literature: promotes academic achievement, fewer discipline problems, less anxiety and depression, high attendance rates, and helps teachers feel successful in the classroom (Cohen et al., 2009; MacNeil et al., 2009; National School Climate Council, 2007; University-Community Partnerships, Michigan State University, 2004).

Teacher Efficacy

Bandura’s (1977) foundational research concerning self-efficacy is at the heart of teacher efficacy. Self-efficacy refers to a person’s beliefs about his or her ability to accomplish a task with competence or effectiveness in a specific domain. The level of self-efficacy a person possesses may inhibit or enhance the performance of a person. Bandura (1993) explains that self-efficacy influences each of the four major processes—cognitive, motivational, affective, and selection.

Teacher efficacy operates similarly, with the exception of specificity of the domain—which is student learning. Hoy and Hoy (2003) define teacher efficacy as such: “a teacher’s belief that he or she can reach even difficult students to help them learn” (p. 129). Teacher efficacy is also influenced by the four sources of efficacy beliefs outlined by Bandura (1977): mastery experiences, vicarious experiences, verbal persuasion, and psychological factors. Just as a person with a high sense of self-efficacy tends to be more motivated, highly efficacious teachers persist despite negative interactions with difficult students. These individuals hold strong beliefs in themselves and their students (Hoy & Hoy, 2003).

One of the many effects of efficacious teachers is an increase in student achievement (Bandura, 1997; Berman, 1977; Dembo & Gibson, 1985; Goddard et al., 2000; Tschannen-Moran et al., 1998; Tschannen-Moran & Hoy, 2001; Ware & Kitsantas, 2007). Surprisingly, teacher efficacy has a greater effect on achievement than student socioeconomic status (Bandura, 1993; Goddard et al., 2000). Teachers with strong efficacy beliefs tend to be more willing to change and see to the success of the change (Berman, 1977).

Tschannen-Moran et al. (1998) worked to conjoin foundational conceptual frameworks by several researchers, including Bandura (1993) and Gibson and Dembo (1984), by analyzing the methodologies and psychometrics of their measures, later resulting in the measure used in this study.

Collective Efficacy

“Collective efficacy is the shared perception of teachers in a school that the efforts of the faculty as a whole will have a positive effect on student learning” (Hoy & Hoy, 2003, p. 296). Collective efficacy plays a powerful role in the school setting because teaching is performed in a group context. Individual efficacy for a teacher impacts only his or her classroom; conversely, collective efficacy impacts the school as a whole.

Bandura (1997) explains that collective efficacy is not simply the compounding of each individual’s efficacy levels. Collective efficacy is one aspect of a group’s emergent property. However, the sociocognitive determinants—mastery experiences, vicarious experiences, verbal persuasion, and psychological factors—operate the same way for a group.

Collective efficacy is also an important aspect of school culture and climate (Bandura, 1993, 1997; Berman, 1977; Dembo & Gibson, 1985; Tschannen-Moran et al. 1998; Ware & Kitsantas, 2007). In fact, much like culture and climate, school faculties that have developed a strong sense of collective efficacy can raise student achievement (Bandura, 1993, 1997; Hoy & Hoy, 2003; Moolenaar, et al., 2012).

Change Theory

The two types of change that Marzano (2005) describes are first-order change and second-order change. First-order change is usually surface-level, gradual, and incremental. These changes are typically guided by past experiences. Second-order change, however, is more drastic, and requires a change of mindset. Second-order change solves problems by using innovation instead of past thinking (Marzano, 2005). Since second-order change is more complex, it requires a change in culture for an organization. If a reform is supported by the culture of the school, the change is more likely to sustain. In fact, Allen et al. (1998) submits that without a supportive culture, change is sustained less than one year. Researchers generally refer to the stages of change as a three-part process: initiation, implementation, and sustainability (Fullan, 2007). This study focuses on organizational readiness for reform.

Development of the Reform Readiness Survey

The RRS is an assessment designed to determine the current status of schools concerning the domains of culture, climate, teacher efficacy, collective efficacy, and change research, before embracing reform. The RRS was birthed from the conceptual framework for this study. After extensively reviewing the literature, the researcher discovered evidence linking four variables—school culture, school climate, teacher efficacy, and collective efficacy—and change. Furthermore, the success of reform in schools was linked to the strength of the perceptions of said constructs. Therefore, the RRS was created in order to evaluate the readiness of organizational reform.

The researcher wrote each item in the measure by synthesizing the literature concerning the study’s constructs. The measure assesses the perceptions of teachers about themselves, their school faculties, and administrators. Teachers were asked to read each statement carefully and select the scale point that best reflects their personal degree of agreement with each statement. The RRS used a six-point Likert scale ranging from 1 = *Strongly Disagree* to 6 = *Strongly Agree*.

After a series of factor analyses, a total of 40 items were retained within the four components that comprise the RRS: Teacher Efficacy in Relation to Reform (Component 1), Culture and Climate in Relation to Reform (Component 2), Change Leadership (Component 3), and Collective Efficacy in Relation to Reform (Component 4). These four components account for 70.5% of the variance.

The Cronbach’s alpha reliability for the entire measure is .976. All four components are found to be highly reliable. For each subscale, the reliability coefficients are as follows: Teacher Efficacy in Relation to Reform (.940), School Culture and School Climate in Relation to Reform (.954), Change Leadership (.940), and Collective Efficacy in Relation to Reform (.946).

Research Questions and Hypothesis

The following research questions were addressed by quantitative analyses: (1) *What is the latent structure of the newly created Reform Readiness Survey?* (2) *What is the relationship between school culture and reform?* (3) *What is the nature of the interaction among school culture, school climate, teacher efficacy, and collective efficacy?* (4) *What is the nature of the interaction among school culture, school climate, teacher efficacy, and collective efficacy in relation to change?* The following hypothesis was also addressed by quantitative analysis: *There is a statistically significant, positive relationship between teachers' perceptions of school culture and change.*

Methodology

Quantitative research methods were used in order to test the hypothesis and answer the research questions regarding the variables in the study. Data were collected from a sample population, which includes 46 brick-and-mortar schools, K-12, located in a large centrally located Louisiana district. These schools are representative of state demographics, including school grade configuration and school performance letter grades. Some schools are located in rural areas and others in the inner city. A total of 1250 teachers submitted responses; however, 1155 usable surveys met the criteria for analysis. Data analyses includes descriptive statistics and demographics for the sample, descriptive statistics for each item, factor analyses of the Reform Readiness Survey, inter-item correlations for the RRS, reliability analyses for the RRS as well as factored subscales of the RRS, and bivariate correlations among all subscales of each measure. The following section outlines the research questions and hypothesis as well as the major findings, conclusions, and implications of the study.

Major Finding Number One

The Reform Readiness Survey developed for use in this study to assess the readiness of organizational change demonstrated satisfactory psychometric qualities (validity and reliability).

The Cronbach's alpha reliability for the RRS is .976. All four components of the RRS were also found to be highly reliable. For each subscale, the reliability coefficients are as follows: Teacher Efficacy in Relation to Reform (.940), School Culture and School Climate in Relation to Reform (.954), Change Leadership (.940), and Collective Efficacy in Relation to Reform (.946). Therefore, the RRS is purported to measure that which it was designed to measure. The factored subscales of the measure loaded as expected, with four major components explaining 70.5% of the variance. Very few items double-loaded or triple-loaded after the initial factor analysis, and no items double- or triple-loaded after the second factor analysis. The measure was reduced from 42 items to 40 items.

Major Finding Number Two

School culture and school climate, although two discrete constructs, are perceived by teachers to be similar and/or one in the same.

During the creation of the measure and the pilot stages of the measure, the researcher assumed that after the exploratory factor analysis, five factors would emerge, with school culture and school climate loading as separate components. However, the initial factor analysis, intended for item reduction using the pilot survey data, revealed that teachers view school culture and school climate similarly. These two constructs loaded on the same factor. However, all other constructs in the study, teacher efficacy, collective efficacy, and change leadership loaded on separate factors. In the subsequent factor analyses for this study using the sample population, school culture and school climate loaded on the same component as well. This confirms the research regarding the strong relationship between school culture and school climate (Fiore, 2001; Hoy & Hoy, 2003;

Van Houtte, 2005). However, although researchers conceptualize the terms separately, teachers view the constructs as the same.

Major Finding Number Three

Of all the constructs in this study, school culture has the strongest relationship with reform.

All subscales of the RSCEQ are strongly correlated with the subscales in the RRS. In fact, of all the correlations among constructs, the strongest correlations occur between school culture and reform. School climate does not correlate as strongly with reform as school culture did. This affirms research by Allen et al. (1998) and Fullan (2007, 2009), who assert that in order for change to be successful and sustainable, one must address school culture. Furthermore, Wagner et al. (2012) discuss the importance of school culture in systematic thinking when approaching reform for educational organizations. Reform requires a shift in culture.

Major Finding Number Four

Collective efficacy is significantly related to reform, culture, and climate.

Collective efficacy is significantly correlated with school culture, school climate, and reform, with slightly stronger correlations occurring between collective efficacy and school culture. Overall, the Pearson's correlations generally range from .600 to .750. The results from this study support Bandura's (1997) assertion that collective efficacy affects the whole school. Furthermore, Tschannen-Moran et al. (1998) confirm that collective beliefs are an important factor in the school's culture. This study supports these findings. Hoy and Hoy (2003) define collective efficacy as shared beliefs among organizational members, just as culture and climate are said to embody a shared belief system. The researcher did not expect that collective efficacy would be so strongly correlated with change; however, when considering the close relationship among collective efficacy, school culture, and school climate, this should not be surprising.

Major Finding Number Five

Although collective efficacy is related to reform, culture, and climate, it is not as significantly related to teacher efficacy.

Although collective efficacy and teacher efficacy share the same cognitive and behavioral sources: mastery experiences, vicarious experiences, verbal persuasion, and psychological factors (Bandura, 1997), collective efficacy does not have a strong correlation with teacher efficacy. This is likely due to the emergent properties of groups and the lack of the compounding of individual efficacy of group members, as Bandura (1997) explains in his research. In other words, this study corroborates the idea that a highly efficacious teacher can have a low sense of collective efficacy due to the number of inexperienced or weak faculty members. Or, conversely, a teacher with a low sense of self-efficacy can have a strong belief that his faculty can positively impact student learning, which translates to a high sense of collective efficacy.

Major Finding Number Six

Teacher efficacy is not significantly correlated with reform.

The sixth major finding of this study was surprising to the researcher, and challenges the original conceptual framework. Although teacher efficacy is correlated with reform, the correlations are not strong, only weak to moderate. This may be due to the crux of self-efficacy, which is *self*. Individual's perceptions of himself or herself correlate less with reform than do whole-group constructs, such as culture, climate, and collective efficacy. Few studies explicitly correlate teacher efficacy to reform. Many researchers agree that teacher efficacy is increased with professional development (Bruce, Esmonde, Ross, Dookie, & Beatty, 2010; Goddard, et al. 2000; Klassen & Chiu, 2010; Tschannen-Moran & Johnson, 2011; Tschannen-Moran &

McMaster, 2009); however, professional development does not always indicate that true reform is taking place in the classroom or school-wide. Tschannen-Moran et al. (1998) describe highly efficacious teachers as being more willing to implement changes within their classrooms without grumbling. Perhaps this supports the slight correlation with reform in this study.

Discussion and Implications of Major Findings

This quantitative study is considered important because it offers a model for addressing organizational reform. This study tests the relationship among constructs found in the literature that are related to both student achievement and reform. Although many studies have addressed each construct separately, the researcher has yet to find a study addressing all of the constructs in relation to reform. Furthermore, the Reform Readiness Survey is unlike any other measure that determines organizational readiness for reform in that it addresses all major constructs in the model that can affect student achievement as well as reform: school culture, school climate, teacher efficacy, and collective efficacy.

A New Framework for Reform Readiness

The Framework for Reform Readiness, as shown in Figure 1, presents culture and climate as a triangle, reflecting Fiore's (2001) metaphor, because the data supports the strong relationship among the constructs. However, the constructs are seamlessly related. In other words, there is no distinct line that separates the two constructs. Although they are distinctly important, they overlap in the minds of practitioners. Therefore, the line visually separating the two is a dotted line, representing the fluidity of the constructs in practitioners' minds. Separation can be recognized due to the actions and behaviors related to climate, which stems from the beliefs and feelings related to the foundational culture. Though it may not be vital to an organization to distinguish every characteristic of an organization as a manifestation of culture or climate, leaders need to have knowledge of both culture and climate in relation to first- and second-order change. This will be discussed in a subsequent section.

The data analysis also reveals that collective efficacy plays a major role in the reform process and is more closely related to school climate and school culture than previously expected. Collective efficacy and teacher efficacy are not as strongly related as previously thought. Teacher efficacy is focused on self, much like locus of control. Collective efficacy addresses the whole organization or group. If a teacher implemented a reform only within his or her classroom, teacher efficacy would play a more substantial role. However, this model is more focused on organizational reform; therefore, school culture, school climate, and collective efficacy are more influential on the organizational effectiveness of the reform. Teacher efficacy is not quite as influential, although it does have a positive relationship with reform, which supports Berman's (1977) research that claims that teacher efficacy can impact teacher change.

Reform is at the center of the model, represented as a non-shape to demonstrate the complexity and problematic-nature of change. Because the RRS did not differentiate between first-order change and second-order change, these two types of change will not be discretely represented.

Overall, the model is a representation of previous literature and current empirical evidence that supports the relationships among the five constructs: school culture, school climate, teacher efficacy, collective efficacy, and reform.

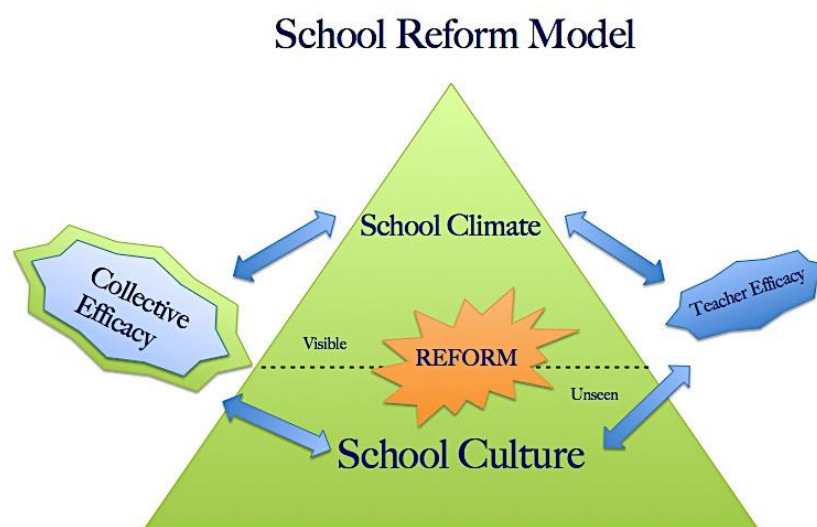


Figure 1. School Reform Model

Implications Related to Conceptual and Theoretical Concerns

The research conducted regarding school culture affirms several findings from other researchers, particularly concerning reform. The amount of research concerning school culture had increased exponentially over the last 50 years due to the strong link between school culture and school effectiveness (Van Houtte, 2005). In particular, school culture has been shown to affect student achievement (D'Alessandro & Sath, 1998; Stolp, 1994). Although this study does not address student achievement directly, it is found that school culture does indeed have a strong relationship with reform, which confirms research by Allen et al. (1998), Fullan (2007, 2009), and Wagner et al. (2012).

According to the correlations in this study, Shared Leadership, a subscale of the RSCEQ, is most strongly related to Collegial Leadership (OCI), and Change Leadership (RRS). These subscales are not only connected because of the leadership factor, but because culture is very strongly related to both climate and reform. Therefore, it can be noted that strong leadership, which is shared and collegial among faculty members, is indeed related to strength of culture. In the review of the literature, the researcher brought out several elements of culture among foundational research. The following studies were noted: Cavanaugh and Dellar (1997); Fyans, Jr. and Maehar (1990); Hongboontri and Keawkhong (2014); Hoy and Hoy (2003); and Olivier (2001). Only two of the studies, Cavanaugh and Dellar (1997) and Olivier (2001) list leadership as being an essential element of school culture. This study finds that leadership is indeed an element of school culture.

School culture is also highly correlated with collective efficacy (.720, .699, .728). In fact, of all the subscales that are correlated with collective efficacy, the strongest correlations occur with the subscales referring to school culture. This indicates that collective efficacy is strongly related to culture. The nature of the relationship was not assessed in this study.

Concerning the relationship between school culture and school climate, this study draws from research by Fiore (2001), Hoy and Hoy (2003), and Van Houtte (2005) who assert that school climate is a product of school culture. School culture is the foundation upon which school climate is manifested. However, this study asserts that, although school culture and climate are two separate constructs, they are conceptualized by teachers as being one in the same. Van Houtte (2005) asserts, "Climate researchers measure how organization members perceive the organizational climate, while culture researchers look for what members think and believe about themselves" (p. 75). However, when using Likert-type measures, researchers solicit respondents to assess their own perceptions about the topic. Therefore, it would be easy for teachers to perceive their schools to be very similar in school culture and school climate.

Teacher Professionalism, a subscale of the OCI, highly correlated with all subscales in the RSCEQ and the TEBS-C. Although it is apparent that school culture and school climate are closely related, an addition to the research on school climate would be that collective efficacy is highly correlated with school climate. In fact, all subscales of the OCI, with the exception of Institutional Vulnerability, are strongly correlated with collective efficacy. Therefore, collective efficacy is closely related to both school culture and climate. This corroborates research that states that collective efficacy is an important aspect of school culture and climate (Bandura, 1993, 1997; Berman, 1977; Dembo & Gibson, 1985; Tschannen-Moran et al., 1998; Ware & Kitsantas, 2007).

In reference to Bandura's (1997) work concerning collective efficacy, this study confirms that collective efficacy is a group attribute, not a compounding of individuals' efficacious beliefs. Collective efficacy does not have a strong relationship with teacher efficacy.

However, this study provides further insight into the collective efficacy construct. As stated earlier, collective efficacy has a strong relationship with school culture, school climate, and reform. The strongest relationship with collective efficacy is with school culture. Because of the relationship between school culture and school climate, it is no surprise that collective efficacy is related to both. Bandura (1997) explains that although collective efficacy is not an additive process relating to teacher efficacy, it does share the same sources for efficacy: mastery experiences, vicarious experiences, verbal persuasion, and psychological factors. Group members assess others' strengths and weaknesses when determining their perceptions concerning the efficacy of the group. This study asserts that when teachers are asked to measure their perceptions of culture and climate, they answer questions concerning collective efficacy much the same because they are measuring their perceptions of the group. This is also true of the Reform Readiness Survey. Teachers are asked to determine their perceptions of the group. One must remember, however, that although teachers are measuring perceptions of the whole faculty, the constructs previously mentioned are discrete.

Perhaps the most significant contribution to research concerning the five constructs in this study is that teacher efficacy does not have a strong relationship with reform. Hoy and Hoy (2003) define teacher efficacy as "a teacher's belief that he or she can reach even difficult students to help them learn" (p. 129). According to Tschannen-Moran et al.'s (1998) research, the four sources of efficacy are filtered through the cognitive process of the teaching task, which is related to the culture of the school. Furthermore, highly efficacious teachers persist to overcome difficulties in the classroom and are more likely to embrace new practices (Hoy & Hoy, 2003). These characteristics of efficacious teachers would seemingly impact reform. However, the relationship between teacher efficacy and reform is weak. Although efficacious teachers are more willing to incorporate new practices and support innovation, the strength of the reform is more related to whole-faculty efficacy, or collective efficacy.

One of the foundational elements of reform is culture. If the culture does not support the reform, it will not be sustainable. Allen et al. (1998) and Fullan (2007, 2009) assert that leaders must understand school culture when implementing reform. Reform, particularly second-order change, requires reculturing. This study supports the research concerning the strong relationship between culture and reform.

