Building a Dangerous Outpost in the Green Mountain State: A Case Study of Educator Preparation Policymaking

David J. McGough
Northern Vermont University

Claudine Bedell
Saint Michael's College
&
Barri Tinkler
University of Vermont
United States

Abstract: Poised at a bifurcation, the educator preparation community in Vermont faced either the adoption of a generic product for the assessment of initial educator licensure candidates or the comprehensive revision of a longstanding state-based assessment portfolio. Using a case study approach and narrative methods, specifically the Narrative Policy Framework (McBeth, Jones, & Shanahan, 2014), the authors analyze a project in which teacher educators intervened to shape the direction of educator preparation policymaking by designing an innovative assessment portfolio and a collaborative calibration system. The analysis reveals insights about the policymaking arena and demonstrates the value of education-related policymaking that includes teacher educators as active agents in collaboration with state personnel and policymakers. The case contributes to the notion of policymaking as a narrative process. In this case, a narrative of hope emerged as a guiding storyline.
Keywords: teacher education; performance assessment; policy analysis; licensure candidate portfolios; case study; narrative methods; Vermont

Construyendo una posición peligrosa en el estado de Green Mountain: Un estudio de caso de la preparación de políticas educativas

Resumen: Apuntando a una bifurcación, la comunidad de preparación educativa en Vermont se enfrentó ya sea a la adopción de un producto genérico para la evaluación de los candidatos iniciales de licenciamiento de educadores o la revisión integral de un portafolio de evaluación estatal de larga data. Utilizando un enfoque de estudio de caso y métodos narrativos, específicamente el Marco de Política Narrativa (McBeth, Jones y Shanahan, 2014), los autores analizan un proyecto en el que los formadores de docentes intervinieron para moldear la dirección de la preparación de políticas educativas diseñando una cartera de evaluación innovadora y un sistema colaborativo de calibración. El análisis revela ideas sobre el ámbito de la formulación de políticas y demuestra el valor de la formulación de políticas relacionadas con la educación que incluye a los formadores de docentes como agentes activos en colaboración con el personal del estado y los responsables de la formulación de políticas. El caso contribuye a la noción de formulación de políticas como un proceso narrativo. En este caso, una narración de esperanza surgió como una historia guía.
Palabras clave: formación docente; evaluación del desempeño; análisis de políticas; carteras de candidatos a licenciatura; caso de estudio; métodos narrativos; Vermont

Construir uma posição perigosa no estado Green Mountain: Um estudo de caso da preparação de políticas educacionais

Resumo: Com o objetivo de uma bifurcação, a comunidade de preparação educacional em Vermont enfrentaram tanto a adoção de um produto genérico para a avaliação dos candidatos iniciais de licenciamento educadores ou revisão abrangente de uma carteira de avaliação do estado de longa data. Usando uma abordagem de métodos de estudo de caso e narrativas, especificamente Quadro de Política Narrativa (McBeth, Jones e Shanahan, 2014), os autores analisam um projeto em que os formadores de professores envolvidos na formação do sentido da elaboração de políticas educacionais projetando um portfólio de avaliação inovador e um sistema de calibração colaborativa. A análise revela insights sobre o campo da política e demonstra o valor de políticas relacionadas à educação, incluindo formadores de professores como agentes ativos em colaboração com o pessoal do Estado e os responsáveis pela política . O caso contribui para a noção de política como um processo narrativo. Neste caso, uma história de esperança surgiu como uma história guia.
Palavras-chave: formação de professores; avaliação de desempenho; análise de políticas; carteiras de candidatos para um diploma; caso de estudo; métodos narrativos; Vermont

Building a Dangerous Outpost in the Green Mountain State:
A Case Study of Educator Preparation Policymaking