Another finding that affirms Fullan's (2001, 2005) research concerning change theory is the impact that leaders have on change. This study finds high correlations among subscales addressing change within several constructs, such as culture, climate, and reform. Leadership is an element that permeates almost every aspect of the school, in particular the culture and climate of the school. Although leaders have influence on individual teachers, the correlations among leadership subscales and teacher efficacy subscales were relatively low, especially in comparison with the other constructs in the study.

In addition to the findings concerning the impact of reform, this study finds that collective efficacy also has a strong relationship with reform. In particular, the researcher submits that collective efficacy is likely more impactful on the success of second-order reform rather than first-order reform. Just as second-order change requires reculturing of schools, second-order change can possibly be more successful with a strong sense of collective efficacy.

Lastly, this study augments research on reform by providing a reliable and valid measure that districts and states can use in order to determine organizational readiness for reform.

Implications for Practicing Educational Leaders

The following section provides implications for leaders at both school and district levels.

School leaders. As many school leaders know, reform itself is not the key to creating high-achieving schools. Furthermore, reforms that are not implemented correctly are usually not sustainable. Badly implemented reforms can cost districts inordinate amounts of time, money, and even personnel. However, research has demonstrated that school culture, school climate, teacher efficacy, and collective efficacy affect student achievement (Bandura, 1997; Cavanaugh & Dellar, 1997; Cohen, Fege, & Pickeral, 2009; MacNeil, Prater, & Busch, 2009; National School Climate Council, 2007; Peterson & Deal, 2009; Stolp, 1994; University-Community Partnerships, Michigan State University, 2004). Just as Fullan (1999) asserts the importance of theories of change and theories of education working together, this study calls for the integration of the following constructs by school leaders and policymakers when considering reform: school culture, school climate, teacher efficacy, and collective efficacy.

This study affirms the strong connection between reform and culture. Ideally, a leader should work to create a strong culture and a positive climate before implementing a second-order change. This is called reculturing. Unfortunately, though, districts and states typically intend to implement reform as soon as possible in order to see more timely results and to save money. Therefore, it is the school leader's responsibility to continually be cognizant of the current school culture and work toward making it stronger. The stronger the school culture is, the easier it will be to implement second-order changes.

School leaders must understand the differences between culture and climate as well as first order and second order change. Reforms that address climate changes are typically first-order changes are visual, incremental, and surface level. Although climate changes may seem insignificant, these first-order changes are extremely valuable to school leaders. First-order changes can be administrative directives to which faculty members must adhere, such as dressing professionally, arriving at school on time, teaching from bell-to-bell, and working collaboratively to plan lessons. First-order changes pave the way to bring about attitudes, traditions, norms and values that affect the overarching culture of the school.

Although having a strong school culture makes second-order change easier, the nature of second-order change will always require the reculturing of a school in order to reach sustainability. Second-order change requires new ways of thinking. It is often complex, problematic, and takes much time and effort to accomplish. If the faculty already emulates shared leadership, professional commitment, and collegial teaching and learning, then second-order change will likely be easier to initiate, implement, and sustain.

Collective efficacy also proved to be a powerful construct highly correlated with reform as well as culture and climate. Schools can develop a strong sense of collective efficacy and raise student achievement in the process (Bandura, 1993, 1997; Hoy & Hoy, 2003; Moolenaar, Slegers, & Daly, 2012). In low socioeconomic schools, student achievement is powerfully affected by teachers' decreasing collective efficacy (Bandura, 1997).

Leaders should familiarize themselves with the construct and the four sources of collective efficacy: mastery experiences, vicarious experiences, verbal persuasion, and psychological factors. School leaders can be a source of high efficacious beliefs among faculty members. For instance, mastery experiences are personal experiences of success that the faculty experiences. As the teachers see student success—social, behavior, or academics—the principal can have teachers report the successes to faculty members. As the whole faculty observes their own impact on student learning, the collective efficacy increases. Principals can use every whole-faculty directive or initiative as an opportunity to name the successes that are seen.

Vicarious experiences occur when the faculty observes the success or failure of another faculty when tackling a similar proposed task. Faculty members who are able to observe other schools and the successes they experience with the same programs, types of students, and resources, will experience an increase in collective efficacy. Principals, however, must take time to view the practices of other principals and collaborate with them.

Verbal persuasion can occur at the school level or the district level. Verbal persuasion is simply hearing others confirm the group's abilities or the high expectations of that person for the group. Principals can provide this to their own faculties. District leaders can affirm positive expectations to school faculties. However, the credibility of the persuader can affect the faculty's response to the message.

The last source of efficacy is a bit more difficult for a principal or district leaders to apply. Levels of arousal and how the arousal is cognitively interpreted can explain psychological factors. Hoy and Hoy (2003) explain that psychological arousals, such as anxiousness and worry, can lower efficacy while excitement or energy increase efficacy. Whole-faculty psychological factors may be manifested through the climate at the school. If student behaviors are hindering teachers from teaching, they may experience stress and frustration, which would lower the efficacious beliefs for the faculty.

Although teacher efficacy did not prove to be significantly related to reform, leaders should not forget the impact teacher efficacy has on an individual teacher's classroom achievement (Bandura, 1997; Berman, 1977; Dembo & Gibson, 1985; Goddard et al., 2000; Tschannen-Moran et al., 1998; Tschannen-Moran & Hoy, 2001; Ware & Kitsantas, 2007). Teacher efficacy has an even greater effect on achievement than student socioeconomic status (Bandura, 1993; Goddard et al., 2000). The sources of efficacy are the same, and leaders can raise or lower a teacher's efficacy through verbal persuasion. Leaders should observe teachers and give them constructive feedback. Principals can also give teachers the opportunity to observe one another, which may contribute to an increase in teacher efficacy through vicarious experiences.

Lastly, school leaders can use the results of the Reform Readiness Survey to determine the strengths and weaknesses of the school in terms of culture, climate, collective efficacy, teacher efficacy, and leadership. Looking at practices that enhance and hinder the culture and the collective efficacy of the school is one place to start.

District leaders. Several of the constructs in this study are used in reference to school-level reform. However, whole districts create a culture and climate that also affects reform. A strong district-wide culture is expected to have a positive impact on the schools and the teachers. Just as individual schools create vision statements and goals, districts should do the same and communicate those statements and goals to the schools and the community. If schools perceive the entire district negatively, the community will also perceive the district negatively. A strong culture and a positive climate throughout the district will better prepare schools for reform.

Collective efficacy is a powerful construct that districts can use to increase achievement and prepare for reform. District leaders should understand and use the four sources of efficacy in actions and conversations with principals, whole faculties, and the community. Reforms too often receive negative attention from the community from frustrated teachers. However, if the practitioners in the district believe that the district positively impacts student achievement and can continue to positively impact student achievement, the initial problems that accompany second-order change will be more easily resolved. However, communication by district leaders to schools and the community is key, which leads to the next point.

District leaders must continually reflect on their own actions before and during the initiation of reform. Strong, transformational leadership is essential to all stages of reform. This study finds that effective leadership is also essential to a strong culture and a positive climate.

Lastly, the Reform Readiness Survey can be used to determine the readiness of schools for reform. Too often districts use the lowest performing schools to test the success of a second-order changes because of the immediacy of the problem and the extra funding available from grants or Title I. However, because low performing schools often have large amounts of teacher turnover, morale issues, negative climates, and toxic cultures, reforms often fail before the district allows other schools to take part in the reform process. The RRS was designed to assist districts in determining which schools are ready for reform. District leaders can initiate the district-wide reform in stages, beginning with the schools that are ready for the reform. During the first stage of reform, schools in which the reform is not being implemented can prepare for the reform by working to strengthen the culture and the collective efficacy of faculty members. This also gives these schools more time to

put structures in place as well as observe the implementation of the reform in other schools. The next set of schools will implement the reform during the second stage and so forth.

Although the RRS was created to determine organizational readiness for reform, school leaders and district leaders could possibly use the measure to progress monitor the implementation of the reform in reference to the effects on school culture, school climate, teacher efficacy, collective efficacy, and change leadership.

Although reform itself is not the key to increasing student achievement, by bridging the educational theories that have proven to raise student achievement, such as school culture, climate, teacher efficacy, and collective efficacy, and change theories, school and district leaders will be able to use reform to create positive changes for the future generations.

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Appendix A

Sample Items in the Reform Readiness Survey*

	SD	D	SWD	SWA	A	SA
1. I believe I can implement changes in my classroom to increase student performance.	1	2	3	4	5	6
2. I am capable of implementing curricular changes due to reform efforts.	1	2	3	4	5	6
3. I believe I have the capability to implement reform.	1	2	3	4	5	6
4. I believe that I can positively impact learning while implementing mandates.	1	2	3	4	5	6
5. I believe that I am capable of successfully implementing new initiatives while teaching difficult students.	1	2	3	4	5	6
6. I am confident in my ability to manage difficult students during reform.	1	2	3	4	5	6
7. I am confident in my ability to teach what my students need to know despite policy changes.	1	2	3	4	5	6
8. As a member of my school staff, I believe I am vital in our efforts for school reform.	1	2	3	4	5	6
9. My successes in teaching contribute to my confidence in implementing reform.	1	2	3	4	5	6
10. I able to maintain my creativity while implementing mandates.	1	2	3	4	5	6

11. I am motivated to change my own classroom practices.	1	2	3	4	5	6
12. Teachers at my school are optimistic about state reform efforts.	1	2	3	4	5	6

Source: Stokes, E. W. & Olivier, D. F. (2016). *Reform Readiness Survey* (RRS)

**The entire RRS is comprised of 40 items. For use of the entire survey, please contact erin.stokes@rpsb.us.*

OUTSTANDING GRADUATE STUDENT RESEARCH PAPER AWARD

Leadership, Change Management, and Acculturation in the Merger of Two Institutions of Higher Education: A Case Study

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Abstract

Mergers and consolidations within the higher education sector are “relatively rare occurrences and each merger has a distinct set of circumstances, actors, and characteristics” (Etschmaier, 2010, p. 1). Institutional mergers and consolidations require well-planned and strategic organizational change and include an examination of organizational culture and the process of acculturation. While there has been research on various aspects of higher education mergers, there has been little on the process of integrating institutional cultures. Compounding the challenge is that the degree of assimilation among institutions is variable. This integration of cultures takes time to fully accomplish. Researchers have estimated varying time periods for full integration, as much as ten years or more in some cases. As institutions of higher education undergo reorganization, several components of change management must be addressed, looking particularly at culture as a critical element of the change process. The purpose of this case study is to examine why two institutions of higher education merged, the role of change management during a merger, conceptual models used in understanding reorganization, and the role that culture plays during a merger. The overarching research question directing this study was, *What roles do leadership, change management, and culture play in mergers between institutions of higher education?*

Keywords: acculturation, change process, organizational culture, and leadership

Introduction

Mergers and consolidations within the higher education sector are “relatively rare occurrences and each merger has a distinct set of circumstances, actors, and characteristics” (Etschmaier, 2010, p. 1). Researchers describe the merger process through a variety of models, characteristics, and steps. Martin and Samels (1994) noted that mergers are a response to growth and change in higher education referring to the potential as “mutual-growth strategy” (p. ix). They further defined an academic merger as “a creative opportunity to combine significant and powerful educational resources and academic cultures” (p. 5). According to Etschmaier (2010),

Some leaders in higher education in the U.S. today are speculating that there may be an increase in the number of mergers as colleges struggle with the increasing market pressures of small endowments, competition for the best students, an economic recession, and limited availability of financial aid. (p. 3)

Overview of the Study

In the current challenging environment, colleges and universities face a variety of pressures, most notably, lack of financial support. One response to these financial challenges is a merger of two or more institutions. Another term that is used synonymously is consolidation. These terms are used interchangeably in this research. State governing boards and higher education administrators face the difficult problem of how to successfully accomplish such mergers due to the complex issues involved. In examining the literature on institutions of higher education as they undergo reorganization thru merger, it is clear that research in this unique area of change management is limited. Through the research conducted, decision-making and leadership

exhibited during the stages of the merger and the role of culture will be examined. Finally, the components of the resulting culture will be evaluated.

Institutional mergers require well-planned and strategic organizational change (Ohman, 2011; Schein, 2010; Weber & Camerer, 2003). Part of that change includes an examination of organizational culture and the process of acculturation. Culture becomes increasingly important when mergers between institutions of higher education take place. While there has been research on various aspects of higher education mergers (strategic management, politics, and theory and practice) there has been little on the process of integrating institutional cultures.

Existing research supports the view that merging divergent cultures is a challenge (Buono & Bowditch, 1989; Hagberg Consulting Group, 2002; Harman 2002; Martin & Samels, 1994; Selingo, 1999). “Understanding different cultures and where and how to integrate them quickly is vital to the success of an acquisition or a merger” (Hagberg Consulting Group, 2002, p. 1). Devoge and Shiraki (2000) submitted that in mergers, the people factors were the most poorly handled and received less attention than financial and technical issues, although this should have been just as important as the others.

Compounding the challenge is that the degree of assimilation among institutions is variable (Buono & Bowditch, 1989; Millett, 1976; Pritchard & Williamson, 2008). This integration of cultures takes time to fully accomplish. Researchers have estimated varying time periods for full integration (Buono & Bowditch, 1989; Millett, 1976).

Purpose of the Study

Research in the area of change management in higher education, especially in regard to mergers, is limited. As mergers are becoming a viable response to the challenging environment in higher education, research into the processes and results of mergers is important. The overarching research question directing this study was, *What roles do leadership, change management, and culture play in mergers between institutions of higher education?*

The purpose of this study was to: (a) ascertain the reasons that prompted the merger of two institutions of higher education; (b) identify the characteristics of the change process and how the process influenced the response to change by the faculty, staff, and students of the merging institutions; (c) examine the role of the leaders in facilitating the merger; (d) determine the extent to which organizational culture played a part in the merger; and (e) identify the evolving organizational culture.

Research Questions and Research Propositions

Specifically, this research examined the consolidation of two universities through document review, campus exploration and participant interviews. Through the research conducted, decision-making and leadership exhibited during the stages of the merger were examined as well as the role that culture played in the merger and the evolving culture approximately one year post-consolidation. The following major research questions directed the research:

Research Question 1: What were the major reasons leading to the consolidation between State University and Middle State University?

Proposition: Economy of scale was the most predominant reason for the consolidation between the two universities.

Research Question 2: What were the characteristics of the change process and the impact on the re-organization of the institutions?

Proposition: Utilization of change models influenced the response to change by the faculty and staff of the merging institutions by following suggested steps in change.

Research Question 3: How did the leadership within each organization facilitate the change management process?

Proposition: Effective leadership served as a critical element in the merger of the two institutions.

Research Question 4: What role did organizational culture play during the merger of the institutions?

Proposition: Organization culture served as a significant factor in the merger of the two institutions.

Research Question 5: What was the nature of the evolving culture following the merger of the two institutions?

Proposition: The culture of the newly-merged State University was reflective of the culture of the dominant, pre-merger State University.

Methodological Overview

A qualitative approach was chosen as the researcher plans “to explore phenomena in their natural environment” (Rudestam & Newton, 2007, p. 32). Quantitative analysis cannot adequately identify the underlying beliefs and assumptions of the participants. Gay and Airasian (2000) agreed and defined qualitative research as “The collection of extensive data on many variables over an extended period of time, in a naturalistic setting, to order to gain insights not possible using other types of research” (p. 627). The purpose of qualitative research is to describe and understand a phenomenon through interviewing participants’ in their natural setting. Denzin and Lincoln (2011) suggested

Qualitative research is a situated activity that locates the observer in the world. Qualitative research consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations including field notes, interviews, conversations, photographs, recording and memos to the self. (p. 3)

Case Study approach. The case study approach was used for this single-case study, as it focuses on gaining an in-depth understanding of a particular event at a specific time. The case study method has been used quite often in the educational setting (Tesch, 1990).

Data Collection

State University, located in State A, was the setting for this study. State University and Middle State University were consolidated in January 2015 as part of a state-wide merger of twelve universities into six universities. The larger State University campus is home to ten of the thirteen colleges of the University. The smaller campus is home to the other three colleges. State University has an enrollment of over 33,000 traditional and non-traditional students, 55% of whom are female. Approximately one-third of the consolidated University’s students are minorities.

Data collection took place on the two State University campuses during the month of June, 2016. Over an approximately one-week period, the researcher interviewed participants, observed the campus culture, reviewed and reflected on taped interviews, and reconnected for follow-up. Data were also collected through telephone interviews following the visit to the campuses as well as through e-mail communications with individuals who did not want to speak in person. The researcher obtained permission to recruit from the university’s office of research.

The main sources of data examined were archival records, documents, and semi-structured interviews. The archival records and documents examined included:

Documents Analyzed for the Case Study:

1. Documents from the University System of State A relating to each individual consolidation
2. Press releases from the University System of State A relating to the consolidation efforts of the state as well as the specific press releases referencing the State University and Middle State University consolidation.
3. Documents from the university’s website
4. Documents from the university’s consolidation Website
5. SACSCOC Substantive Change Document
6. Articles in major newspapers in the state

7. YouTube recordings of press conferences and discussion forums related to the consolidation

Documents were utilized in the study in multiple ways. The documents were examined before the interviews to help identify key interview participants as well as during interviews when needed to ask appropriate follow-up questions. Following the interviews, the documents were used to corroborate and triangulate the interview data adding to the credibility of the survey.

Gatekeepers

Creswell (2014) describes the importance of using gatekeepers to assist in gaining access to the research and the archival sites. The Vice President for Student Affairs and the Program Director for Online Education and Limited Term Associate Professor of Physical Education at State University assisted the researcher in identifying individuals from both State University and Middle State University who would provide the most understanding of the phenomena under study.

Sampling

A total of 14 participants were interviewed for this study. Six participants were interviewed from the State University campus and six from the (former) Middle State Campus. One of the participants was a May 2016 graduate whose course work was completed on the (former) Middle State Campus. The final participant was a former top administrator at Middle State University who left to take another position within a few months following the announcement of the consolidation.

The number of participants interviewed and the sampling technique used is supported by the literature. There are a number of sampling techniques available in qualitative research. The researcher used purposeful sampling where “The goal is to select cases that are likely to be “information-rich” with respect to the purposes of the study (Gall, Gall, & Borg, 2007, p. 178). Yilmaz (2013) stated “The main aim of purposeful sampling is to select and study a small number of people or unique cases whose study produces a wealth of detailed information and an in-depth understanding of the people, programs, cases, and situations studied” (p. 313). Therefore, criterion for selecting participants in the study were that they experienced the phenomenon under study, in this case, the merger of two higher education institutions, which includes the role of leadership, the change management process and acculturation (Creswell, 2013). These individuals provided an understanding of the research problem, and because they experienced the central phenomenon of this study, they provided insights about the process and at what point the new culture, if any, emerged.

The determination of the size of the sample is equally important. According to Creswell (2013):

The size question is an equally important decision to sampling strategy in the data collection process.

One general guideline for sample size in qualitative research is not only to study a few sites or individuals but also to collect extensive detail about each site or individual studied. (p. 157)

In considering the number of participants, the concept of saturation must be considered. According to Strauss and Corbin (1998),

This means until (a) no new or relevant data seem to be emerging regarding a category, (b) the category is well developed in terms of its properties and dimensions demonstrating variation, and (c) the relationship among categories are well established and validated. (p. 212)

The Interview Protocol

Interviews were conducted using a *semi-structured approach* where a series of structured questions were asked with subsequent probing with open-ended questions to obtain additional information *Face-to-face interviews* were conducted at times convenient for the participants. The participants chose the location for the interviews. Each interview lasted between 30 and 60 minutes. During the on-campus interviews field notes were taken to record interesting non-verbal clues that otherwise would not be captured.

The content of the interviews was transcribed by the researcher. One of the benefits of self-transcription is that the researcher became more familiar with the data and could write memos or comments as the interview was transcribed (Merriam & Tisdell, 2015). The participants were sent copies of the transcribed interviews for their review. This is referred to as member-checking. Following transcription of the interviews, clarification or follow-up questions were asked through e-mail.

The interview protocol included questions based on the major constructs of change process, leadership and culture (formulated into the research questions) and tailored to the participant being interviewed. The questions were designed specifically to illicit answers relating to the evolving landscape before, during and following the merger.

Data Analysis

The researcher examined the data carefully and thoughtfully to segment or classify (code) the information into categories. Coding of data can be developed using predetermined categories and fitting the information into those categories or categories can be created as the information is reviewed. The researcher identified categories based on the literature review to assist in the initial analysis; as a thorough review of documents and interviews progressed, key concepts were identified. From these key concepts, themes were reassembled, and major findings presented.

Strengthening the credibility of the study. There are several concepts used to assess the credibility of findings in a qualitative study including triangulation, member-checking, reflexivity, and transferability. These were used by the researcher in this case study.

Triangulation. The three elements of triangulation that the researcher used included interviews, examination of documents related to the merger, and observations on the campuses being studied.

Member-checking. An additional method for strengthening credibility is to assure the accuracy of the findings by member-checking. After the audio-tapes of the interviews were transcribed, the reports were returned to participants for their review and approval.

Reflexivity. According to Malterud (2001), reflexivity refers to the concept that “A researcher’s background position will affect what they [sic] choose to investigate, the angle of investigation, the methods judged most adequate for this pursuit, the findings considered most appropriate, and the framing and communication of conclusions” (p. 483-484).

As part of the reflections on this study the researcher identified her own values and how her personal feelings might affect the study; this assisted in maintaining researcher neutrality through the process. Personal experiences with the relocation of the Health Information Management Department from the Ray P. Authement College of Sciences to the College of Nursing and Allied Health Professions provided the researcher with a greater understanding of the role that culture plays in times of revolutionary change.

Transferability. One of the criteria for evaluating qualitative research is the transferability of the findings. The use of thick descriptions or rich, detailed descriptions of the case allows the reader to make a decision as to whether or not the conclusions are transferable (Geertz, 1973). Based on the expected rich, thick descriptions of the participants, the reviewed documents and the setting itself, the researcher suggests that the findings will be transferable to other institutions (four and two-year) anticipating or undergoing a merger under similar circumstances.

Ethics

Participants in the study were advised verbally and in writing about the nature of this research and ascertained that their participation was voluntary.

Consolidation of State University and Middle State University

In November of 2013, two universities were slated for consolidation. State University (a pseudonym) and Middle State University (a pseudonym) would consolidate to form a new institution, maintaining the name of State University. The current president of State University would continue as president of the new State University. During the previous four consolidations, a new name for each new institution was derived based on a combination of the names of the two consolidating universities. For this consolidation, the Board of Regents decided on the new name and presidency prior to the announcement of consolidation.

The focus of this case study is the fifth consolidation in the state. State University first offered classes in September of 1966 primarily as a liberal arts college. Professional schools of business, education, and nursing were later added, and in 1976, State achieved senior-college status, followed by university status in 1996. It offered almost twenty graduate degree programs in professional concentrations such as nursing, business, information, systems, conflict management, education, and professional writing (Scott, 2016).

Middle State University, located approximately ten miles from State University, was founded sixty-five years ago (under a different name and as a branch of a nearby four-year college) during the post-World War II economic boom. Engineers were needed with practical, hands-on experience, and Middle would offer an engineering technology program to meet that demand. It opened in the fall of 1948, offering classes in an abandoned Naval Air Station barracks with an initial class of 115 men and one woman, all Caucasian. It was one of the first technical institutes in the nation to offer the Bachelor of Engineering Technology degree. By 1980, Middle was feeling more and more like a stepchild of its parent school and appealed to the Board of Regents for its designation as a separate university. A new president was recruited, and a new name was granted. Subsequently, the college added traditional engineering degrees, a master's in software engineering, and a number of bachelor degree programs, including architecture and computing services. Students at Middle tended to be male, older, working, and taking night classes only. Despite the geographic proximity of the two universities, there was very little contact between students and faculties (Scott, 2016).

Consolidation process. In November of 2013, the University System of State A appointed a State University – Middle State University Consolidation Implementation Committee (CIC). The co-chairs of the CIC were the current presidents of the two consolidating institutions and each university appointed thirteen representatives to the committee.

The charge given to the CIC was to oversee the consolidation of the universities in keeping with a timeline to allow SACSCOC approval by December of 2014 and subsequent Board of Regents approval in January of 2015 (Consolidation Implementation Committee, 2013, December 4, p. 1). Full integration would start in the fall semester of 2015.

Consolidation Implementation Committee – First steps. The first task given to the CIC was to develop the new institution's mission and vision statements and organizational chart (CIC, 2013, December 4, p. 1). The second major task was to identify and staff Operational Work Groups (OWGs) which would examine and submit recommendations on over 700 separate items identified by the Board of Regents relating to the consolidation (CIC, 2013, December 4, p. 2). OWGs were organized into 22 functional areas each of which was headed by an Area Coordinator who was a member of the CIC.

The New U

Almost 2 years after the announcement of the consolidation was made the New U, State University, achieved full consolidation. August of 2015 marked the initial semester of full consolidation. The new university combined the best from two of the state's most respected institutions of higher education. This new, comprehensive university offers students a broad spectrum of quality academics, a growing campus life, and a wide variety of athletic offerings.

Major Findings and Conclusions

The major findings resulting from the interviews, document review and archival transcript review for each research question will be discussed and conclusions submitted. An extensive literature review supported these conclusions.

Major finding one. The participants acknowledged that while the leadership exhibited by higher administration was strong, there were issues related to communication and senior leadership selection that created difficulties in moving the consolidation forward.

There were initially two levels of leadership; the first from the Chancellor of the Board of Regents who made the decision to consolidate and the second from the two presidents as the consolidation moved forward. Both State University and Middle State University had well-respected, well-liked presidents, who were leading universities in times of growth in enrollment. While this was certainly very positive and important as the consolidation moved forward, it also caused discord as the Middle State President lost her job. Unfortunately, the first communication about the consolidation set a negative tone for the entire process. Much of the disharmony was due to the surprise announcement of the consolidation and the mechanism for choosing the name of the university and the president.

In the early days following the announcement there were several public appearances by both presidents. Both exuded an air of cooperation, collaboration, and optimism for the future. This was particularly true of the Middle State president who knew that she would not play a significant role in the future of the university. In her appearance on the day of the announcement she demonstrated grace, professionalism, and a positive attitude. Her sense of humor in the face of difficult questions was captivating.

Unfortunately, the “strong and loyal staff complement” did create difficulties as this loyalty was tied directly to the president of Middle State. Her departure in the spring of 2014 left some employees with a sense of isolation.

There were several means of communication used throughout the consolidation process: town hall meetings, forum discussions, press conferences, informal meetings with key players, and operational working groups (OWGs). The consolidation website offered a great deal of information on the leadership of the consolidation, Consolidation Implementation Committee (CIC) and Expanded Consolidation Implementation Committee (ECIC) membership, minutes from all meetings, and updates from the OWGs. It also included the SACSCOC prospectus on the consolidation and the 2015-2016 Strategic Plan.

The participants did feel that the new President, Dr. Dawn, offered good communication throughout the process. However, there was evidence in meeting minutes of the CIC and ECIC that members felt they were being left out of the decision process. On two separate occasions, Dr. Dawn reiterated that in many cases the final decisions were his alone. The president, himself, suggested that he should have had more town meetings and that communication could have been handled better.

One of the major findings was the dissatisfaction with the selection of the senior leadership in the new university. At the very beginning of the consolidation process, both presidents indicated that there were no pre-ordained decisions on who the senior leadership would be (with the exception of the President, of course). As decisions were made, all senior leadership positions were given to State employees with the exception of three open positions for which there were national searches.

In terms of equality of resources, in general, there were positive findings. There was little evidence of one campus receiving an unequal share of support or services. In fact, a great deal of money was spent in the first year of consolidation on the former Middle campus to upgrade technology and campus facilities.

Major finding two. The participants did not observe the use of any specific change management model.

In summarizing the change process that was used in the consolidation, Lewin’s (1947) Three-Step theory of unfreezing, moving, and freezing at a new level (refreezing) will provide one framework for discussion. Step 1 or unfreezing refers to letting go of old patterns or removing restraining forces on employees (Kritsonis, 2005; Schein, 1996). The unfreezing stage was not fully accomplished. Because the merger was mandated, individuals involved were not given the opportunity to accept that change was needed.

Lewin (1947) labeled Step 2 as moving or change as this is the stage where individuals move to the new phase of behavior and they look at the organization from a new, fresh, perspective (Kritsonis, 2005). Communication, positive feedback, recognition and encouragement are needed to reassure the workers about how the change will benefit them (Kritsonis, 2005; Stichler, 2011). Many of the participants have moved to the second stage, in large part, due to the communication efforts by leadership. State University leaders employed several communication techniques to keep employees abreast of the progress of the consolidation. Although several mechanisms were used to reassure employees about how the change would benefit them, there are still individuals who see no value in the change.

Finally, the refreezing step, Step 3, is where there is stabilization and sustainability of the new norm. State University is generally entering this third step although most participants agreed that there is more work to do and more time is needed to fully stabilize the new university.

Major finding three. While presented as a consolidation, many of the participants considered the change mandated by the Board of Regents as a *hostile-takeover*.

One participant mentioned that in the business sector, mergers generally tend to be *take-overs* and the vanquished team just leaves. SC was very critical of the manner in which the decisions were made

Then there could have been some input, and people would have thought about it. But just to say, “It’s a done deal, and in a year from now you’re together, and Dr. Beamish, you don’t have a job any more after that year.” That seemed a little harsh to me as a way to do something like that without really thinking of all the ramifications of it. As a result, and this is just probably human nature, since State is now so much bigger than Middle State, it’s pretty hard for people at Middle State not to see it as an absorption more than a partnership. (Cheshier, 2014, p. 36)

Jack, an administrator at State University, surmised that

It was an indication of dominance – it was not necessarily portrayed that way – it was a merger of equals and that type of thing but we were four times the size, more comprehensive, already at the comprehensive level and we wanted the resultant school to be comprehensive.

The consensus among faculty, staff, students and alumni of Middle State University was that they were being treated as stepchildren, they were being absorbed, the school brand was being dissolved, and that they were somehow inferior to State University.

Major finding four. The disparate cultures between the two institutions impeded the progress towards consolidation and acculturation.

Bergquist (1992) identified four interrelated cultures that he observed in higher education institutions in the US. Institutions may include elements of more than one culture but there is usually a predominant one. The *collegial* culture is reflective of the long history of collegiality in academic institutions. It is the most widely identified; it encourages diverse perspectives, autonomy over one’s own work, and leadership based on scholarship and research.

A culture that finds meaning through organization, evaluation, and implementation of work and which values fiscal responsibility and effective management is deemed a *managerial* culture. Educational outcomes in the managerial culture are based on specific criteria for teaching; in the managerial culture, faculty use institutionally prepared instructional materials. Instructional design and instruction are separate processes. According to Bergquist and Pawlak (2008), “The key words of the managerial cultures seem to be efficiency and competence” (p. 62). Leaders who are fiscally responsible and value personnel management are most successful in managerial cultures.

The culture of State University, prior to consolidation, appeared to be a combination of collegial and managerial cultures. State’s culture valued many of the components of the collegial culture but also appreciated fiscal responsibility and effective management of the managerial culture. The study allowed the researcher to identify Middle State University with Bergquist and Pawlak’s (2008) *developmental* culture which appreciates self-expression, openness and autonomy. There is more emphasis in creation of new programs, diversity of faculty in terms of gender and race, and encouragement for “cognitive, affective, and behavioral maturation

among all students, faculty, administration, and staff” (Bergquist & Pawlak, 2008, p. 73). The developmental culture encourages deliberation and open communication but suffers from lack of coherence and organization.

The cultures of the two universities were quite different and this played an important role in the consolidation efforts. Several of the participants attributed some of the cultural differences to the very nature of the disciplines on each campus. Middle State was a STEM university while State was more of a liberal arts university. Therefore, the disparity of gender distribution on each campus was significant. Several participants also referred to the nature of the students typically found in the STEM disciplines. One participant referred to Middle State as the nerd-school. Another mentioned that there were differences in the basic elements of daily life, for example, how people treated each other. Middle State was much more laid-back and close-knit than State.

Major finding five. Approximately one year post-consolidation, the culture of the new State University is still, very much, evolving.

At the time of this research, State University had just completed its first academic year (2015-2016) under full consolidation; understandably it is very much an evolving culture. As some participants suggested, it may be several years before full acculturation is observed.

Major finding six. The consolidation between State University and Middle State University was predicated by the policy of the state Board of Regents (BOR) to consolidate higher education institutions to reduce funds and redirect those funds to research, faculty development, and instructional support.

Approximately two years prior to the State/Middle State consolidation, the state BOR initiated a state-wide consolidation effort to reduce the number of universities and to redirect the funds recovered by these consolidations to research, faculty development and instructional support. This consolidation, too, was predicated on economic savings.

Implications for Theory

The findings of this case study confirm the value of strong leadership in times of revolutionary change as well as the need for a defined model for change management. As Burke (2014) stated “Leadership is a highly sought-after and highly-valued commodity” (p. 1), and this case study demonstrated that leadership and communication are vital during the consolidation process. The conclusions reached by the researcher supported the need for adopting and utilizing a change management model in order to move the group to achieve the common goals of the new university. Missteps along the way may have been avoided had a more defined process been followed. Recognizing the differences in culture between the two universities was one of the most controversial issues in the consolidation. Corporate culture is one of the most important components of change and can contribute to the success or failure of the change. The case study reinforced this assertion.

Implications for Practice and Leadership

With increasing costs of higher education and decreasing support from state and private funding, colleges and universities look to alternative means to maintain economic viability while providing quality education. Mergers and consolidations offer one means of combatting rising costs while increasing diversity, enhancing academic quality and reputation, and reducing external threats from competitors.

This case study could be a model for other institutions undergoing mandated or voluntary mergers. Although this study focused on a single consolidation between two state universities, the study’s findings may have implications for legislators, board of regents, board of directors, and senior leadership as they investigate mergers or consolidations.

Implications for Further Research

Numerous additional opportunities for research in change management, leadership, and culture during mergers and consolidations in institutions of higher education currently exist. Findings of this study show the importance of utilizing an established change management model, demonstrating strong transformational leadership skills, and understanding the impact that individual cultures have on the consolidation process.

Because this case study only examined a single consolidation between two universities, additional research could include a larger participant base. For example, several other consolidations took place prior to this consolidation and more are planned for the future. The status of these consolidations could be studied.

This case study looked at two, four-year state institutions of disparate size. Mergers in higher education are also taking place in private and public settings and in four-year and two-year venues. Examining the process of consolidation in these different sites would provide additional information on the process and success or failures of mergers and consolidations. In addition, this case study examined a consolidation between a STEM school and a liberal arts college. The different cultures traditionally seen in these types of school certainly played a part in the consolidation process; consolidations between like disciplines may yield different results.

While this case study looked at the consolidation from the perspective of students, faculty, staff, and alumni, student information was only gathered from videos. Further studies could involve the students more fully into the study. Frankly, any unique perspective of a merger in universities and colleges could be examined and provide valuable information to the higher education community. For example, decision-making by higher administration, feasibility studies prior to merger, financial savings post-major, changes in institutional rankings, and academic and research changes post-merger could all offer interesting research opportunities.

This study conducted in 2016 can be used as a baseline against which future longitudinal research at State University can be compared. A valuable research study for the future would involve assessing the culture of State University at the 5 and 10 year marks. At the five-year mark, most of the students will have only known the new State University so the expectation would be that there would be a more stabilized culture. It would also be interesting to examine alumni perceptions after five years. At the ten-year mark, as the literature suggests, the final, new end state would be in place.

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Mathematics Self-Efficacy and Content Knowledge: Exploring the Connection for Elementary Preservice Teachers

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Abstract

Data on content knowledge and self-efficacy beliefs were collected from 41 elementary preservice teachers enrolled in a mathematics methods course. Correlational analysis was used to determine whether a relationship existed between elementary preservice teachers' mathematics content knowledge (MCK) and two factors representing mathematics teacher self-efficacy, Mathematics Teaching Outcome Expectancy (MTOE) and Personal Mathematics Teaching Efficacy (PMTE; Enochs, Smith, & Huinker, 2000). MCK was measured using the Praxis® Elementary Education: Multiple Subjects: Mathematics. No statistically significant relationship was found between preservice teachers' MTOE and MCK, nor between PMTE and MCK. These findings are similar to those of Newton, Leonard, Evans, and Eastburn (2012) whose results suggested elementary preservice teachers' prior experiences with learning mathematics content may become less important in terms of efficacy judgments as they gain positive experiences with teaching mathematics. Implications for practice and future research will be discussed.

Keywords: elementary mathematics, content knowledge, teacher self-efficacy, preservice teachers

Introduction

For years, teachers' content knowledge has been recognized as an important and necessary instructional attribute (Shulman, 1986), and since passage of the No Child Left Behind Act (NCLB; 2002), the definition of a highly-qualified teacher has been linked to content knowledge in federal legislation. Not surprisingly, there has been a substantial increase in the number of published research articles on preservice teachers' mathematical content knowledge (MCK) over the past few decades (Thanheiser, et al., 2014). Similarly, teachers' self-efficacy beliefs, how capable teachers believe themselves to be to deliver instruction to students, have been a focus of research since the late 1970's and has been on the increase in recent years (Armor et al., 1976; Dembo & Gibson, 1985; Klassen, Tze, Betts, & Gordon, 2011; Tschannen-Moran & Woolfolk Hoy, 2001; Zee & Koomen, 2016). Past research provides evidence that teachers who report more positive self-efficacy beliefs exhibit various desirable teaching behaviors including: delivering process-oriented instruction, establishing appropriate learning goals for students and revising those goals frequently based on student performance, and employing effective teaching strategies including differentiated instruction to support inclusion of students with diverse learning needs (Allinder, 1995; Martin, Sass, & Schmitt, 2012; Thoonen, Slegers, Oort, Peetsma, & Geijsel, 2011; Wertheim & Leyser, 2002; Weshah, 2012). Furthermore, teachers' self-efficacy beliefs have been linked, in some cases, to students' academic achievement, motivation, and self-efficacy (Midgley, Feldlaufer, & Eccles, 1989; Ross, 1992; Thoonen, Slegers, Peetsma, & Oort, 2011).

When considering research specific to teaching mathematics, there is some evidence that teachers with high self-efficacy are more successful in developing students' proficiency with mathematical skills than teachers with low self-efficacy (Allinder, 1995; Hines, 2008; Midgley et al., 1989; Throndsen & Thurno, 2013). Unfortunately, many preservice elementary teachers participating in mathematics teaching methods courses enter with low self-efficacy beliefs regarding teaching mathematics and inadequate understanding of mathematical concepts (Ball, 1990; Bursal & Paznokas, 2006; Huinker & Madison, 1997; Ma, 1999). Some evidence suggests that lower levels of teaching efficacy in mathematics may be due, in part, to inadequate preparation in mathematics and low mathematical understanding and performance (Bates, Latham, & Kim,

2011; Phelps, 2010; Thomson, DiFrancesca, Carrier, & Lee, 2017). While content knowledge and self-efficacy are important indicators of instructional performance, they are also attributes that can be developed in preservice teachers (Charalambous et al., 2008; Cohrssen & Tayler, 2016; Palmer, 2006). Therefore, the possible relationship between preservice teachers' MCK and their self-efficacy for teaching mathematics is of particular importance to teacher educators. The purpose of the current study was to investigate the relationship between elementary preservice teachers' MCK and two factors representing mathematics teacher self-efficacy, Mathematics Teaching Outcome Expectancy (MTOE) and Personal Mathematics Teaching Efficacy (PMTE; Enochs, et al., 2000).

Methodology

Participants

This study was conducted at a large research university situated in an urban city in the southeastern United States. The university is classified by the Southern Association of Colleges and Schools as a Level VI institution and by the Carnegie Foundation for the Advancement of Teaching as Doctoral/Research Intensive University. The College of Education where the participants were enrolled consists of approximately 1,750 undergraduate and graduate students, and the participants' program (K-6 Teacher Education) is the largest in the college.