That teacher education exists within a contested terrain is problematic and, at times, disheartening. Yet, this condition is not new. Indeed, the enduring challenges of this field are its defining parameters. Recognizing this fate for the educational enterprise, Dewey encouraged educators to insert their voices into the political fray for claims on the future of their profession. By asserting their voices, grounded in genuine experience with diverse constituents, educators would build "dangerous outposts of a humane civilization" (Dewey, 1922/1983, p. 334). We see in Dewey's call a recognition of the contentious nature of educational policymaking and confidence that educators can bring a seasoned and learner-centered clarity to the debate, thereby shifting the tone from deficits to strengths, from inevitability to possibility, and from cynicism to hope. Such shifts are markers of a dangerously humane future. Often, educator-led endeavors are manifest in classrooms, resource rooms, and faculty departments, occasionally reaching to school, district, or college-wide influence. More rarely, conditions align, courageous bonds are formed, boldness emerges, and educators find themselves in a position to influence policy at the state level or beyond. This article reports on our examination of a case in which teacher educators seized an opportunity to guide the development and implementation of a state-level policy that would direct educator preparation in Vermont. By joining with state personnel and policymakers in an inclusive and deliberative process guided by a grand vision, the educator preparation community in Vermont is building the sort of dangerous outpost that Dewey envisioned.

We conducted a study of the case in order to analyze how a group of teacher educators, including the authors of this article, led a statewide initiative to revise a state-based initial educator performance assessment system that upheld a valued philosophy of education which has permeated the local education community for decades. Our analysis demonstrates the narrative nature of policymaking. In order to overcome a conventional contemporary narrative that state-of-the-art educator preparation requires the use of a standardized and detached performance assessment product, teacher educators plunged into a policymaking arena to assert an alternative, inspiring narrative derived from longstanding practice, research methods, and a premise that candidate assessment should be a pedagogically valuable experience. Instead of adopting a generic portfolio product from a commercial provider, teacher educators throughout the state offered to create a portfolio that could be customized to meet the needs of a variety of preparation programs, and a collaborative calibration system to unify all programs. This alternative narrative "recast the policy problem" (Roe, 1994, as cited in Jones & McBeth, 2010, p. 335) thereby generating a collective future for teacher education across the state. The study gives voice to teacher educators working as scholar-advocates in the realm of educational policymaking, where such voices are often silenced.

The essential question of our study was straightforward: What can we as teacher educators and participant observers learn from our delve into this policymaking arena? This question positions the inquiry within Boyer's (1990) *scholarship of application* wherein "social problems *themselves* define an agenda for scholarly investigation" (p. 32, emphasis in original). First, we review efforts of teacher educators in the US to study innovations intended to improve the profession, particularly in times of pressure from outside ideological forces. Next, we recount the case and report on our analysis using narrative methods (e.g. Connelly & Clandinin, 2006; McBeth, Jones, & Shanahan, 2014). The analysis leads to a discussion of the implications of this case for assessment of initial licensure candidates, teacher education advocacy, and the narrative study of policymaking.

Related Literature

When reviewing research conducted by teacher educators on best practice in the field, the level of engagement and innovation is evident. Teacher educators are working to bridge connections between theory and practice through strategic clinical experiences (Campbell & Dunleavy, 2016), revisiting and refining their curriculum to rethink how we prepare preservice teachers to better serve all learners (Mills & Ballantyne, 2016), focusing attention on preparing future teachers to use assessment to foster student learning (DeLuca, Chavez, Bellara, & Cao, 2013), and enhancing teaching and learning through the use of technology (Shaffer, Nash, & Ruis, 2015). This body of research stands in contrast to the deficit lens used by policymakers who want to "improve teacher preparation" (Ginsberg & Kingston, 2014, p. 6) through accountability systems. This approach implies that teacher educators would not choose to focus on continuous change and improvement unless forced to do so. In part, this deficit narrative stems from neoliberal policies seeking to commodify teacher education. According to Zeichner (2010), "what we are seeing in the U.S. is the tremendous growth of alternatives to traditional college and university-based teacher education that include many new for-profit companies and universities that have gone into the business of preparing teachers" (p. 1545). Positioning traditional teacher education programs as low quality strengthens the argument for alternatives. These alternatives have been supported by federal and state policies under the neoliberal premise that competition in the marketplace will lead to improved quality.