Participants were 41 preservice teachers seeking a Class B teaching certificate in both Elementary Education and Collaborative Teaching (K-6). Participant demographics were typical of this program; all participants were female, seniors and predominantly Caucasian (32 Caucasian and 9 African American).

Instruments

Instruments included the Praxis® Elementary Education: Multiple Subjects: Mathematics subtest (Test Code 5033) and the Mathematics Teaching Efficacy Beliefs Instrument (Enochs et al., 2000). The Elementary Education: Multiple Subjects test is designed to assess whether a candidate has the broad knowledge and competencies necessary to be licensed as a beginning teacher at the elementary school level (Educational Testing Services, 2012), and is part of the licensing procedure in many states. The Mathematics subtest contains 40 selected-response questions (26 Numbers, Operations, and Algebraic Thinking items; 14 Geometry, Measurement, Data, and Interpretation) typically covered in a bachelor's degree program in elementary education. A minimum score of 157 on the Mathematics subtest is required before participants begin their student teaching semester.

The second instrument was the Mathematics Teaching Efficacy Beliefs Instrument (MTEBI). The MTEBI was created by Enochs, et al. (2000) who modified the Science Teaching Efficacy Belief Instrument (STEBI; Enochs & Riggs, 1990) to create an instrument that could measure the mathematics teaching efficacy beliefs of preservice teachers. Both the STEBI and the MTEBI rely on Gibson and Dembo's (1984) Teacher Efficacy Scale (TES) which operationally defines teacher self-efficacy as a construct made up of two factors: personal teaching efficacy and general teaching efficacy.

Personal teaching efficacy: "belief that one has the skills and abilities to bring about student learning." (p. 573)

General teaching efficacy: "belief that any teacher's ability to bring about change is significantly limited by factors external to the teacher, such as the home environment, family background, and parental influences." (p. 574)

Gibson and Dembo (1984) linked personal teaching efficacy with Bandura's (1977) conception of self-efficacy beliefs: an individual's beliefs about his or her own ability to perform specific behaviors. The general teaching efficacy factor was linked with Bandura's (1986) conception of outcome expectancy, defined as an individual's judgment of the likely consequences of his or her actions. Based on their interpretation of

Bandura's (1977) theory of social learning, Gibson and Dembo (1984) posited that "... teachers who believe student learning can be influenced by effective teaching (outcomes expectancy beliefs) and who also have confidence in their own teaching abilities (self-efficacy beliefs) should persist longer, provide a greater academic focus in the classroom, and exhibit different types of feedback than teachers who have lower expectations concerning their ability to influence student learning (p. 570)."

However, Gibson and Dembo's (1984) two-factor teacher self-efficacy construct has been called into question based on both psychometric and theoretical difficulties (Henson, 2002; Tschannen-Moran & Woolfolk Hoy, 2001). The most notable critics may have been Tschannen-Moran and Woolfolk Hoy (2001) who developed the Teacher Sense of Efficacy Scale (TSES) to measure teacher self-efficacy in a way they claimed more closely represented Bandura's (1986, 1997, 2001) theoretical framework. The TSES was developed to measure teacher self-efficacy across three factors (Instruction, Classroom Management, and Student Engagement) using items restricted to teachers' beliefs about their own capabilities and did not include items regarding the potential impact that teachers in general are able to have on students despite external challenges (outcome expectancy). Tschannen-Moran and Woolfolk Hoy (2001) also pointed to low internal consistency reliability for the general teaching efficacy factor of Gibson and Dembo's (1984) scale, along with issues of item cross-loading found by other researchers (e.g., Coladarsi & Fink, 1995; Guskey & Passaro, 1994; Henson, 2002; Woolfolk & Hoy, 1990).

However, while the three-factor structure of Tschannen-Moran and Woolfolk Hoy's (2001) TSES has produced strong evidence as a sound measure for inservice teachers, data gathered from preservice teachers has not supported the proposed three factor structure (Duffin, French, & Patrick, 2012; Fives & Buehl, 2009; Tschannen-Moran & Woolfolk Hoy, 2001). Therefore, for the current study, which is focused specifically on the mathematics self-efficacy beliefs of preservice teachers, the MTEBI was employed. The MTEBI was developed and validated specifically for preservice teachers and remains a widely used instrument for measuring the efficacy beliefs of preservice teachers (Bates, Latham, & Kim, 2011; Bursal & Paznokas, 2006; Moody & DuCloux, 2015; Swars, Daane, & Giesen, 2006; Thompson et al., 2017).

The 21-item MTEBI uses a five-point, forced-choice response Likert-type scale ranging from "Strongly Agree" to "Strongly Disagree" to obtain individual's perceptions of mathematics teaching efficacy beliefs on each of the two subscales--Personal Mathematics Teaching Efficacy (PMTE) and Mathematics Teaching Outcome Expectancy (MTOE). A response of "Strongly Agree" indicates the highest level (5) of perceived efficacy whereas "Strongly Disagree" indicates the lowest level (1). The PMTE subscale consists of 13 items (2, 3, 5, 6, 8, 11, 15, 16, 17, 18, 19, 20, and 21) intended to elicit the preservice teachers' level of confidence in their own skills and abilities to teach mathematics, and included varied statements, such as "I understand mathematics concepts well enough to be effective in teaching elementary mathematics." and "I will find it difficult to use manipulatives to explain to students why mathematics works." The MTOE subscale consists of 8 items (1, 4, 7, 9, 10, 12, 13, and 14) intended to elicit the preservice teachers' beliefs regarding whether students' mathematics learning can be impacted by effective teaching, and included varied statements, such as "When a student does better than usual in mathematics, it is often because the teacher exerted a little extra effort." and "The inadequacy of a student's mathematics background can be overcome by good teaching." Eight negatively worded items (3, 6, 8, 15, 17, 18, 19 and 21) across both subscales were reverse coded so that scores corresponded with positively worded items.

Results

Data Collection and Analysis

The MTEBI was disseminated to a convenience sample of 41 preservice teachers enrolled in an elementary mathematics methods course during the last week of their semester, immediately prior to their student teaching semester. Missing data from seven participants resulted in listwise deletion so that only 34

responses were included in the correlational analysis. Visual analysis of histograms revealed no violation of univariate normality for any of the three variables (MCK, MTOE, and PMTE).

Two Cronbach's alpha coefficients were computed to assess the internal consistency reliability of items in each subscale (MTOE and PMTE). The alpha coefficient for items in the MTOE subscale was .679, and the alpha coefficient for items in the PMTE subscale was .765. The internal consistency reliability for items in the PMTE subscale was adequate (above .70; Tay & Jebb, 2017), while the internal consistency reliability for items in the MTOE subscale was nearly adequate.

The responses for the MTOE subscale ($M = 3.6581$, $SD = .42$) indicated that the preservice teachers agreed fairly strongly that students' mathematics learning can be impacted by effective teaching. Similarly, the responses for the PMTE subscale ($M = 3.94$, $SD = .39$), indicated that the preservice teachers strongly agreed that they had the skills and abilities to teach mathematics. The mean for the Praxis mathematics content knowledge score was 162.71, which was above the minimum score (157) required for the participants to show adequate MCK to begin their student teaching semester.

Bivariate correlations were computed to examine 1) the relationship between elementary preservice teachers' MCK and MTOE and 2) the relationship between elementary preservice teachers' MCK and PMTE. The relationship between the two self-efficacy factors (MTOE and PMTE) was also examined through correlational analysis. The bivariate correlations between MCK and both self-efficacy measures (MTOE and PMTE) were not statistically significant (results displayed in Table 1). Therefore, no evidence was obtained to suggest a relationship between preservice teachers' MCK and their self-efficacy beliefs. Additionally, the bivariate correlation between the two self-efficacy measures (MTOE and PMTE) was not statistically significant (results displayed in Table 1), indicating that preservice teachers with greater confidence in their own abilities to teach mathematics did not have greater confidence in the ability of effective teaching to impact students' mathematics learning.

Table 1

Bivariate Correlations

	Mathematics Content Knowledge (MCK)	Mathematics Teaching Outcome Expectancy (MTOE)	Personal Mathematics Teaching Efficacy (PMTE)
Mathematics Content Knowledge (MCK)	1	0.140	-0.034
Mathematics Teaching Outcome Expectancy (MTOE)		1	0.201
Personal Mathematics Teaching Efficacy (PMTE)			1

Note. * $p < .05$.

Discussion

Elementary preservice teachers in the current study conveyed high levels of efficacy regarding both their mathematics teaching abilities (PMTE) and the outcome expectancy (MTOE) for their students in mathematics. However, PMTE and MTOE were not significantly correlated indicating that preservice teachers that reported greater confidence in their own abilities did not necessarily also report greater outcome expectancy for their students. These results are similar to those of Briley (2012) who also found high levels of mathematics teaching efficacy and outcome expectancy among the 95 preservice teachers he surveyed using the MTEBI, but no significant correlation between the preservice teachers' confidence to teach math and their outcome expectancy for their students. While Bursal and Paznokas (2006) also found generally high levels of mathematics teaching efficacy and outcome expectancy among the 65 preservice teachers they surveyed using the MTEBI, about half of the preservice teachers who reported higher levels of math anxiety felt that they would not be able to teach mathematics effectively to their future students.

No statistically significant relationship was found between MCK and either of the self-efficacy subscales (MTOE and PMTE). These findings are similar to those of Newton et al. (2012) who found only a moderate positive relationship between content knowledge and personal teaching efficacy and no relationship between content knowledge and outcome expectancy. Newton et al. suggested that elementary preservice teachers' prior experiences with learning mathematics content may become less important in terms of efficacy judgments as they gain positive experiences with teaching mathematics. Therefore, it is recommended that future research follow preservice teachers into their student teaching placements to examine whether and how their mathematics teaching efficacy changes as they gain procedural and conceptual knowledge of the mathematics content taught in the elementary grades.

Implications for Research and Practice

Results of this study suggest that elementary preservice teachers' beliefs regarding their own ability to provide mathematics instruction to their students are not impacted by the amount of knowledge the preservice teachers have of mathematical content. Newton et al. (2012) pointed to preservice teachers' actual experiences instructing students in mathematics as a potentially more relevant source for increased self-efficacy beliefs. This assertion is in line with Bandura's (1997) social cognitive theory which identifies mastery experiences as the most impactful of the four sources of self-efficacy beliefs: mastery experiences, persuasion by a significant other, vicarious experiences, and physiological arousal. Bong and Skaalvik (2003) explained that it is not simply one's skill or ability level that determines self-efficacy, but rather what one can do with whatever skill or ability level one possesses that largely determines self-efficacy. Given the results of the current study, it would seem that more attention should be given to what preservice teachers "can do" with the mathematical content knowledge they have, rather than focusing on the mathematical content knowledge itself. Future research may consider elementary preservice teachers' pedagogical content knowledge for teaching mathematics, or elementary preservice teachers' ability to engage students in mathematics learning and manage student motivation. Based on the primary role actual experiences play in the development of self-efficacy, greater attention should be paid to the field-placement experiences that preservice teachers engage in, particularly in terms of mathematics instruction. Are preservice teachers being provided adequate opportunities to deliver mathematics instruction to students? Are preservice teachers being adequately supported so that they are set up for success in those mathematics teaching opportunities? Finally, are preservice teachers developing the necessary tools for student engagement and classroom management so that they can deliver mathematics instruction in the manner intended, and not have their efforts overwhelmed by the social and behavioral dynamics of a classroom or individual students? Mathematics self-efficacy, not only through effective coursework focused on reformed mathematics instruction and reflection (Briley, 2012), but also through structured and well-supported mathematics field experiences (Utley, Moseley, & Bryant, 2005).

Limitations

Use of a convenience sample of elementary preservice teachers from one university enrolled in a single semester was a limitation that reduced the generalizability of the findings. Another notable limitation is the small sample size, which possibly contributed to the non-significant findings in the current study. For future studies, it is recommended to include a larger number of participants from various institutions and/or over the course of several semesters.

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Defying the Odds: One Mother's Experience Raising a Twice-Exceptional Learner

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Abstract

Twice-exceptional learners benefit personally and academically from supportive individuals. Additionally, those learners with a parent well-versed in understanding the needs of one's child and capable of advocating on his or her behalf are especially fortunate. Despite the desire to assist one's child and support his or her academic journey, many parents are left baffled and overwhelmed with challenges and expectations. Experts suggest parenting a gifted child can, at times, be challenging (Webb, Gore, Amend, & DeVries, 2007). Consequently, it can be assumed parenting a child with multiple exceptionalities would also offer unique challenges. Thus, it is important to support the parent of such a child, for, in supporting the parent, one is supporting the child. This qualitative case study considers the lived experience of one mother currently raising a twice-exceptional, gifted and dyslexic sophomore, struggling with ADHD and anxiety. Collected data highlights the thoughts and feelings this mother has toward parenting such a child. It is hoped that such an account can help parents in similar circumstances as well as stakeholders better appreciate and understand such children and the struggles parents raising such a child may encounter.

Keywords: twice-exceptional; gifted children; parenting gifted children; parenting anxiety

Introduction

Students benefit personally and academically from supportive individuals, especially those with a parent well-versed in understanding the needs of one's child and capable of advocating on his or her behalf. However, despite the desire to assist and support one's child in his or her academic journey, parents may feel baffled and overwhelmed with choices and circumstances. Indeed, although rewarding, all parenting can be difficult, but parenting a gifted child has its own unique set of challenges, and parenting a child with multiple exceptionalities may be especially challenging. It is important for educators to support parents of such children, for, in supporting the parent, one is supporting the child.

The Gifted Learner

The U.S. Department of Education (1993) considers gifted learners as those possessing "outstanding talent" who "perform or show the potential for performing at remarkably high levels of accomplishment when compared with others of their age, experience, and environment" (p. 26). Although gifted learners vary in their (among other things) tastes, motivation, abilities, temperament, and desires, there are defining traits found within this special population that could create emotional sensitivities for some. One defining characteristic, asynchronous development, parallels the child's IQ and can create an awkward feeling of being "out-of-sync" with oneself and others (Silverman, 2013, p. 44). Overexcitabilities (Dabrowski, 1964, 1966) may be recognized and heightened sensitivities may be exacerbated. Some gifted learners may experience fear (Tippey & Burnham, 2009), anxiety (Harrison & Van Haneghan, 2011; Lamont, 2012), and depression (Jackson, 1998; Webb, 2008; Webb et al., 2006).

There are misunderstandings regarding the ways in which a gifted learner lives and learns. Commonly-believed myths (Webb, Gore, Amend, & DeVries, 2007), may intensify unrealistic expectations and create additional stress on such learners. Perfectionism (Mofield & Peters, 2015; Perrone-McGovern, Simon-Dack, Beduna, Williams, & Esche, 2015; Silverman, 1999) and underachievement (Blaas, 2014; Delisle, 2009; Ritchotte, Rubenstein, & Murray, 2015; Rubenstein, Siegle, Reis, McCoach, & Burton, 2012), for example,

may result from such internal and external expectations, and this may trigger additional frustrations. Additionally, some gifted learners choose to conceal or deny their gifts and talents in order to be approved and accepted by others (Webb et al., 2007, p. 172).

Parenting the Gifted Learner

The exceptional needs and characteristics of gifted learners may concern some parents. At times, parents may feel inadequately equipped in their parental role (Delisle, 2001) and feel unsupported and isolated from those who can understand and empathize (Webb et al., 2007). For example, understanding asynchronous development as well as understanding how to help one's gifted learner cope can be particularly challenging for some parents because this population differs so vastly, and one positive integration or solution will not accommodate all. For this reason, proper resources and information, as well as the social support from interpersonal relations, becomes especially important for parents' self-efficacy. However, parents of gifted learners may have difficulty finding such support, and, as Webb et al. (2007) expect, few have opportunities to discuss their perceptions, feelings, and concerns with others.

Delisle (2001) suggests that, despite the excitement in raising such a gifted and talented child, parents may feel a sense of guilt. This guilt may coincide with feelings of inadequacy. Consequently, it would seem that such feelings might create obstacles affecting intrapersonal relations as well as stifling positive self-efficacy, hindering appropriate goal setting and productive steps toward advocacy, and obstructing successful family dynamics. Identified myths (Webb et al., 2007) about the gifted learner may only add to the already fueled emotions and insecurities of the parent. Therefore, the joy in having a gifted and talented child may sometimes be dwarfed by unsettling emotions and uncertainties.

The Twice-Exceptional Learner

Twice-exceptional learners are recognized as G/T learners who have disabilities or other problematic issues and disorders (Berninger & Abbott, 2013; Reis, Baum, & Burke, 2014). The National Education Association (2006) recognizes several types of twice-exceptional disabilities that include physical, sensory, or learning disabilities. These include, but are not limited to: Asperger Syndrome, emotional and/or behavioral disorders, and ADHD (p. 6). As is considered "a milder form of autism" that is difficult to recognize because of "subtle hidden disabilities" within individuals that seem "normal" and "intelligent" (Powell, 2016, p. 7). Lyon, Shaywitz, and Shaywitz (2003) consider reading disabilities as separate from learning disabilities and claim that dyslexia "affect[s] at least 80 percent of the LD population" (p. 2). Dyslexics are characterized as having:

Difficulties with accurate and/or fluent word recognition and by poor spelling and decoding abilities.

These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction.

Secondary consequences may include problems in reading comprehension and reduced reading experience that can impede growth of vocabulary and background knowledge. (p. 2)

Reis, Baum, and Burke (2014) assert that there are problems diagnosing students with disabilities and, for this reason, advise "multidisciplinary teams familiar with both giftedness and disabilities" to collaborate on a twice-exceptional diagnosis (p. 224). Consequently, since such learning disabilities and "neurobiological problems" can be destructive to one's "academic and social/emotional functioning" and success (Kobot, 2003, p. 42), it is important for stakeholders (e.g., parents, teachers, counselors) to address such needs in order to support these exceptional learners.

Current Study

This qualitative case study considered the narrative of Andrea¹, a mother currently raising a twice-exceptional (i.e., gifted/dyslexic with ADHD) sophomore. Andrea's daughter, Christine, is currently enrolled in a public high school and taking Advanced Placement (AP) classes. Andrea, a willing participant through

snowball sampling, was selected for her role in raising a highly-gifted (146 IQ), twice-exceptional learner. As a dyslexic herself, Andrea understood the difficult struggles and experiences one faces with such a disability. However, this understanding seemed to strengthen her perspective and appreciation for how Christine was able to cope and excel despite her disability. The researcher felt Andrea's parenting experiences would be invaluable for all stakeholders hoping to better understand and support twice-exceptional learners and their families. Thus, the purpose of the study was to gather data that could add informational value to better understand the uniquely defining experiences, perceptions, and challenges that mothers raising gifted, twice-exceptional learners might encounter. From the collected data, the researcher hoped to identify and consider circumstances that could explain individual thought patterns resulting from one's parental role in raising such a child and in dealing with perceived societal expectations and opinions of both the self and child.

Method

The qualitative in design study intentionally explored twice-exceptionalities and unique maternal experiences as it related to such exceptionalities in order to illustrate discovered elements in narrative form. Based on thoughtful, introspective communications, the approach highlights meaningful lived experiences (Creswell & Poth, 2018), in this case for the mother. As personal truths are revealed in thoughts, feelings, and perceptions that emerge during personal, shared communications between the researcher and the mother, the process in gathering data is worthwhile. For the purpose of this study, the researcher chose a case study design where one semi-structured approximately 1 hour 15 minute FaceTime interview was the primary mode of communication, providing a more intimate look at a personal narrative that would be considered individually and, through planned future research, collectively. An informed consent document explained the nature of the study and the participant was assured that all identifying information would be changed in the transcription process and the voice-recording would be immediately destroyed afterwards. Once informed consent was granted, the researcher encouraged the participant to share her personal account and interpret her own experiences. During the interview the researcher asked the following open-ended questions:

1. Tell me about what sets your daughter apart from her peers.
2. Tell me about what pleases/excites you the most (even if you can't voice it to others) regarding the gifts/talents and/or future possibilities for your daughter.
3. Tell me about a really bad day where your daughter was misunderstood by others.
4. Describe a time where your daughter was treated unfairly or where there was discomfort or resistance (e.g. jealousy, frustration) from others (e.g. classmates, teachers, coaches).
5. Explain your concerns (for both you and your daughter) resulting from such experiences.
6. Consider the educational resources, intellectual assistance, and logical direction you provide your daughter. Are you satisfied with your choices and parental role? Please explain.
7. Consider the emotional support you provide your daughter. Describe a day where you were pleased/dissatisfied with the emotional support you provided.
8. What makes advocating for your daughter and her rights and educational opportunities difficult?
9. What is it like to be with other mothers who don't have G/T children? What might you wish was different?
10. What might others who have never raised a G/T child think of your role as a parent to a G/T child? In general, do you think these opinions are correct and justified? Please elaborate.
11. Describe a/another time when the comments (or lack of comments) and actions by another adult (possibly a mother to a non-G/T child) caused tension and discomfort for you.
12. What challenges in raising a G/T child might others who have never raised such a child not understand? How might their image of you as a mother to a G/T child be erroneous?
13. Tell me about a time you withheld information about your daughter – even when other mothers were sharing positive news or stories regarding their own child and his/her accomplishments. Why might this have happened?