A result of this deficit narrative of teacher education is an increased focus on accountability. Three recent initiatives focused on accountability in teacher education have had and will continue to have a significant impact on the field: the edTPA, the Council for the Accreditation of Educator Preparation (CAEP) standards, and the proposed, currently suspended, federal regulations for the implementation of the Higher Education Act (Cochran-Smith et al., 2016). The proposed federal regulations, approved by the Obama administration then withdrawn by the Trump administration, align closely with CAEP's Standard 4 requirement to tie the evaluation of program quality to the impact graduates have on K-12 student learning. There is, however, little evidence to support the claim that these initiatives will improve the quality of teacher preparation (Cochran-Smith et al., 2016). The third initiative, edTPA, has had a different reception in the field of teacher education.

The edTPA, developed by Stanford University, is a modified version of the performance assessment developed for the state of California called PACT (Cochran-Smith et al., 2016). Though the edTPA has had supporters within the teacher education community, including the American Association of Colleges for Teacher Education (AACTE), there are critiques of this assessment. For example, there are questions about the claims of objectivity and rigor associated with the assessment (Dover & Schultz, 2016). In addition, since the assessment is administered by a private, for-profit company, there are concerns about the commercialization and marketing strategies being used to pressure states and programs to adopt the assessment (Au, 2013). As noted by Reagan, Schram, McCurdy, Chang, and Evans (2016), "the edTPA's inclusion of multiple actors outside of the profession raises questions about the extent to which the assessment is still close to the spirit of an 'assessment for educators, by educators'" (p. 17). Given the impact that these accountability initiatives will have on the field, it is important that teacher educators have a voice in the policymaking process. The reality, however, is that teacher educators rarely have the opportunity to bring their expertise to bear on important decisions related to their work. As such, the present case contributes to ongoing theoretical and empirical policy-related studies of teacher education by teacher educators.

Case Overview

In Vermont, policymaking for education is managed through governor appointments. The Governor appoints the Secretary of Education, as well as members of the Vermont State Board of Education (VSBE) and the Vermont Standards Board for Professional Educators (VSBPE). The Secretary of Education oversees the Vermont Agency of Education (AOE), which regulates policy developed by the two policymaking boards. The VSBE is an 11-member, independent body that is "responsible for the establishment, advancement, and evaluation of public education policy" ("State Board," n.d.). The VSBPE is a "13-member, teacher majority, policy-making board. The Board's purpose is to oversee the training, licensing and professional standards of teachers and administrators. Its overarching goal is promotion of educator quality" ("Vermont Standards," n.d.). While the VSBPE is a teacher-majority board, membership also includes representatives from private and public higher education (typically teacher educators), a school administrator, and a school board member.

The operations of these two policy boards represent a democratic ethos surrounding education that might not be as prevalent in other states. That ethos has manifest a longstanding philosophy valuing learner-centered, authentic designs for both K-12 and professional educators. For example, twenty years ago, Thousand and Villa (1995) described trends in educational policy in Vermont that led to the early movement for including children with disabilities in regular classrooms. Additionally, during the initial era of the accountability movement, Vermont instituted a statewide assessment portfolio system for the elementary students (DeWitt, 1991; Mathews, 2004) while other states adopted widespread standardized testing. As well, in the early 1990's, with support from the VSBPE, a panel composed of higher education administrators and teacher educators designed and implemented a statewide performance-based assessment portfolio for initial licensure candidates (Dollase, 1996), the Level 1 Licensure Portfolio (L1LP). Along with an array of requirements, including PRAXIS exams, fieldwork observations, and academic achievements, all candidates for initial licensure are required to complete the portfolio, which is managed and scored by each educator preparation program (EPP) using a common rubric. The AOE oversees the implementation of the portfolio through a program review and approval procedure. This statewide performance assessment system has been refined over the years in response to feedback from EPPs, results of candidate performance, and outcomes of the program-approval process.

The L1LP was designed to enable candidates and EPPs to assess performance in accordance with the *Five Standards and 16 Principles for Vermont Educators*. These are a set of standards developed within the state for preservice and professional educators. The portfolio's form, structure, and purpose was derived from the approach developed by the National Board for Professional Teaching Standards. Though effective in many ways, after years of use the educator preparation community recognized that the L1LP needed improvement. For example, the prompts did not always align well with the Principles, and it was description-based more so than evidence-based. Additionally, the absence of a formal, direct system of calibration across EPPs posed difficulties for program regulation and approval.

Concurrent with the emerging perspective that the L1LP was in need of revision, in June 2013, the VSBPE adopted the *InTASC Model Core Teaching Standards and Learning Progressions for Teachers* (Council of Chief State School Officers, 2013) as the *Core Teaching Standards for Vermont Educators*. As a result of this switch in professional standards, the L1LP was simultaneously outdated and the VSBPE needed to make a decision about a replacement. On one hand, state regulators and policymakers were aware of the generic teacher candidate assessment products adopted by other states; on the other hand, the state's deep roots in an educational philosophy favoring learner-

centered approaches, its long history of vesting educator preparation programs with direct responsibility for initial educator preparation in partnership with the AOE, and a climate of Yankee thriftiness (see, Ericson, 2007) would favor replacement of the L1LP with a new state-based system. Our analysis examines the details of the case surrounding the decision-making process that resulted in a state-based replacement for the L1LP.

The authors of this article served on the committee that developed the replacement portfolio and calibration system. We represent the state's largest university, a public college, and a small, private, liberal arts college. One author was also a member of the VSBPE at the time. Though unknown to each other prior to our work on the portfolio revision project, we came together around a common vision for that process. Through the intense labor at the center of the design process, we noticed and participated in the optimism, conflict, cohesion, flexible role-taking, anxiety, and innumerable breakthroughs of the endeavor. Ultimately, the new portfolio was accepted with measured joy across 16 diverse educator preparation institutions (many with multiple licensure programs), the staff of the AOE, and the members of the VSBPE. The committee had achieved consensus through democratic deliberation, which seemed quite remarkable in the realm of educational policymaking, particularly considering current ideological trends. In retrospect, we wondered how this happened and, henceforth, launched a study to examine the experience as a post hoc, qualitative analysis.

Methods

As participants in a policymaking arena, we sought, through this inquiry, to gain clarity about the process that could be helpful in interpreting the experience. As such, the study employs a qualitative approach. The parameters of our inquiry align with Merriam's (1998) definition for a qualitative case study: "this design is chosen precisely because researchers are interested in insight, discovery, and interpretation rather than hypothesis testing" (pp. 28-29). By examining our contributions as teacher education scholars within a project intended to create a policy governing educator preparation, we meant to gain both professional insight and civic foresight concerning the direction of teacher education in our society. Since this case study included our own experiences and perspectives as part of the data, we turned to narrative inquiry to aid in our data analysis.

Connelly and Clandinin (2006) provide a paradigm for treating qualitative, experiential data as narrative substance. They frame narrative inquiry as involving *living* and *telling*, which, through the process of inquiry lead to *reliving* and *retelling*. For the present study, we first *lived* the case as active, reflexive participants, and then, in the quest to draw points of learning from the experience, we began *telling* the story through data accumulation and review. Analysis of the accumulated data compelled us to *relive* and *retell*: That is, through the analysis, the narrative of the case became clearer, more coherent, and more interesting.

Our case evolved over time. As such, we treated it as a lifestory for the purposes of determining its narrative arc. When conducting a lifestory analysis, McAdams (1993) recommends segmenting the life narrative into definable chapters then examining these chapters for significant episodes, or vice versa—identifying benchmark episodes and using them to determine chapters. We found it helpful to construct a scaled timeline depicting the key events of the case. The timeline served as an organizing graphic for the data, which included official meeting minutes and related informal notes, iterations of the outcome product (the portfolio and the accompanying calibration system), status update presentations to the educator preparation community and the VSBPE, email correspondence between various participants, notes of our conversations as participant-researchers, and notes on conversations with other participants throughout the process. Our discussions around the process became both an important data source as well as a method of data analysis (Constantino,

2008). We began recording, accumulating, and filing data with the first significant meeting in May 2014. Data collection continued through approval of the portfolio in June 2015, and culminated, for the purposes of this article, with a meeting of all stakeholders in September 2015, to launch the year-long pilot phase of the project. The primary events anchoring the timeline are meetings held between June 2014 and October 2015. See Table 2 for a simplified version of the timeline.