14. Tell me about additional ways in which you might have adapted/adjusted your communications with others regarding your G/T child.
15. Describe the community in which you live (e.g., urban vs. rural). Explain the benefits/hindrances of living in such a community as it relates to parenting a G/T child(ren).
16. Having had time to reflect upon your experiences in raising a G/T child, tell me about any enlightening thoughts or new discoveries regarding these experiences. Has your opinion/attitude shifted in any way?

The interview dialogue allowed the researcher to delve deeper into the participant's experiences and take a more analytical look at her narrative. After the interview, the participant was given a copy of the single-spaced 27-page transcript via email for approval, with the option to edit and provide commentary if needed.

It was believed that sample size was a limitation as well as limitations that could occur if the mother chose to end the session early or if there was resistance and withheld information or if the mother could not articulate her thoughts, feelings, and perspectives adequately. However, this participant shared openly throughout the interview although she struggled to recall concrete examples to some questions. One interview was adequate for this particular study since it enabled the researcher to understand thoughts and feelings the participant may have toward parenting a gifted, twice-exceptional learner. It also enabled the researcher to recognize possible perceptions toward societal opinions, expectations, and acceptance of both mother and child. This is one case in a larger study (Hidalgo, 2017) where participant narratives illustrated three overarching themes that highlighted social and emotional components as well as varied educational concerns and challenges: (1) Emotional Responses, (2) Parent Protective Factors, and (3) Misunderstanding of Mother.

The same procedures were followed in this case study, running parallel to a larger dissertation study (Hidalgo 2017). Andrea was not a participant for the original larger study; however, since her case had a twice-exceptional component, the researcher felt her case would be an interesting and valid addition. Thus, with the intention to further research and study the lived experiences of parents raising highly gifted children as well as those with additional exceptionalities, the researcher used the same analysis tools and followed the same procedures already established and validated in the larger study (Hidalgo, 2017).

Credibility for this study was obtained through member check (i.e., returned transcript with participant approval) as well as through telephone conferences between the investigator and another experienced investigator who served as a peer-reviewer. These telephone conferences were to recognize any researcher impartiality of data as well as to discuss findings, consider coded themes, and contemplate analysis (Creswell & Poth, 2018). The reviewer verified that the categories and themes were accurate. Any questions that the reviewer had were thoroughly discussed and remedied. Investigator and reviewer conclusions matched, and the reviewer verified that conclusions were valid.

Data Analysis

An analysis and review of the data continued during and after the transcription process. The transcript was read entirely on multiple occasions, key ideas were noted, and annotations were made in the margins. Demographics (e.g., age, marital status, number of G/T and non-G/T children living at home) and analytic memos where thoughts during the interview were documented were also considered. For example, the researcher considered the flexibility of Andrea's time and recognized a need for further research around parents with less flexibility of time. After an initial and generalized review, similar themes and codes were recognized to parallel a larger study (Hidalgo, 2017); however, in this particular case, the code of Dyslexia and Learning Disability (LD) was added. Other codes were identified, classified, and interpreted, and from these codes themes became more easily recognized. A table was made to visibly present each code, subtheme, and theme. The provided table illustrates the three overarching themes that highlighted social and emotional components as well as varied educational concerns and challenges.

Table 1

Codes, Subthemes, and Themes

<u>Codes</u>	<u>Subthemes</u>	<u>Themes</u>
Child's Gifts & Talents Child's Accomplishments Child's Future Opportunities	Appreciation	Emotional Responses
Fear of Bragging Downplayed or Withheld Information Societal Interactions	Discomfort	
Frustration with Child Frustration with Educators or District Advocating for Educational Rights & Opportunities Parenting Challenges Parenting Self-Efficacy Guilt & Remorse	Anxiety	
Social Interactions Masked Intelligence Work Ethic & Educational Experience Emotional Needs Negative Self Talk Dyslexia and LD	Concern for Child	Parent Protective Factors
Child's Personality & Ability Asynchronous Development	Misunderstanding of Child	
Mother's Decisions Mother's Challenges Parental Role Influence on Child's IQ & Academic Strengths	Misunderstanding of Mother	Misunderstanding of Mother

An initial summary attempting to identify challenges and emotional complexities as described by the parent informant was then created. The researcher used a categorical aggregation analysis where “a collection of instances” were found in order to see developing “issue-relevant meanings” (Creswell & Poth, 2018, p. 206). Patterns were then discovered and naturalistic generalizations followed from the data analysis. Afterwards, an analyzed narrative was formed highlighting themes and subthemes found within the participant narrative.

Results and Discussion

Andrea is a Caucasian, middle-class, work-from-home seamstress from a rural “oil field town” of about 13,000 residents. The community supports one elementary school, one middle school, and one high school. Andrea believes the resident children are close because they “go to school together their whole lives.” Andrea is raising a gifted, twice-exceptional sophomore who was diagnosed with dyslexia and ADHD at the age of seven. At that time, when Andrea was attempting to understand the reason behind Christine’s classroom “meltdowns,”

she sought the help of a doctor who would later refer her to a child psychiatrist. It was this psychiatrist who tested for and identified Christine's 146 IQ and recognized the source of the panic attacks – anxiety. The psychiatrist also attributed some of the problem to ADHD and, for this reason, he chose not to medically treat Christine for anxiety at that time. He did suggest, however, that Andrea put Christine on ADHD medication “to calm the noises” and “help her focus.” He believed she would eventually “grow out of it.” However, the anxiety forcefully returned in middle school, and it was then that she was also given medication for the anxiety. Andrea believes this approach has been successful and now as a sophomore, Christine is “doing fine.”

Andrea felt the child psychiatrist was a mentor to some extent, helping her better understand her daughter and her emotional needs. She valued the suggested tools he provided for helping Christine cope with her anxiety, and having the paperwork from a credible source gave Andrea confidence to strongly advocate for her daughter's educational opportunities. In elementary school, however, Christine was denied gifted enrichment services because her district would not grant services for both dyslexia *and* giftedness. Thus, Christine did not receive gifted services until her seventh grade year. Andrea later admitted: “I wish then I would have forced them to take her into the gifted and talented program because she tested into it.” However, she accepted the district's policy because “at the time [Christine] was so behind on reading that I was more focused on [getting her to read and write].” The researcher thought there may have been some regret and remorse when Andrea disclosed: “We probably should have home-schooled her instead of putting her in public school.”

Regardless, Andrea tried to make the most of those elementary years. She claimed: “I read *everything* I could get my hands on about dyslexia and about how the brain works and about how they think.” She felt that in order to teach Christine, she needed to teach herself through available literature. Even now when other parents ask her to share her success story, Andrea does not hesitate to tell them about what she did to help her daughter and about, for instance, the “*thousands* of flash cards” she made to accommodate “picture thinkers.” Andrea's animated enthusiasm in recounting how she helped her daughter during those early years seemed to highlight positive self-efficacy for her parenting role. More specifically, Andrea credits the lengthy sessions “spent outside of school” where she attempted to build skills and spark confidence within her daughter as a large “reason Christine is as successful as she is.” Consequently, Andrea prides herself on the time and effort she devoted to helping her daughter read, and she proudly recalled: “Once it clicked, she flew.” The researcher recognized her efforts at home, but she also credited Andrea for her research and advocacy at school, as well, and it was obvious that the educational professionals at her daughter's schools were also impressed:

Once we got the dyslexia diagnosis and we went in for what they call a 504 meeting... they had never had a mother come in with a 504 handbook printed out... I [had] read the 504 handbook cover to cover... [and] when I went in for the meeting, they said they never had a mom come in *this* prepared.

And the only thing I know is that in order to help her be prepared is for *me* to be prepared. And so I did that.

Andrea was prepared to advocate for Christine in parent-teacher communications either orally or in writing. She remembered “mak[ing] a point to [say], ‘Put the dyslexia on the back burner. I want you to listen to her and realize how smart she is. And I'm not bragging... I want you to listen to her and I want you to help her.’”

Themes

Three overarching themes that paralleled a larger study (Hidalgo, 2017) were presented in the data. The first theme, Emotional Responses, yielded three subthemes: (1) Appreciation, (2) Discomfort, and (3) Anxiety. The second theme, Parent Protective Factors, yielded two subthemes: (1) Concern for Child and (2) Misunderstanding of Child. An additional code was added to the Concern for Child subtheme: Dyslexia and Learning Disability (LD). The third and final theme was Misunderstanding of Mother.

Appreciation. Andrea revealed much appreciation for Christine's gifts and talents, accomplishments, and future opportunities, despite her dyslexia and learning disability. In fact, Andrea might have felt that Christine's disability strengthened her character, for she asserted there would be no future limitations for her

daughter; she proudly said: “The sky’s the limit with her.” One of the traits Andrea felt especially appreciative of was Christine’s drive and determination. She understood, for instance, that Christine’s effort to make Banner Roll all year was to be applauded since, as a dyslexic with ADHD, she had to “[work] twice as hard to get there.” The fact that Christine rallied behind other dyslexic students and encouraged them to do their best in a support group she formed was praised by her mother. According to Andrea, during these monthly meetings, Christine’s testimony is inspiration for others who hope to have the drive and determination Christine has shown in her academic success. Andrea might think those students see what she sees in her daughter, and Andrea elaborated on the fundamental traits that helped Christine find success:

When she doesn’t know what it is, she finds out what it is... when she is on task, she doesn’t quit until she gets the answer and once she knows it, she doesn’t forget... plus it’s being dyslexic [and] the fact that she’s able to do this with they say a pretty *profound* diagnosis of dyslexia and still be ranked in the top 10% of her class right now... we weren’t sure if she’d accomplish it, but she has by sheer *force of will* that she was *not* going to be put in special classes. She was going to be like a regular kid and she *forced* herself to learn how to read... if she didn’t have dyslexia, where would she be? You know, if she didn’t have that block, where would she be?

Such drive and resulting success highlights the appreciation Andrea feels not just for her daughter’s intelligence, gifts, and talents but also for her willpower. Andrea respected and valued Christine’s steer determination not to be victimized and limited by dyslexia and ADHD but, instead, to have resolve to succeed.

Discomfort. It was apparent that Andrea was cognizant of the reactions of others when she shared information about Christine, and she wished others would understand that “when I talk about some of the stuff that Christine does that I’m not bragging.” She seemed to feel that most people did not want “to hear about the one kid who’s perfect.” Consequently, Andrea admits:

I catch myself. If I brag about Christine, I brag about her to my best friend who has a kid just like her. I brag about her to my mom and to my family and to my husband. Because if I said that to some of these other mothers, then I’m not doing the right thing... I’m bragging on her... I would like it for people to understand that I’m not talking about her being smart again, I’m just proud of her... I’m proud of what she’s done. How many kids can come up with the stuff she’s coming up with?

This discomfort, as recognized in a fear of bragging, one identified code, has caused Andrea to withhold information, a second code, in the past. The researcher recognized that Andrea felt fortunate to have a friend with a gifted child a few years older than Christine. Together, the women help each other “smooth over rough edges” and “bounce ideas off [of one another].” However, with other mothers Andrea tends to withhold information about the accomplishments of her daughter. She remembered several instances where other mothers were bragging on their child’s grade or project – even when Christine’s grade or project was better – where she chose to either minimize her story or keep completely mum about it. In fact, Andrea admitted to learning early on that this was necessary for her to avoid discomfort. She shared: “We started dumbing down a lot of conversations with others because... you put yourself in another social area and... I had an older [non-gifted] child and saw where some other parents had issues with it. I kind of was able to learn from them what *not* to do myself.” Another interesting parental action to note was that Andrea often shared information about Christine’s dyslexia, and the researcher pondered whether this was to help detract from the gifted label and her accomplishments as a gifted learner. It seemed that Andrea could have possibly used such information unconsciously as permission to brag, for Andrea remembered saying, “She made all As *and* she’s dyslexic. What a great thing for her to pull off!” to other parents regardless of their reaction and she thought “I probably throw the dyslexia thing in there to dumb her down a little bit even though it’s not but to make her seem more normal.” Withholding or adjusting communications did not ease Andrea’s discomfort when she witnessed other people treat her daughter unfairly or disrespectfully.

Concern for child. Andrea further disclosed that she is intensely sensitive to the way others negatively treated Christine, especially in those elementary years when it “was the hardest.” She admitted that, during those years, “[Christine’s] friends made fun of her for being pulled out [of the classroom] for her dyslexia [special education class],” Andrea further admitted:

It would break my heart when the kids would just walk away from her and then she would come to me sad... It breaks my heart that she's grown up kinda lonely... kinda by herself. It's a shame that you're this smart and you have such a hard time socializing with the other kids. And the ones you *can* get to socialize with you are so much older, and then it's the balancing of the age difference.

Same-age peers were not the only ones to treat Christine poorly. Andrea vividly remembered adults (e.g., teachers, parents of her friends) brushing her off when she would attempt to share information. In the beginning, Andrea tried advocating for her daughter by voicing her concerns regarding Christine's ill treatment; however, she found that when she did, "I would push *those* parents away, so it got to the point where I would tell her I heard her and... move on."

Now, Andrea's "concern is [Christine] ostracizing herself" and "setting herself apart to the point where she doesn't have any friends because they just don't get her." She is concerned that Christine might "[expect] more out of these friends than they have the ability to give because they're not on the same level as her and she's trying to drag them up with her and they're not going to get there." Andrea understands her daughter's social and emotional needs and desires, and Christine seemingly feels comfortable sharing her honest feelings openly at home with her mother. Andrea claims there are, in fact, "a lot of tears" when she recounts happenings. She further elaborates:

She'll be explaining something that happened and she'll end up crying and then she gets frustrated with herself because she's crying... She *hates* being two different people. You know, at school she has to kind of dumb herself down and when she comes home, she's allowed to talk however she wants to talk and, you know, she gets frustrated with that side of it.

To help, Andrea encourages Christine to "have [her] filter on" because, she explains, this helps her "think about what she [is] saying... and make sure it [is] socially correct before she [says] it." Although Andrea did not know of the term *asynchronous development* before the interview, she did understand that there was indeed a gap between Christine's cognitive and emotional levels and she commented often on the anxiety created from such a gap.

This gap and the resulting anxiety affected, according to her concerned mother, Christine's social skills and made it difficult for her to avoid "social awkwardness." She remembered a recent occurrence where Christine's friend did not make the cheer team and instead of showing more empathy, Christine commented unknowingly in such a way that her friend felt slighted:

Christine made the comment, 'Oh well, better luck next year.' And it came across as a back-handed compliment, and... she didn't realize that what she said came across that way and she was like, 'Well, I was just trying to tell her that she has a chance next year.' And I was, 'Yes, but the way you *said* it, came across as just a slap in the face... I told her she needed to spin it properly and if you give a short and simple answer, most people want a little bit more flip and puff added in to the conversation... it took a lot of apologizing on her part – which in her brain she felt that it wasn't necessary – to explain to her friend that she didn't mean it to be that way.

Andrea continues to try to make her daughter aware of and help her understand how her comments and actions come across to others, but it does not minimize the often hurt feelings that occur from such scenarios – like the time a friend commented on Christine's comparison of a dance move to a geometry shape. Although that particular event was not necessarily as hurtful as some, it proved that Christine, to varying degrees, has to deal with daily occurrences where she is noticeably different and her friends do, in fact, comment on it. In the classroom, Christine has had several occurrences where the frustrated teacher reacted to something Christine said or did, and it concerned Andrea that the teachers did not better understand Christine's intention or the point she was trying to make. Such reactions by others make Andrea hope that "when she gets to college... she'll find that other friend on the same intelligence level that she can talk to" because Andrea realizes she will not be there to help Christine grapple with the discomfort felt in social settings.

Misunderstanding of child. Part of this sensitivity and the resulting frustration is in knowing how misunderstood her daughter is to same-age peers and adults. Andrea said that even family members have a difficult time understanding when so often "she's like a little adult" one minute and then in another minute,

she's playing with her American dolls. Regardless, misunderstandings can often make it difficult for Christine who "has a hard time connecting with people of her same age."

In the classroom, Christine has had a teacher who believed "because she was dyslexic, she was spoiled" and who believed since she was dyslexic, she couldn't know certain things. Christine has tried to defend her knowledge in the classroom with teachers who were disbelieving of some of the things Christine tried to share, and as a result Andrea asserted: "I don't want anybody to think she's a bad kid because it seems like the smart kids... get thought of as rude or get thought of as blunt."

Oftentimes, Andrea feels that people misunderstand her daughter's intense emotions, and she feels that she often has to explain how the two (i.e., intelligence and emotions) are connected:

I get a lot of... 'Christine cries a lot... What in the world does her being smart have to do with her emotions?'... I've already dumbed it down to where I don't even use the right words anymore... her intelligence level is up here [*moves her hand just below her chin*] and her emotional level is down here [*moves her hand just above her stomach*], they don't meet.... A lot of the tears are not necessarily that she's upset and crying. It's anxiety and it's the way it comes out in her.

Andrea realized misunderstandings will inevitably and naturally occur, especially since her daughter is twice-exceptional. However, dealing with the anxiety and frustration for both mother and daughter can be challenging. When Christine whole-heartedly began a support group for dyslexic students like her, Andrea admitted: "It was her way to reach out and help other kids with a learning disability... to show them how they can do this... It was a neat thing she started but when she started talking about it on the high school campus, she was [thought to be] bragging and she had to quit talking about it." Like mother like daughter, Andrea and Christine learned quickly that even things done in kindness could be misinterpreted and criticized.

Anxiety and frustration. Although Andrea felt parents may never be completely pleased with their parenting choices, she did seem to have positive self-efficacy – despite her challenges – in her parental role. She admitted to regrets of the past like the intolerance she had for Christine's idiosyncrasies, especially in the beginning, when "I've let her down." However, the majority of her anxiety and frustration seemed to result from external sources. She elaborates on some of the frustrating challenges she has had to endure:

Getting the counselors at school to understand or even getting her teachers to understand that she's an above-board thinker. That she doesn't think at the same level as everyone else in the class. I mean, I have had knock-down-drag-outs last year with her English teacher... and he was not happy and informing me that at her age she should be fighting her own battles and not have to have a mother fighting her battles for her.

It would seem parents of gifted children experience such frustrations to varying degrees, but –because Christine is twice-exceptional – Andrea has to deal with additional stresses:

We have the double whammy where we have the 504 plan for dyslexia in her file and they automatically shove her to the side... I mean, they have to sign a piece of paper saying that they know what's in her file, that they've read it, and that they understand it. And it's a federal offense if they don't read it, and they *still* just sign it and throw it to the side and they don't dig in a little deeper to realize that she's *highly* intelligent and she's highly highly knowledgeable on her own and they just push her to the side. It's a fight to jump over the 504 plan and have them realize that she can go above this and to not push her into a corner. She's right here in front of you.

Andrea has had to stay on top of the situation and request accommodations for Christine when, for example, a teacher did not "understand that writing her spelling words out five times was busy work for Christine." In this particular situation, the teacher agreed (after about six weeks of persuading by Andrea) that if she took a picture of the words Christine had written in clay, it would be an acceptable replacement for written work. Andrea has continued to take such experiences in stride and consistently advocate on her daughter's behalf, shedding light to educators and others on the struggles of a dyslexic yet highly intelligent learner.

Andrea wished that others would better understand her struggles, however, and that of her daughter. For example, she felt others did not understand Christine's academic "hunger that's almost impossible to feed" and how bored she is in school. This anxiety and frustration may stem from feeling misunderstood herself in her

parenting role. Additionally, it may stem from irritability for those (e.g., educators especially) playing a significant role in her daughter's academic journey and self-esteem who take little time or interest in an attempt to better understand Christine's character, social and emotional needs, or academic plans and desires.

Misunderstanding of mother. It would seem that Andrea's parental role and decisions were both criticized and misunderstood in society. Andrea admitted to being called "overprotective" and a "Helicopter Parent" at times. She has also had people tell her "to just let [Christine] be a *kid*" as criticism in recognizing Christine's social awkwardness. She elaborates that since Christine "doesn't fit into that little box that all the other kids do," others do not seem to understand her challenges. She felt that these same people who say Christine should spend more time with same-age peers do not consider "when she hangs out with other kids, she gets ostracized, so she goes to her room and reads." Teachers have also misunderstood her intentions when she has advocated her both educational opportunities and in speaking on her daughter's behalf in teacher-student conflicts. Overall, Andrea has learned to just move on unbothered by the opinions of others.

Conclusion

The narrative illustrated in this study offers a glimpse at the complexities and challenges, despite appreciation and joy, that parents may experience while raising a twice-exceptional learner. Christine was like many highly-gifted learners in her asynchrony and emotionally-heightened intensities, and this affected her vulnerability to anxiety as seen in her panic attacks and "meltdowns". In Andrea's case, early detection of her daughter's disability and emotional distress compelled her to seek professional help, and the psychiatrist was able to give Andrea the resources and support needed to support her child. This professional support also enhanced her parental confidence and desire to advocate for Christine.

Andrea's experiences seemed to spur an innate recognition of misunderstandings of both mother and child; such misunderstandings could be a result of commonly-believed myths (Webb, et al., 2007) concerning the gifted learner. The sensed misunderstandings caused concern for Christine and affected Andrea personally in her parenting role. This may have been cause for her choosing (either consciously or unconsciously) to downplay Christine's abilities and achievements at times.

Andrea's challenges in parenting a twice-exceptional learner was apparent. Fortunately, in Andrea's case, there were individuals who served as confidants and mentors, supporting her decisions and giving her encouragement when needed. The support, especially, of her husband and a close and understanding friend, providing both solace and a sounding board for articulating her position and preparing her for action, encouraged Andrea further in her quest to support and advocate for her daughter, and this unquestionably helped boost her confidence and determination. Consequently, even though the rural community in which she lives has few gifted and twice-exceptional learners, both mother and child were able to thrive, recognizing and feeling comfort from the support of both individuals and research literature even in their unusual and isolated position.

Arguably, Andrea's work-from-home seamstress position granted her flexibility in time. However, it was her internal drive to help Christine find academic success. As a dyslexic herself, she may have been especially motivated in helping her daughter through the struggles that she was all too familiar with from her own personal childhood narrative. Andrea had much appreciation for her daughter's gifts and talents, but it was Christine's drive that her mother seemed to appreciate most. Although dyslexia and learning disabilities can hinder one's academic success as well as one's emotional development, Andrea's narrative shows that some defy the odds and confidently reach personal success nonetheless. Andrea's positive self-efficacy seemed to propel both mother and daughter to success. Although there were certainly moments of discomfort and frustration resulting from the characteristic social and emotional needs of a gifted, twice-exceptional learner, it was obvious that she excelled academically and had grown individually in social settings.

Indeed, their narrative has defied the odds, and the researcher hopes this success story can inspire others to push for and seek early detection, professional assistance, mentorship, research, and educational opportunities that can provide support and encouragement for the twice-exceptional learner to reach his or her

fullest and optimal potential. However, additional illustrated and considered stories would enhance educational professionals' understanding of the challenges parents face when raising twice-exceptional learners. Therefore, future research is planned to provide a stronger body of evidence in order to meet and accommodate such needs, for in order to support the child, it is important to support the parent. Andrea's story may help create stakeholder awareness to better understand the unique circumstances and lived experiences of such parents.

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Ensuring High-quality Dual Language Immersion Education: Louisiana's Certified Foreign Language Immersion Program Rubric

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Abstract

At the time of the demise of bilingual education in California via Proposition 227, Chueng and Drabkin (1999) discussed the unchecked prevalence of poorly run bilingual programs and the apathetic administrators who provided inadequate oversight in terms of ensuring program quality. Proponents of dual language immersion programs hope to avoid this apathy and poor implementation. Program effectiveness depends on the quality of its implementation (Li, Steele, Slater, Bacon, & Miller, 2016). While immersion practitioners and researchers are acutely aware of the list of non-negotiables that are the cornerstone of a successful immersion pathway (Fortune, 2009, de Jong, 2016), they often encounter difficulties in engendering respect of these principles among site administrators. These administrators are confused by some of the counterintuitive aspects of the immersion model. In Louisiana, Louisiana Act 196 (Session 2014) was the solution found for this issue. Louisiana Act 196 requires that the state design a template reflecting these non-negotiables, create a review rubric, attach a state certification to it, and make it mandatory for schools to obtain their certification by 2016-17. This literature review examines the rationale for each element of the immersion state site certification rubric.

Keywords: Immersion, bilingual, program evaluation, dual language immersion, one-way immersion

Introduction

This literature review examines the rationale for the Louisiana State Department of Education's certification process that is used to ensure that their immersion programs are of the highest quality. Louisiana administrators and practitioners who carefully crafted Immersion State Certification policy took into account lessons learned from bilingual education and research on immersion schools, ensuring avoidance of the common pitfalls of poor programs. At the demise of Bilingual Education in California due to Proposition 227, Chueng and Drabkin (1999) examined case studies of bilingual programs and found that there were issues with poorly run programs where "school administration seems to be quite apathetic about properly enforcing and supporting bilingual education in their schools" (p.1). The Los Angeles Times (Anderson & Pyle, 1998) story on bilingual schools in California before Proposition 227, found that only 7% of English Language Learners became fluent each year. Of the 5,800 schools with bilingual programs, 1,150 did not move any students to fluency, and for half of those schools, it was their second year without progress. In Louisiana, a cross-comparative study showed the difference between a well and a poorly administered program and how a poorly administered program can wreak havoc on student achievement and self-esteem (Haj-Broussard, 2003).

In light of the repeal of Proposition 227 by Proposition 58 by a vote of 73% to 26% (Ulloa, 2016), it is imperative that immersion programs do not fall into the same trap of administrative apathy, but rather ensure a rigorous and high-quality education for all students. Forman (2016) discussed the conflict that occurs when immersion is implemented within a school. Site administrators become confused by counterintuitive aspects of immersion. This administrator confusion threatens the non-negotiables of immersion that are needed in a high-quality, rigorous program (Fortune, 2009). In one of the more successful immersion school districts, studies on program implementation found that students were successful when teachers adhered to immersion guidelines in language use and instructional practices (Li et al., 2016). The Louisiana solution to ensure that guidelines are followed in order to avoid administrative apathy and/or confusion, and to assure high program quality was to create a site certification. This certification consists of state designed a template of non-negotiables based on the

Teacher Effectiveness for Language Learning (TELL) framework (TELL, n.d.) and a site visit to verify compliance.

The TELL framework focuses on characteristics in seven domains that are evident in effective world language teachers: environment, learning experience, collaboration, planning, performance and feedback, professionalism, and learning tools (TELL, n.d.). With the help of the Louisiana Consortium of Immersion Schools, the state created a review rubric based on the TELL framework and best practices research in immersion. To ensure that schools followed the rubric, Louisiana legislators, in ACT 361, offered state site certification to schools that score exceptionally well on the rubric (Lafleur, 2011). Once the State Certification was in place, Louisiana legislators made it mandatory for schools to undergo State Certification (Lafleur, Guillory, Montoucet, & Ortego, 2013).

Method

This literature review examined the research-based rationale behind each element of the Certified Foreign Language Immersion Program Rubric. The rubric is located on the Louisiana Believes World Languages and Immersion Website (<https://www.louisianabelieves.com/resources/library/world-languages-immersion>). The rubric elements were organized into three main categories: (1) scheduling, (2) protection and instruction of the TL, and (3) program guidelines, evaluations, and advocacy. When a search of the JSTOR Digital Library was conducted using these categories as keywords nearly 800 citations were found. Of these, only articles related directly to the specific rubric elements were selected. Then, the 33 articles were organized according to the rubric category that they addressed and included into this review of literature.

Findings

Scheduling. Scheduling is the largest area of the certification rubric. The rubric requires 60 -80% of the instructional day in the Target Language (TL), after eliminating the extra pull out classes from the schedule (library, PE, music, etc.). For middle school programs, the requirements are three core content courses, such as math, social studies, or science in the TL (one of which can be a TL language course). High school requirements are two courses per year, one of which must be a core content course in the TL.

The rationale behind the rubric requirements for specific amounts of time in the target language comes from research demonstrating that the more time spent in TL, the higher TL proficiency attained (Genesee, 1987; Lindholm-Leary, 2001; Lindholm-Leary & Howard, 2008; Turnbull, Lapkin, & Hart, 2001). It is important to note that Genesee (1981) and Lindholm-Leary (2014) found no differences are attained in first language (L1) development in dual language programs regardless of the amount of time spent in L1; however, the length of time spent in the TL had a profound effect on TL proficiency. There is even research that shows that despite reduced exposure to L1, immersion students L1 skills exceed those of non-immersion monolingual students (Björklund & Mård-Miettinen, 2011; Lindholm-Leary & Howard, 2008; Lambert, Genesee, Holobow, & Chartrand, 1993). Thus, more time in the TL does not hurt L1 and helps TL development. Lindholm-Leary and Genesee (2014) believe that more time in L2 has an additive effect on L1 development.

In contrast, students with limited time in the TL (such as 50/50 programs) will have difficulties in higher grades because the cognitive level of work is more advanced than students' TL proficiency (Met & Lorenz, 1997). Thus L1 proficiency does not suffer when TL time is maximized, but TL and academic achievement are severely affected by not having enough time in the TL.

Protection of and instruction in the TL. Numerous rubric elements deal with the protection of and instruction in the target language. The promotion of highly developed TL requires strong language policy that encourages instructional language use and discourages the use of non-instructional languages (Lindholm-Leary & Molina, 2006). In other words, there need to be school-wide policies in place that promote students' use of the TL and discourage use of L1 during TL instructional time. These policies need to be evident in the teaching that occurs, the classroom environment, and examples of classroom tests, especially during the site visit.

Sustained periods of monolingual instruction help to promote adequate language development (Howard, Sugarman, Christian, Lindholm-Leary, & Rogers, 2007).

However, sustained time and use of the TL is not sufficient. Genesee and Lindholm-Leary (2013) discuss how immersion teachers often simplify language in the class to focus on the tested content. Accuracy in language use is rarely emphasized as long as students understand the content and can communicate their ideas. To assure a focus on language, TL teachers must view every content lesson as a language lesson, including content obligatory and content compatible language objectives (Snow, Met, & Genesee, 1989). Thus, the rubric ensures that language planning integrates language and content instruction. Sites must also show the integration of vocabulary, syntax, and language functions in instructional planning, demonstrating that the teaching of content simultaneously enhances student oral and written production.

Teacher training and development. Professional development and training are meant to ensure teacher training in immersion pedagogy. Ideally, teachers should have native or near-native proficiency, but those teachers are rare, and proficiency is often inadequately assessed (Met & Lorenz, 1997). The rubric requires that teachers be native speakers of the TL or have a high level of language proficiency. In Louisiana that means an American Council of Teachers of Foreign Language Oral Proficiency Interview (ACTFL OPI) of Advanced-Low or a Common European Framework (CEFR) certificate at the B2 level. While this OPI level is lower than other states require, the rubric took into consideration that Louisiana French was often given lower ratings than standard French on the ACTFL OPI and the state wanted to ensure that Francolouisianais teachers would not be excluded from certification eligibility.

Language immersion teachers need specialized professional development to address content, language, and literacy development in a subject driven program (Fortune, Tedick, & Walker, 2008; Kong, 2009). Accordingly, each year immersion teachers must have 12 hours in immersion-specific training. The rubric also requires administrators and ELA partner teachers' have six hours of language immersion professional development in order to enhance cross-fertilization and staff unity in the immersion setting (Met & Lorenz, 1997).

Program guidelines, evaluation, and advocacy. As a safeguard to "administrative apathy" (Chueng and Drabkin, 1999) the rubric focuses on the consideration of program entrance, exit, and remediation policies to help reduce attrition. It is important that parents put their children in immersion because they value program goals, strategies, and outcomes (Boudreaux, 2010). Thus, entry into the immersion program must ensure parental support. Furthermore, it is critical that immersion programs have the resources and bilingual specialists necessary to provide instructional support, assessment, and intervention in the target language (Genesee, 2007).

As with any educational program, it is important to ensure that students learn what the program is trying to teach them. In the case of immersion, evaluation of the target language acquisition is necessary. Since immersion students may have difficulties in higher grades because the cognitive level of work is higher than TL proficiency (Met & Lorenz, 1997), it is critical that proficiency levels be monitored through testing. Monitoring proficiency levels ensures continued progress toward the language proficiency goals of the program/state (Fortune & Arabbo, 2006). This evaluation needs to entail the Louisiana immersion language checklists (see Appendix A for a link to those checklists), a grade on the report card for students TL achievement, and a more standardized test of language level (DELF, ELLOPA, SOPA, AP, etc.).

The final elements of the rubric address the need to ensure that the school is involved with advocacy for the program's continuation, growth, and place within the community. Cloud, Genesee, and Hamayan (2000) discuss how whether starting, expanding, or sustaining programs requires change, and change requires stakeholder support. This area of the rubric addresses what the schools are doing to ensure the strength of the program, the buy-in and participation of all the stakeholders, and the expansion of the program to higher grades. It is the area wherein schools demonstrate how the immersion pathway integrates into the community.

Discussion

Thus far Louisiana has fourteen site certified schools of the 39 immersion school sites. (LDOE, Press Release, May 19, 2016). While there seems to be an overall appreciation for site certification, research needs to be done to determine differences in academic level, language level, and attrition/retention numbers of students in site certified schools versus comparable non-certified immersion schools. Also, these criteria need to be compared to other criteria throughout the U.S. and Canada to determine if they can be improved or if they can help other programs improve their immersion criteria. Different rubrics will need to be created for different immersion contexts (two-way immersion, indigenous immersion) to highlight elements that are priorities in those contexts.

When presented at a recent immersion conference, attendees mentioned that this type of state certification was more valuable than SACS at their school because it met their needs. National organizations, such as the Center for Applied Research in Language Acquisition (CARLA) might want to build upon this rubric to create a national certification process. Administrators creating immersion programs might wish to use the rubric as a guide to creating a strong immersion program. Using this rubric will ensure that newly created immersion programs will not be described as "poorly run" and administrators who follow the rubric will not be considered "apathetic" (Chueng and Drabkin, 1999). Research examining programs with high levels of language levels, academic achievement, and alumni success need to be examined to see if those programs have similar features outlined in this rubric. Overall, this is just the beginning, but it appears to be a positive one towards ensuring that immersion language education remains a rigorous and successful learning context that will develop students' 21st-century skills and prepare them for the global economy.

Conclusion

This literature review examined the research-based rationale that supports Louisiana's immersion site certification process. This process was implemented to ensure a high quality immersion pathway and to avoid the pitfalls that early bilingual education programs encountered. The guiding feature of this process is a rubric that is organized into three main categories: (1) scheduling, (2), protection and instruction of the TL, and (3) program guidelines, evaluations, and advocacy. The research demonstrates the sound rationale for these categories in site certification. Future research should examine the academic, linguistic, and socio-cultural benefits of site certification. Research along these lines would verify the importance of systemic site certification policies. Further research could also serve to formalize best practices within sites that have earned certification through the processes described in this article.

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Appendix A

Access the State-Certified Immersion Schools section to find the immersion rubrics and checklists referenced in this article. The checklists are in French and Spanish with an English translation:
Louisiana Believes. (n.d.). *World languages & immersion standards*.
<https://www.louisianabelieves.com/resources/library/world-languages-immersion>

Black Museums and Experiential Learning

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Abstract

Classrooms and museums have long provided the perfect environment for students to engage information on multiple levels. Some of the information is in the form of worksheets, textbooks, and interpretive panels others in the form of societal conceptions derived from their surroundings. Museums are supposed to be equitable spaces where facts can be engaged honestly but, historically, a lack of representation of Black communities and other minority groups proved museums to be spaces that silently continued to re-enforce negative connotations and racist ideas. This was a problem that was not lost on Black communities, who decided to build their own organizations and institutions that would show them in a more human light. These organizations recognized the importance of everyone in the communities they served, and strived to convey the history and spirit of a people through exhibitions that utilized every day objects. The early Black museums and cultural centers continually used experiential learning techniques to share their culture with all who visited, because a lot of the information they wished to disseminate was informal and learned through enculturation. This article will look at how Black museums developed using the idea of the “Democratic Museum” and what is now known as experiential learning was used as a model to convey pride and community understanding in these spaces.

Keywords: Black museum movement, multicultural representation, experiential learning, museum field trips

Introduction

One can argue that many forms of education take place outside the classroom setting. From the earliest level children are learning more than just the fundamentals, they are learning who they are, who their friends are, and how they “fit” in the world around them. Students assign values, both knowingly and unconsciously, to the curriculum, their classmates, and themselves, based on the representations they are exposed to in the classroom, and throughout the school day. Education textbooks often do not adequately depict the diversity in many communities, nor do they provide a complete picture of historical events or concepts in minority cultures. James A. Banks (1993) points out that knowledge from a multitude of culture groups can be used to “illustrate the key concepts, principles, generalizations, and theories” (pg. 25) in any subject area. Field trips to culturally specific museums, as a form of experiential learning, can fill gaps in multicultural representation. Rone (2008) cites Jeffery Cantor’s (1997) definition of experiential learning as “learning activities that engage the learner directly in the phenomena being studied”. The concept behind experiential learning is that there is value in first person experiences in conveying difficult concepts in any curricula at any grade. King (1992) notes that many workshops facilitated with primary and secondary educators have utilized museums as exemplary experiential resources. The purpose of these workshops was to use materials in museums to encourage conversations around culture and how that affects the classroom. King (1992) notes that by exposing the educators to activities that challenged their opinions on culture, ethnicity, race, and value, educators can gain a deeper understanding of the students in their classrooms and embrace multiculturalism as an inherent tenant of education. The same theory can be applied to students. Experiencing narratives from multiple points of view can provide students with a clearer understanding of the significance of the lessons and how they relate to themselves, their fellow classmates, and their community. This paper discusses the history of the Black Museum Movement and the major participants and historical events that shaped the movement along the way, and its impact on the museum world as a whole and how minority communities and communities of color were represented in these spaces.

The theoretical background of this paper is that the inclusion of culturally specific spaces in curriculum building and experiential learning facilitates a deeper connection to classmates and class material. This can be accomplished by experiencing how major concepts, such as historical event or mathematical equations, affected and were impacted minority cultures. This paper will focus on the history of Black museums, the Black Museum Movement, and the institutions established during that period, as examples of versatility and usefulness of minority/culturally specific spaces when teaching more robust and inclusive lessons. For this article, qualitative research in the form of historiography was used to describe the development of the Black Museum Movement. Then, the value of incorporating fieldtrips to culturally specific museums into K-12 curriculums will be discussed.