Once we graphed the case's meetings, memorandums, presentations, and major events on the timeline, we noticed, in accordance with McAdams's (1993) suggestion, that the case could be segmented into three distinct phases: a 12-month *discover phase* between the adoption of the Core Teaching Standards (CTS), in June 2013, and the formal initiation of the portfolio revision process, in June 2014; a 15-month *design phase* between June 2014 and September 2015; and an 11-month *pilot phase*, September 2015 through June 2016. Next, we coded benchmark episodes such as high points, low points, and turning points (McAdams, 1993). Lastly, we scrutinized the flow of events within the design phase, the heart of the case, to discern patterns and relationships. Through this process, we identified distinct chapters of the narrative. These are illustrated in the section below.

After analyzing the data using the more inductive approach of lifestory, we then examined the case through the lens of The *Narrative Policy Framework* (NPF; Jones & McBeth, 2010; McBeth, Jones, & Shanahan, 2014; Shanahan, Jones, & McBeth, 2011). The goal of NPF is to examine how policy narratives shape policy outcomes (Ertas, 2015). According to Shanahan, Jones, McBeth, and Lane (2013), "The central questions of NPF scholarship are: What is the empirical role of policy narratives in the public policy process and do policy narratives influence policy outcomes?" (p. 455). NPF employs narrative inquiry to examine the details of policymaking for specific cases, treating the policymaking process as a competition among individuals, coalitions, or larger systems to establish an overriding story about the rationale, intent, and outcome of a favored policy direction. To approach policymaking as a narrative phenomenon, the NPF provides two sets of tools, which can be deployed at any of three levels (meso, micro, or macro). The first analytic tool aids researchers in determining the narrative structure of the policymaking encounter; this involves examining the case through four components—*setting*, *characters*, *plot*, and *moral* or proffered solution (McBeth, Jones, & Shanahan, 2014). Beginning with a structural analysis helps researchers organize the case data and exposes the broad contours of the narrative. The second analytic tool draws attention to the elemental movement of the narrative by having researchers examine, among others factors, characters' strategies and beliefs. The analysis for our case is at the *meso-level*, which examines narrative processes between or among interest groups, whereas a *micro-level* analysis examines processes between individuals, and a *macro-level* analysis examines process between larger social forces. Hence, in order to address our question, our analysis combined both an investigation of the lifestory of the case as well as the structure and operation of the policy narrative for this case.

To augment the NPF's second analytic tool, examining characters' strategies and beliefs, we found it helpful to employ two frameworks for understanding group dynamics, one broad and the other specific. These frameworks served as lenses enabling us to peer into the flow of interactions, beliefs, and shifting demeanor throughout the policymaking process. Lewin's (1947) theory of group dynamics provides a broad framework for ascertaining social and institutional change. Groups experiencing a change processes pass through three stages: *unfreezing*, dissipation of adherence to current norms; *moving*, shifting to new social practices; and *freezing*, forming those new practices into new normed behaviors and beliefs. Tuckman (1965/2001) and Tuckman and Jensen (1977) provide a framework for discerning the specific dynamics of a particular social group's experience of growth and change. The model delineates five phases of a group's growth as members struggle to accomplish a goal: *forming*, "orientation/testing/dependence"; *storming*, "conflict"; *norming*, "group cohesion"; *performing*, "functional role-relatedness"; and, *adjourning*, "separation" (Tuckman, 1965, p.

14; Tuckman & Jensen, 1977, p. 47). The case analysis describes the circumstances that disclose the workings of these frameworks for our case.

Validity

Creswell and Miller (2000) provide clarity on validity for qualitative studies: "We define validity as how accurately the account represents participants' realities of the social phenomena and is credible to them (Schwandt, 1997). Procedures for validity include those strategies used by researchers to establish the credibility of their study" (pp. 124-125). Our objective was to generate insights about the development of the policy narrative surrounding the new portfolio from an insider's perspective. The results described below denote our perceptions of that process.