In his book *Historiography in the Twentieth Century* Georg G. Iggers (2005) identifies historiography as the research and writing of history. Iggers discussed how history, and subsequently historiography, migrated from personal experience narratives to rigorous science. This move ultimately allowed for greater voices and interpretations of historical events and political movements. The primary texts used for this article all evaluate how lived experiences shaped the museum field, especially in relation to Black museums and the representation of Blackness within museum spaces. Moving forward with this definition of historiography, as in the study of and writing of histories told from personal experience narratives, it not only seems fitting to use this approach due to the subject matter, but also due to the desired outcome of this research. As stated earlier, the incorporation of culturally specific museums and spaces in school curriculums provides students the opportunity to evaluate the experiences of different minority groups through experiential learning. Many cultural spaces, especially in regards to Black museums, were developed to fill an informational and representative void regarding the depiction and understanding of their specific communities, and historiographical research on this topic allows for the evaluation of secondary publications related to the establishment of such spaces.

Overview of Museum History

In his definition of a museum, Mark Lilla (1985) saw these institutions as empowering structures that presented an inclusive history to be shared and understood by any patron that walked through their doors. The idea to create a space that worked to push against negative and harmful stereotypes through easily accessible and factual information that not only empowers but teaches empathy and a deeper understanding for a community of people was at the heart of the Black Museum Movement of the 1960s. Early directors and proponents of Black museums wanted to develop institutions where Black communities would learn their history and develop a greater and more positive cultural understanding. Museums offer a safe haven for people to learn tolerance and reverence for others along with cultural pride in themselves and the accomplishments of their communities. However, if a community or a people's history is only interpreted through the lens of subjugation, their view of themselves and their role in America's story is minimized.

Throughout the 19th and early 20th century, the elite in America were contemplating the education and civilization of their neighbors. Throughout this period a series of libraries, museums, and literary clubs appeared throughout major cities. The major movers in the American Museum movement were inspired by early European museum traditions. Similar to their European counterparts, earliest collections were held by private collectors and consisted primarily of artwork, artifacts, and natural items such as minerals and rocks. As time progressed the early museums became public institutions tasked with representing the communities they served. Harold Skramstad (2004), an early thinker in the American Museum movement saw a function of these early institutions as a venue where community values and self governing practices could be discussed freely. Museums were not the only organizations tasked with the representation and improvement of society during these eras; these new institutions were entrusted with educating the masses, and many of the early collections were research based. During the early 18th century, prominent people had cabinets of curiosities in their homes. The purpose of these rooms, and their cabinets, was to hold collections of interesting artifacts such as books and records that could be shared with friends and family. The 19th and 20th centuries also experienced a boom in

public libraries, literary social clubs, and exhibitions at trade fairs. Philanthropist propelled the eruption of public libraries and museums by providing funds for construction. Andrew Carnegie was instrumental in financing a large number of libraries beginning in 1881 when he presented his workers in Pittsburgh with a library. Circus tycoon P.T. Barnum opened a museum in New York City during the 19th century as well.

Early museums participated in a form of experiential learning, although not on the scale of modern museums today. These institutions, although private, provided its visitors access to artifacts that gave them a glimpse into cultures different from their own. Such learning opportunities were not limited to the halls of “established institutions” dedicated to the history the majority, many Black organizations were recognizing the value cultural institutions could have on shaping how Black communities were viewed. There was a recognition that the techniques and theories about museums being discussed in the segregated spaces, where representatives from Black communities were not allowed, could be beneficial to promote understanding and fight unfair, racist stereotypes many Black communities had to face.

Early Black Cultural Institutions

During the same eras there were parallel movements within urban Black communities. Throughout the 19th century the formation of a number of African American Literacy clubs surfaced in major cities, mirroring the mission of other social clubs, with an emphasis on encouraging literacy within the communities they served. William Whipper established the earliest known Negro literary society in 1828, known as the Reading Room.

Reading Rooms

Organizations like The Reading Room in Philadelphia served as libraries for communities of Free People of Color. These organizations hosted public programs with local speakers and provided a space where its members could practice public speaking and debate (Porter, 1936). Literary clubs are only one example of organizations and activities centered on the uplift of Black communities and the understanding of African Americans. African Americans also turned to public venues to display their accomplishments. In 1895 Booker T. Washington, along with twenty-nine other prominent African American men from all over the country met to discuss displays that would highlight the achievements of the Negro race throughout the three decades since the Emancipation Proclamation. Prior to the Emancipation Proclamation a majority of African Americans, with the exception of Free People of Color, were not allowed to participate in leisure reading or similar activities. Their stories were not told in context of local and national history, and their impact was often marginalized. After the Civil War, all African Americans could build their own communities and eventually establish their own civic institutions, like churches, schools, and libraries, to serve their needs while they adjusted to their new found freedom amid legal segregation and racism. Life after the Civil War was still restrictive for African Americans, but the freedom to move and settle where they pleased and the ability to open their own businesses and cultural institutions provided African Americans with the opportunity to build institutions based out of their experiences and preferences.

World Fairs

Throughout the early 20th century World Fairs provided opportunities for people across America to see exhibitions from all over the world. These exhibitions included presentations on science, art, and culture. Black leaders, such as W.E.B. Dubois and Carter G. Woodson felt like the 1920 World Fair was a perfect opportunity to highlight the accomplishments and contributions African Americans were making in a country healing from Civil War. Although there was some dissent among the thirty men about the inherent racism exhibited by the Atlanta World’s Fair developing committee, there was a consensus that this was an opportunity to showcase the equality and value of African Americans in this country. Prior to this event, African Americans tried to assert their presence in earlier world fairs. Their request to submit displays at the World’s Columbian exhibition in Chicago (1893) was denied, although distinguished African Americans, like Booker T. Washington and George

Washington Carver were invited to speak at the event. Booker T. Washington was one of many notable men focused on uplifting African Americans during this era. His extensive involvement at world fairs, both locally and internationally, is a testament to his belief that race relations could be fixed if the value of the Black man could be shared across society (Wilson, 2012). Washington was not the only man with this belief; other men, including W.E.B. Dubois and Carver G. Woodson joined him. Carver G. Woodson, the father of Black History, encouraged the continued education and dissemination of information in relation to African American history through his scholarly publications, the *Journal of Negro History* and *Negro History Bulletin*. He successfully petitioned the government to officially recognize a week devoted to African American History and study, which in 1976 evolved into Black History Month.

The Rise of the “Democratic Museum”

While African Americans were looking for ways to assert the value of their history and the industry of their people as a whole, a shift in thought was taking place within the museum world itself. During the mid 20th century, professionals in the field realized that large numbers of their communities were not being served by, or using, museums. Many prominent museums professionals, like John Cotton Dana, expressed their concern with the lack of use of their institutions. Mr. Dana, and others like him, felt that there were too many barriers to information in the library and museum world and proposed rethinking how resources were managed. Dana felt that the traditional 19th century approaches to information collection and dissemination were elitist, by focusing solely on “best specimens” strictly for research purposes. Dana believed such policies did more harm to the community than good (Dana, 1920). The concept of “best specimens” held racial and classist undertones that meant many artifacts and histories created and used by minority and working class communities were overlooked or excluded altogether. He proposed that there was value in “ordinary” objects, not just the treasures of monarchs or politicians, and the new anthropological approach to museums illustrated how important normal, non-traditional artifacts, such as toys, tools, clothes, furniture, diaries, letters or family records, were to communities at large (Johnson, 1937). In *The Changing Museum Idea*, Mr. Dana (1920) called this new type of museum “Democratic Museums” because they provided a place where the history of all men was valued equally. This shift focused on interpreting the history of all citizens, not just the elite, through the use of items and stories experienced by everyone. This theory, although not discussed specifically with people of color in mind or in the room, became the template for minority museums throughout the 1960’s and is still used to this day. The National Museum of African American History and Culture is specifically designed to take the patron through the many experiences in African American History by not only displaying artifacts of well renowned African Americans such as Louis Armstrong and Nat Turner, but also items that related to regional African American communities, like the Cane River Creoles from Natchitoches, Louisiana (Flanagan 2016). In addition to a well-planned physical layout of the museum, The National Museum of African American History and culture also has a number of online resources that can be used in the classroom, including a searchable digital collection (nmaahc.si.edu) and learning labs that shows related collections housed in other Smithsonian Museums (LearningLab.si.edu).

The focus of the more anthropological, Democratic Museum is on the origin of a people, their culture, and how they fit into American society. This new collection development policy valued folk histories, oral traditions, and common objects as much as examples of excellence or artifacts from crucial events in history. This new type of museum legitimized folk and oral traditions by placing them equally with more traditional artifacts. At the heart of this shift was the belief that there is value in all forms of history, and it is this shift that provided the early museums of the Black Museum Movement, and other minority museums, the type of collection policy that would best serve their patrons. A collection development policy valuing all forms of information was important for the early museums of the Black Museum Movement because it legitimized the materials their communities possessed as artifacts that could, and should, be used to interpret the local history. Traditionally, African Americans were rarely asked to donate items to a museum because they did not own items that fit the way museums were interpreting them within the American story. Because early Black

museums were shaped in the vein of folk museums, their initial collections consisted of artifacts that were important to the culture and community they were representing, and still in the hands and being used by said community (Flemming, 1994). By utilizing the democratic museum model, Black museums and subsequent minority museums were not bound to traditional collecting policies. The museums developed during the Black Museum Movement had the freedom to collect artifacts, both traditional and non-traditional, which had value within the communities they served (Gaither, 2004). In *From Storefront to Movement*, Andrea A. Burns (2013) discussed the first collection development and community outreach meetings of the Anacostia Neighborhood Museum, in Washington, DC, where the director encouraged the community to donate mundane items like mixing bowls and gloves to the museum. These meetings, which were initially focused on developing the museum quickly, became a tool the community used to socialize and strengthen connections with one another and define how they wanted to be perceived by people beyond their close community.

The way Black communities used the idea of the Democratic museum directly ties into experiential learning. Implementing exhibition and collection policies that invite the visitor to gain a deeper understanding of their cultures by engaging with easily accessible artifacts and first-hand experience narratives facilitates conversations that can easily be duplicated in any classroom setting. The practice of telling the story of oneself through “everyday” objects provides the opportunity to complicate the old tradition of “show and tell” through more thought out, research heavy assignments that allow students to express who they are and how they shape the communities around them.

The Rise of Black Museums During the Civil Rights Era

The attitude behind early Black exhibitions and other forms of Black public history was to uplift of the African American race as a whole. W.E.B Dubois, George Washington Carver, and Carter G. Woodson all focused their efforts on presenting collections that highlighted the abilities of African Americans and their contributions as an industrial people to the rest of the country, in order to illustrate the similarities between the races in hopes to positively influence race relations. Black museums were the first wave of ethnic specific museums that were established to tell the story of a particular community through the eyes of that community. The numerous civil rights court cases filed during this era document the push towards multiculturalism in American society, and museums were not immune to this change. During the 1960s, a call for equality in race relations intensified and there were vocal calls for equality and equal representation across society. During this era both the Civil Rights Movement and the Black Power Movement took hold in the U.S. and dramatically shaped how Black communities saw themselves and their value in America. These movements and created a shift in Black public history. Unlike the movement of the late 19th and early 20th centuries, the museums that developed during the 1950s-1970s focused on uplifting the communities they targeted and served.

A Civil Rights Movement of the mid 1960s began in Alabama and eventually spread throughout the United States. With leaders like Martin Luther King Jr. and Rosa Parks, this movement called for the abrogation of the implied acceptance of segregation and subjugation of African Americans in public spaces while demanding equal treatment and access to resources funded by all tax payers (Jackson, 2004). The Civil Rights Movement focused more on the legal mistreatment of African Americans instead of how they viewed themselves and their culture. The Black Power Movement consequently was born out of the Civil Rights Movement and focused on both issues. Black Power Activists recognized a need for legal action to ensure equal treatment of African Americans in all states; however they also recognized African Americans needed to reclaim their identity and their legal and political power. As Peniel E. Joseph (2006) stated in his book, *The Black Power Movement: Rethinking the Civil Rights Black Power Era*, “At its core, this movement attempted to radically redefine the relationship between blacks and American society (p.2)”. While both of these movements played a vital role in developing the Black Museum Movement, museums were spaces where communities could learn about themselves, and the pioneers of the Black Museum Movement believed their institutions could help redefine memory and challenge the current power systems in the United States (Burns, 2013). The

ambitions of the Black Museum Movement aligned with those of the Black Power Movement, and were often demonstrated in many of the programs and exhibitions these museums hosted. The Black Power Movement challenged established institutions that purposely suppressed African Americans, and museums were not immune to accusations of exclusion of and misinformation about People of Color. Museums were perceived to be agents of democracy and community pride, and they and their staff were viewed as authorities on their holdings. The exclusion or minimal inclusion African American communities in museums implies that African Americans and their stories are not important. Black museums developed during the Civil Rights Movement avidly challenged this practice of exclusion by advocating for better community representation in larger institutions. .

Black museums began to play a major role in defining equality and inclusion in America as beacons of self-identification for a people who spent decades, if not centuries trying to exhort their place in America's tapestry. These museums did far more than simply analyze the history of a people; they built their collections and practices on the traditions of the Black communities themselves (Fairchild, 2008). The focus of Black museums often made them an inaugural introduction to museums for their surrounding communities. Their foundation was built on the understanding that education was essential to the advancement of Black people. Within the communities they served these institutions proved to be not merely a storage place for artifacts, they preserved and disseminated Black culture and all that it encompassed. Like the churches, schools, and universities before them, Black museums were charged with educating future generations within the culture itself. Three pioneering institutions in the Black Museum movement were the DuSable Museum in Chicago, Illinois, the Anacostia Museum in Washington, DC and the International Afro-American Museum in Detroit, Michigan.

The DuSable Museum was the first African American museum established during the Black Museum Movement. This museum started in the home of art historian and high school teacher Dr. Margaret Burroughs. As an established activist in the Chicago area, Dr. Burroughs collected artwork and artifacts related to the African-American community of Chicago. She and her husband, with the help of influential associates, purchased a home formerly owned by the local Pullman Porter Union and commenced collecting and displaying art created by African Americans and other artifacts related to African American history. Once the museum opened the staff began to place advertisements in local papers encouraging the community to donate items and announcing upcoming displays (Burns, 2013). Over time her home was perceived as a safe place for African American cultural patrimony and the local community began to donate more items to boost their holdings. To this day, its mission is to interpret and preserve the history and culture of African and African Americans (Museum History, The DuSable Museum of African American History, 2018). Today, The DuSable Museum is a Smithsonian affiliated institution still striving towards its mission. Through public programming and teacher classroom resources (www.dusablemuseum.org/lesson-plans/), this institution actively disseminates information regarding Black people all over the world.

In 1967 the Anacostia Museum became the nation's first federally funded neighborhood museum, founded through a partnership initiative with the Smithsonian. This repository was established to bridge the growing gap between the citizens who lived in Anacostia and the rest of Washington D.C. Segregation laws, rezoning and other suppressing legal maneuvers forced the predominantly Black community to become isolated from the Washington D.C. and its growing tourist industry. Anacostia was a community that was once solidly middle class that had succumbed to violence and looting after the assassination of Martin Luther King Jr. The looting and violence instilled fear within community members and destroyed the camaraderie they once shared. The meetings held during the museum's development stages served several purposes, to help staff inform the neighborhood of the new museum and to gather important information and artifacts needed to sustain the museum. A third, unofficial purpose of these meetings was to encourage community interaction. As more and more community members began attending the early collection development meetings, more people began sharing their experiences living in Anacostia over the years. Although this museum used the DuSable Museum and its collection development techniques as a template, the Anacostia Museum is distinct from the DuSable Museum through its early programming and exhibitions. The Anacostia Museum focused on the history of

Anacostia instead of Black History as a whole, and many of its programs focused on issues that were important to the people of Anacostia specifically. Information gathered during the early meetings played a critical role in developing exhibitions and public programs. An example of an exhibit from Anacostia Museum during the late 20th century is “The Rat—Man’s Invited Affliction” which was an exhibit that discussed the living conditions in the Anacostia community (Burns, 2013).

The International Afro-American Museum, established in Detroit, Michigan, had the clearest tie to the Black Power Movement. Dr. Charles Wright, who was an obstetrician by trade, was inspired by the World War II museum he visited in Denmark. After visiting the World War II museum he began postulating how African Americans in Detroit could erect a similar institution to honor and share their stories. In 1965, after returning from his trip abroad, Dr. Wright and thirty other prominent African American men in Detroit gathered to discuss developing an African American museum. Dr. Wright believed that traditionally African American history had been “whitewashed” by mainstream institutions, and an institution that challenged traditional narratives would benefit Whites and Blacks. Built in 1967, the museum set out to provide a counter narrative to the harmful story that encouraged the “dehumanizing brain washing” and “self-degrading ideas” taught in schools and mainstream institutions (pg 29). Dr. Wright strongly believed that a Black museum could help advance the Civil Rights Movements on a larger scale by empowering the Black community, in particular men, and encouraging them to fight for better treatment and representation. If the International Afro-American Museum represented the heart of the Black Power Movement, it also represented the issues inherent in the Black Museum Movement, and the Civil Rights Movements in general. While this movement called for equal representation and inclusion, it was focused on encouraging and building up Black masculinity. The name of the repository was strategically picked to echo the chant “I Am a Man” that was being used in the Civil Rights Movement. Consistent with the Civil Rights Movement, there were very few women in visible positions of power at the museum, although there were women who played a large role in insuring that that the space reflected the mission of the Museum and the needs of the communities it served (Burns, 2013).

John S. Welch (2006) notes that during the 1960s and 1970s many community activists living in large metropolitan cities began to question the validity and usefulness of mainstream museums that excluded collections and exhibitions of minority communities. Burns (2013) began her book with an account of the “militant minority” making the same types of accusations at MUSE, a New York based museum collaborative organization meeting in 1969. During the meeting June Jordan, an African American poet and conference attendee stated:

Take me into the museum and show me myself, show me my people, show me soul America. If you cannot show me myself, if you cannot teach my people what they need to know-and they need to know the truth, and they need to know that nothing is more important than human life-then why shouldn’t I attack the temples of American and blow them up? (p. 2)

Accusations of Black exclusion in museums caused the American Association of Museums (AAM) to reexamine how museums interact with underrepresented patron communities. The organization developed committees to evaluate diversity in the field and create plans that called for a more diverse workforce, collection development policies and public programming in museums. Due to the recommendations of the committees, museums and art museums started to present more ethnic exhibitions. One such exhibition, “Harlem On My Mind: The Cultural Capital of Black America 1900-1968”, was supposed to be more inclusive of the African American art community, but it lacked of inclusion of actual artwork by African-American artists (the museum opted to use photos of artwork) or African-American academics during the planning phases of the exhibit was met with backlash from the community (Welch, 2006). Regardless of how well the exhibit was attended, this exhibition revealed the problem between existing museum professionals and the patrons they hoped to reach. By failing to utilize resources within the African-American community, the museum implied that the community still needed to be interpreted by the “establishment.” Amalia Mesa-Bains (2004) defines power as “the ability to create self-definition upon which one can cater” (p. 101). If we apply this definition of power to the museum world, by excluding members from African-American communities, museums are effectively removing their power to self identify and interpret their own cultural patrimony.

Like all change, the call for greater inclusion in museums was at first met with resistance. While the heads of established organizations and institutions were pushing for more inclusion, staff members had reservations. In addition to concern about the lack of artifacts related to African American History, there was also the concern about professional education in relation to the directors and staff of the newly developing museums (Burns, 2013). The staff of established institutions usually failed to notice inherent understandings that were shared between the staff of the new Black museums, their patron base and the collections they worked with. These inherent understandings, which Mesa-Bains (2004) referred to as “interethnic intimacy,” or the mutual respect, understanding and exchange of cultural ideas that shaped how people interpreted information, and experienced the museums. Interethnic intimacy is a valuable tool for minority communities and their museums. Museums staffed with and developed by members of a particular community, are more aware of certain cultural cues outsiders tend to miss. Black museums served a valuable purpose within the communities they served. In more traditional museums, African American voices were often stifled; institutions established during the Black Museum Movement had the ability and determination to expose America to African American culture in their own words. As a whole, Black museums and their staff understood the needs of their patron base and developed interpretation. Exhibited artifacts and hosted programs not only informed their audiences, but also validated traditional narratives from their base communities. The programs and exhibits presented insight into how the Black community viewed themselves and each other.

Black museums did not treat black history as a “flavor of the month,” as exhibits that were put on display every once in a while. Black history and culture was their sole focus. As such, Black museums could serve as templates for institutions that wanted to build better relationships with the unrepresented communities around them. Special museums grew to represent the communities they served. Minority museum directors and staff understood what the community wanted to convey, because they were members of that same community. Minority museums were involved in the expansion of exhibition and collection development that has been vital to the survival of all museums.

The very nature of how museums developed in America is a testament of the strong role they play in civic development. The earliest museums, whether developed by a state or local government or a community organization, served as a center of leadership for a community. Although they often excluded women, children, ethnic minorities, and the working class in their collection, development policies and exhibitions, the early museums were built to educate and civilize the communities they served. The Black Museum Movement and its participants believed in the value of museums as educational institutions with their power to impart pride and civic obligation within a community. The institutions were viewed as agents of change; hosting community programs addressing social issues in society and unpleasant memories no other organization wanted to discuss. By displaying art depicting slavery from the African American point of view, like the piece commissioned by the DuSable Museum, or discussing horrible living conditions facing a neighborhood every day, these museums became places that were capable of influencing and encouraging growth within their desired patron base through reflection and discussion. King (2017) referenced report compiled by the National Museum of African American History and Culture which stated that there is a consensus Black history is important but most teachers only have 8-9 percent of class time to explore it. In addition to a limited amount of time to explore Black history, many of the teachers focused exemplary examples from African American communities. This is a sufficient approach, but the information provided may not be accessible to all students and could be used as examples of tokenism to the rule instead of calling a stereotype into question. By exploring local and national minority history museums, such as The National Museum of African American History and Culture, in addition to discussing the work and lives of well celebrated members of a community students will be able to gain a deeper understanding of how a specific culture influenced those who participate in it regardless of their “standing”. As mentioned throughout this article, many of the early Black museums focused on “every day” objects to convey the importance of the communities they represented. These objects were easy to access and provided common ground and points of conversation for all visitors while also exploring the complexities of specific practices within a culture. By exploring easily accessible artifacts and experiences, such as bowls, spoons, aprons, students will be able to engage historical and social concepts, facilitate open conversation about

cultural practices with fellow classmates, and gain a deeper understanding of how these behaviors and objects shape those closest to them.

Conclusion

Historically and today, Black Museums have been places where the Black community could counter the misinformation about themselves and their culture in mainstream society. The major institutions during the Black Museum Movement served as a template for other minority communities and the museum world at large. This movement forced the museum world to acknowledge its limited portrayal of minorities in their exhibitions and develop techniques to better incorporate their surrounding underserved communities. Burns (2013) pointed out that the director of the Smithsonian during the 1960s requested that exhibits including African American history be re-evaluated to present a more positive, honest image of their experiences in America. At the heart of this movement, like all civil rights movements, was the desire to fight against the negative stereotypes about the Black community that had validated discrimination and segregation for centuries. Activists who participated in the Black Museum Movement recognized the value that museums hold in any community. They recognized that museums have the ability to influence how people viewed themselves and their abilities, and they also recognized many barriers that prevent a true depiction of African Americans and their history from being told in major, established museums. Instead of accepting defeat, activists saw an opportunity to build institutions that served several purposes: to provide a safe place for the history of their communities, to highlight why the museum world needed to address the exclusion of minorities in their collection and exhibition policies, and to communicate the detrimental impact exclusion had on their patron base as a whole.

Educators can use Black museums to provide a better educational experience for all students. These spaces offer the narratives that provide context into how communities have grown, not through stereotypical depictions, but through the voices of the many who live there and shape them on a daily basis. Culturally specific museums and sites are a wonderful resource that helps move society towards true multicultural education that is inclusive and representative of any and every student.

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Enriching Learning, Empowering Students, and Maintaining Faculty Sanity in Online Courses

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Abstract

Two decades have elapsed since American higher education was introduced to what we know today as online learning. Be it distance, distributed, e-, electronic, or online learning or education, two constants are faculty time commitment and course quality concerns. No matter the term used to describe it, this type of learning has proven to be more time-consuming for faculty than its face-to-face counterpart. Interestingly, as new technologies become available to improve quality in learning and teaching experiences, demands on faculty time seem to grow—rather than lessen—because of the technology. However, inquiries into best practices through a case study of a graduate educational technology course have provided greater learning experiences and student engagement, encouraged students to take ownership of their learning, and enabled faculty to assume more facilitation, rather than direction, roles. In turn, faculty are returned some of their time, and greater action is expected of students in their learning.

Keywords: Online course design, student-centered learning

Introduction

Online learning presents students and faculty with a learning paradigm quite different from the campus classroom (Conrad & Donaldson, 2011). The traditional lecture is an unsuitable medium for delivering online course content. For nearly two decades, students and faculty alike have been availed of an instructional evolution—a *disruption*, to reference Clayton Christensen (Christensen, 2011). This disruption created opportunities for students to learn and faculty to instruct in new, creative ways. Interestingly, those new, creative ways of the mid-1990s are now antiquated, and the new, technology-driven techniques can provide substantially enriched learning experiences. However, faculty can do only so much, and the student learning experience is sometimes compromised because of the demands placed on faculty's time. Two solutions with potential to lessen the demand on faculty time while enriching the student experience are to 1) rethink course design and 2) create an imbalance of ownership. Faculty who are willing to rethink courses altogether and relinquish some course ownership to students will find that student engagement and learning are elevated and that the faculty role makes a natural transition from that of director to that of facilitator. For this inquiry into best practice, the latter approach was taken in a graduate educational technology leadership course with surprising results.

Framework

Christensen (2011) in the context of descriptive research defines a three-stage process of observation, classification, and defining relationships. Christensen's observation stage produces a description of the phenomenon under investigation after it is observed thoroughly. This is followed by the classification stage where the characteristics observed and described are then classified or categorized in order to highlight associations. Finally, defining relationships results in conclusions about correlation or cause and effect among the classified/categorized characteristics from the earlier stages.

These three stages were applied in a self-study research process. The application was further influenced by Dinkelman's (2003) work promoting reflective teaching through self-study research in teacher education. Dinkelman's context and findings were honed to reflection and reflective practice in teacher education and the impact these could have on teacher preparation when modeled by teacher educators and used as pedagogical

tools in the practice of preparing teachers. In the context of this inquiry, Dinkelman's approach was employed to push a teacher educator outside the professional "comfort zone" and embrace reflexive practices. The goal was to improve students' learning experiences in online courses while at the same time prevent an unmanageable workload of course activities and assessments for the instructor.

The Course

This study investigated practices in a master's level course that had been designed when a linear instruction model was transformed to eliminate instructor-dependent activities in order to shift interaction from instructor-student to student-student and student-content.

The course was an educational technology leadership course that introduced graduate students to the duties of school-based and district-based technology leaders. Topics included but were not limited to budgeting, grant writing, training, infrastructure, and human capital management. Prior to the transformation, most course activities required students to respond to prompts based on text readings, and a few more substantive course activities required research outside the mainstream course agenda.

In the traditional, behavioristic read and respond model, the instructor felt compelled to direct all students' learning as if the course were face-to-face. In the absence of traditional lectures, feedback was provided on students' responses to reading prompts in lieu of answering questions or providing comments during live class lectures. Reading, contemplating, and responding to prompts from 20 students in weekly discussions, sometimes with multiple discussions per week, created an overwhelming demand of time. The design also seemed to elicit programmed, copied and pasted student responses.

The instructor's observations of the old course interface, the substance of student effort, and levels of student engagement led to conclusions that the course appearance was quite linear, driven by text documents, and visually unappealing. Student effort was also often negligible with only minimum effort being exerted, and this created limited student engagement. The observations led to classifications of the course's issues: appearance and delivery. Student feedback clarified a relationship between the two, and reflections revealed the obvious: If students did not understand how to navigate a course, how could they be expected to engage in it?

Informal student feedback was vital to the instructor's comparisons of the previous behavioristic and linear design to the flipped design that was more student-focused and interactive. The instructor's intention was not so much to make generalizations about online learning course design or pedagogy; it was more to examine the utility of selected adjustments to a particular course. Those adjustments, presented as five strategies, will provide other online instructors with best practice ideas to implement in their courses and continue the academy's work to provide quality online education opportunities for students and faculty.

Five Strategies That Disrupt the Norm

For the purpose of this inquiry, linear, instructor-centered format is considered "the norm." Described in this section are five best practices for online courses uncovered in this inquiry. These practices returned time to the instructor, swayed the pendulum of course ownership from faculty to student, and yielded greater experiences for faculty and student without comprising fidelity, authority, or learning quality.

Strategy 1: Use Modular Course Design Format

Face-to-face courses are often structured by class meetings. A strict "by class meeting" design is moot in online courses; however, a natural tendency exists to structure online courses in as similar a manner as possible. In the transformed online technology course, a modular design proved to be superior to the "by class meeting" or a more traditional weekly structure.

The course outcomes were compared to the primary course topics. While the objectives were concise, the course topics were numerous. The course topics were paired down then organized into major themes, where

each theme encompassed several existing topics. Each theme became the topic of a course module, and each module included a reasonable number of readings (20-30 pages) and activities aligned with the theme, the topics within the theme, and the relevant course outcomes (Iverson, 2005; National Business Education Association [NBEA], 2011). Each module was presented in outline form (see Figure 1), and subsequent pages linked from the outline present content and activities, which allows the module to function more as a Web site with layers of pages rather than a text document with only a single layer with excessing scrolling to find information.

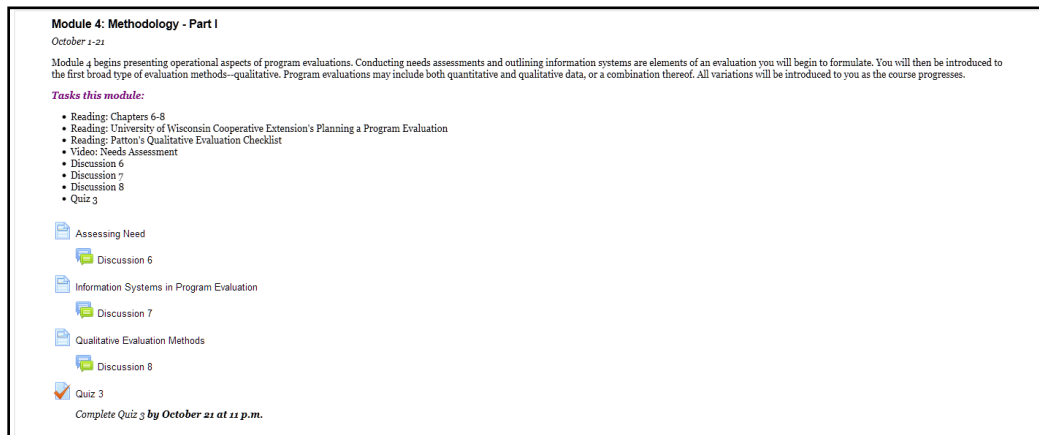


Figure 1. Modular design “index” page example

Not only did this approach streamline the general course design, but also it facilitated an organization of the course content and ideas that was superior to the linear chapter-by-chapter design of the text. Visually, it provided a palatable course appearance for students. In an informal end-of-course discussion, 50% of students made comments about the modular design versus the weekly design. According to one student, “Logging in[to] a course in January and seeing 15 weeks of material at one time was overwhelming. I dropped some courses because of the look as I believed it was too much to handle.” Another student contrasted the approaches:

I was also accustomed to being overwhelmed when I logged in each semester but really had no choice. I just dealt with my anxiety as best I could and worked through the course material. The moment I opened up [technology leadership course], I immediately thought something was missing! The course didn’t look like a textbook with paragraphs that just went on and on. The mere sight of only five topics rather than 15 alleviated the anxiety I was accustomed to.

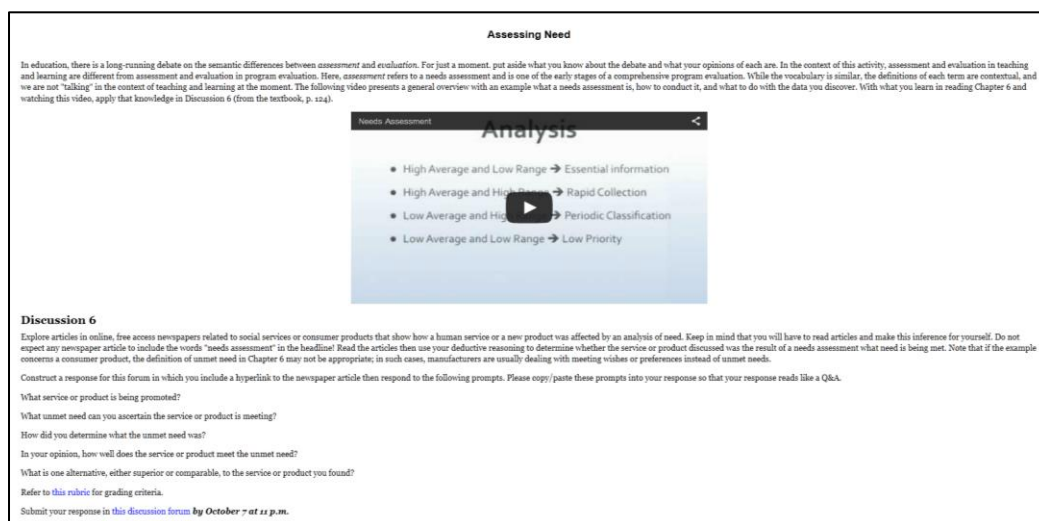


Figure 2. Module design “topic” page example

Strategy 2: Organize Partners over Groups

Groupwork was the students' most criticized element of courses. Students often felt that groupwork is tedious and inequitable with a small number of zealous students shouldering the group's work burden while fellow group members become lackadaisical in their duties. In the case of this course, partnered (or three-member teams, if necessary) activities proved to be superior to independent and group activities with more than three members assigned randomly by the instructor and changed per activity. Partner critiques and general student feedback revealed that the pairings—rather than larger groupings—created more collaborative learning experiences and provided greater student accountability (Conrad & Donaldson, 2011). As one student noted, “working with a partner was far superior to working with many group members. You were held accountable to and by one classmate. No group was so large that people could disappear and neglect their contributions to the group.” Another student's feedback was less logistical and more learning-centered; that student said that “working with a single classmate helped me focus and was a better method to build learning communities, especially since we worked with different partners for each assignment. I really got to know people from the one-on-one approach.”

Strategy 3: Differentiate Student Learning Assessments

Best practices and bodies of empirical and anecdotal literature on the best instructional practices have honed in on differentiated instruction as a superior pedagogical model to all its counterparts. Given Howard Gardner's theory on multiple intelligences, this supposition is not surprising. However, differentiated *instruction* is usually a researcher's focus; differentiated *assessment* is a less-publicized idea (NBEA, 2011).

Considering this, if teachers exhaust efforts to differentiate instruction but continue to use a singular form of learning assessment post-instruction, have some of their efforts not become futile? If we as an educated academy can agree that any given group of students' collective learning will be elevated by differentiated content delivery techniques, should we not also agree that the assessment of that learning should also be differentiated?

To account for this contention, assessments in the technology course were differentiated, as were the techniques for delivering content, in an attempt to address diverse styles of learning. Objective, subjective, standardized, and authentic assessments were used. The learning management system's discussion forum tool was used weekly; however, the tool was used as just that—a tool. The requirements of the forum activities differed. Discussion activities included strategies such as, but were not limited to, 1) brainstorming, 2) case study analyses, 3) peer-to-peer debate, and 4) student-generated and student-moderated dialogs. Other activities included objective assessments like reading quizzes and authentic assessments like fieldwork summaries and research projects.

Student feedback codified the instructor's belief that differentiated assessments would yield more accurate results of student learning. Including three general types of assessments—partner activities via discussion forums, objective assessments, and authentic written assessments—allowed each student an opportunity to vary the types of artifacts used to demonstrate learning and allowed the instructor to assess learning and, subsequently, mastery of course outcomes more comprehensively. To ensure the fidelity of student assessment, rubrics were used to evaluate all authentic assessments so that evidence of student performance against common criteria are available, even though students were allowed to produce their own customized work.

Strategy 4: Encourage Student Inquiry

Whether a required text is used, instructors should feel compelled to supplement courses with non-text content. By their very nature, texts are dated. In disciplines like technology, some information in a text is

antiquated by the moment the first copy of a first edition reaches a student's hands. Thus, the onus for ensuring courses include current and accurate content falls upon the instructor rather than the text's author.

Faculty could spend countless hours researching course topics and collecting articles, supplemental but readily available books or manuals, and Web-based content (text, video, podcasts, etc.) to share with students. This strategy is encouraged; however, alternate strategies that promote student inquiry facilitate deeper engagement.

If we as educators want to expand students' understanding of content, do we not also want to expand their skills in acquiring that understanding? One technique that was used in this technology course was to include in each module assigned content from the text as well as Web-based content. The Web content type varied from module to module but included articles, Web sites, videos, and podcasts. For each module, though, students were expected to read widely then cite and share relevant content in course activities where appropriate. In some instances, the instructor created bibliographies per topic of content students shared. At the course's conclusion, this provided each student with references to a wide body of knowledge of the course's primary topics, and each reference in that body had been vetted by class members and many had been the topics of dialogs among students (Palloff & Pratt, 2007).

When students located and contributed content to the course, they became shareholders of the course at large. It not only elicited greater inquiry on the students' parts, but also it demonstrated to them that the course was not owned and governed exclusively by the instructor. It demonstrated that all courses members, students and instructor alike, were members of a learning community where everyone had something to contribute.

Strategy 5: Remember that Theory-into-Practice Works

The philosophy of "theory into practice" can be valuable if sequenced and balanced for students. Faculty have the responsibility to inform students not only of the *what* but also of the *how* of teaching.

This broad philosophy has its place in each activity of each course as well. Students thirst to know that what they are being asked to do has a purpose, even if that purpose is not immediate.

In online courses, instructors are encouraged to embed an explicit theory-into-practice rationale for either each activity or for clusters of activities as they see fit. For example, there is an inherent lack of opportunity for immediate and real-time dialog in online courses between student and instructor. This is not to say, though, that such dialog cannot occur only that compared to face-to-face courses the dialog cannot always be immediate. In face-to-face courses, an instructor discusses an activity with all students in real-time and in the same physical space; this is replicated in one of several ways in online courses.

A question asked often by students is one of relevance. "How will this help me?" "What's the point of this assignment?" Hopefully, an instructor will have cohesive responses to these questions prepared. In online courses, though, instructors are encouraged to answer these questions before they are posed. In fact, instructors are encouraged to answer all questions before they are posed. With time and experience in teaching any course, an instructor will acquire the acumen to anticipate certain questions. To avoid confusion, angst, and wasted time in online courses, providing details in activity requirements that would address all anticipated questions (of logistics, content, and relevance) proved to reduce the number of student inquiries in this technology course.

Conclusion

Presented here are five lessons learned that resulted from a reflective experience exemplified by Dinkelman (2003) within a context of disruption (Christensen, 2011). Online learning has dominated higher education in these early years of the 21st Century; in fact, some would conclude pervaded. Consequently, faculty have been forced into this new asynchronous teaching medium where a clock does not govern when class begins or ends. Instructors who have honed their skills in online course design and delivery that is aligned to instructional minutes now find themselves in nebulous territory where time provides no parameters for their work. Typically, an instructor's first approach to the online classroom is to replicate the face-to-face classroom,

and they soon discover that approach has more challenges than opportunities. The second attempt likely results in overwhelming expectations and burn-out because the instructor struggles with balancing content delivery, student activities, and assessments while justifying how the online course is comparable in time, effort, and credit hours to its face-to-face equivalent.

These considerations—and others beside philosophical objections—are at the core of resistance to online learning. Faculty are encouraged to approach online learning slowly and to explore its potential as both the single delivery medium and as a supplement to face-to-face instruction. The five strategies discussed here are best practice suggestions for both design and delivery of online courses and online supplements to “traditional” courses. However, they are not a means to an end; they are considerations with potential for meaningful results. These practices emerged from personal reflection and, more importantly, from consumers of the service faculty provide. They are not only practical suggestions for faculty but also techniques evaluated by students.

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