Our analytic process also strengthens credibility primarily through collaborative discourse about the data, collective construction and refinement of the detailed graphic timeline, and communal vetting of our independent interpretations of experiences. These processes are in accordance with *grounded theory* analysis (Glasser & Stauss, 1967), or, as Merriam (2009) puts it, "having a conversation with your data" (p. 178). Overall, whether a specific vignette definitively represents one particular stage of the narrative plot or that one exchange flawlessly demonstrates this or that narrative theme is minor compared with the broader insights of the stages and themes themselves. As Creswell and Miller (2000) state, "Throughout this discussion, we make the assumption that validity refers not to the data but to the inferences drawn from them" (p. 125).

Analysis and Results

Policymaking, from the stance of the NPF (McBeth, Jones, & Shanahan, 2014), is the enactment of a story about the way the world should be. Coalitions of actors, positioned as good and evil, compete for control of the dominant narrative about a problem, thereby shaping the policymaking process toward a favored outcome. The points of tension in a policymaking process are manifestations of that competition. We identified many points of tension, as well as points of calm, throughout the case. As we examined the data surrounding these points in relation to each other, we detected five chapters through which the policy narrative's plot developed. Table 2 provides an overview of the chapters. Each chapter evoked a specific tension between distinct constructs that vied for characters' attention and loyalty. These are detailed in the subsection below titled *Plot*. Instead of coalitions of actors competing for control of the narrative in order to win a preferred outcome, the tensions we identified emerged from the dynamics of the group process itself, as participants strove to achieve a commonly desired outcome. The constructs in tension revolved around perceptions about what was happening and what needed to be done in order to reach a viable resolution together. The plot, therefore, was more so in the genre of a group quest of self-discovery than an actor-driven, good versus evil action drama. We use the term *narrative theme* to identify the tensions aligned with each chapter. Like strands woven together to form a rope or subplots of a story, the themes meld together to establish the overarching narrative system of the case. In the sections below we use the NPF structure—characters, setting, plot, solution—to organize the results.

Before moving to the results, a clarification might be helpful. On the surface, it seems tempting to frame this case as a struggle for control of the VSBPE's decision about replacement of the L1LP, positioning the generic products as evil and the local effort as good. However, our analysis reveals that the struggle, such as it was, existed within the process of group development represented by the quest. The battle was between internal forces. For example, one such force was a conviction among members of the educator preparation community that we could craft an assessment system that would be imbued with authentic learning for all stakeholders, that would

both challenge and inspire all stakeholders, that would be both innovative yet manageable for all stakeholders, and that would be capable of bolstering legitimacy and meaningfulness. Another was doubt about our ability to achieve such a goal in the available time. This sentiment is captured by a note in the minutes of the meeting during which the community decided to create a replacement for the L1LP instead of adopting one of the generic products: "It was pointed out by [one member of the gathering] that it would be wise to continue to stay abreast of ETS and edTPA because we have no idea as to whether or not this effort to create our portfolio will be successful in a year."

Characters

In order to protect the anonymity of participants, we decided to treat characters separately from individual actors. The characters are entities that represent social roles adhering to particular scripts. In this case, for example, we treated the VSBPE as a character adhering to a particular system of beliefs and strategies about policymaking; we treated inanimate entities such as InTASC in a similar fashion. The characters are listed in Table 1.

Table 1
Characters

	Character	Description
1	VSBPE	Vermont Standards Board for Professional Educators. A 13-member, teacher majority, policymaking board. The Board's purpose is to oversee the training, licensing and professional standards of teachers and administrators. Its overarching goal is promotion of educator quality.
2	VSBE	Vermont State Board of Education. This board sets policy for K-12 education.
3	AOE/EQ	The Agency of Education: Educator Quality Division implements and regulates educator policy issues approved by the VSBPE, the US DOE, and related interstate agencies such as NASDTEC.
4	VCTE	Vermont Council of Teacher Educators. An unstructured assemblage of teacher educators that gathers intermittently to address current topics or issues related to educator preparation.
5	EPPs	Educator Preparation Programs. There are 16 institutions across the state that sponsor programs preparing candidates for initial licensure. This group includes public and private colleges with traditional programs, independent organizations with alternative programs, and an alternative route program managed by the AOE.

Table 1 cont.
Characters

	Character	Description
9	InTASC Progressions	The Progressions are short phrases that "describe the increasing complexity and sophistication of teaching practice for each core standard across three developmental levels" (CCSSO, 2013, p. 10). "The progressions describe effective teaching with more specificity than the standards, provide guidance about how practice might be improved, and outline possible professional learning experiences to bring about such improvements" (CCSSO, 2013, p. 10).
10	edTPA	"edTPA is a performance-based, subject-specific assessment and support system used by teacher preparation programs throughout the United States to emphasize, measure and support the skills and knowledge that all teachers need from Day 1 in the classroom." (https://www.edtpa.com/, n.d., *About*, para. 3)
11	PPAT	The candidate performance assessment system developed by the Educational Testing Service (ETS).
12	VLP	Vermont Licensure Portfolio. The new candidate performance assessment portfolio and calibration system approved by the VSBPE in June 2015.
13	PRC	Portfolio Review Committee. The committee formed with membership from the VCTE, the AOE, and the VSBPE to draft a recommendation to the VSBPE regarding a replacement for the L1LP.
14	Design Group B & Design Team	The subcommittee of the PRC that became the Design Team of the PRC. The authors of this article served on Design Group B and the Design Team, and initiated this case study to draw insights from that experience.
15	EPIC	Educator Preparation Inquiry Collaborative. A scholarly association formed by members of the PRC to study and guide the calibration system for the VLP.

Setting

Policies, and the narratives that warrant them, emerge within a contextual stew. The NPF refers to context as the setting. Like the characters and the plot, the setting is an agent of a narrative consisting of broad forces such as social ideologies, historical trends, and longstanding norms. The Case Overview describes the essential setting for our case. The remainder of this section provides additional details.

When the VSBPE approved the Core Teaching Standards (CTS) in June 2013, and the L1LP became outdated, there was an imminent need for a replacement. However, no formal procedure

existed to trigger a process for addressing that need. As such, circumstances enabled a challenge to the state's core beliefs about education, and the kernels of a potential change in policy direction were established. The edTPA was gaining recognition as a universal instrument for candidate assessment. As well, the Educational Testing Service (ETS) had introduced a performance-based candidate assessment system, the PPAT (originally, the PRAXIS Performance Assessment for Teachers), as an alternative to the edTPA. Both products, which are perceived as objective and unbiased, provided an apparently simple solution for replacement of the L1LP.

In October 2013, staff members from the AOE made a presentation to the educator preparation community about the need for a new candidate assessment procedure. The group discussed edTPA, PPAT, and potential revision of the L1LP without drafting any plans. In the spring of 2014, the VSBPE heard presentations about both edTPA and PPAT. Concurrently, two EPPs participated in a pilot of the PPAT with their candidates. The movement to replace the L1LP with one of the generic products seemed to be gaining momentum, bringing the educator preparation community in the state to a potential bifurcation: a seemingly small shift in policy-- adopting one of the generic assessment products--could have a major effect on educator preparation and outcomes. However, the VSBPE was not easily convinced.

In early May 2014, teacher educators gathered for a routine meeting of the Vermont Council of Teacher Educators (VCTE), an informal network of the state's EPPs. The Vermont Secretary of Education joined the meeting to discuss general issues related to candidate preparation and program approval. The minutes of this meeting reveal a wide-ranging conversation including discussion points such as:

What does it mean to [earn] Vermont licensure?
How can teacher education [as a field] provide more support in the movement to
    improve teaching?
How can we assure effectiveness across preparation programs?
How can we research teacher [education] effectiveness?
What would you like to see programs use to demonstrate their performances?
How can we measure what we know matters?
How much effort are we willing to put into doing so?

As the discussion turned to matters of candidate preparation and assessment, and the impending need to replace the L1LP, the Secretary mentioned a state-based candidate assessment process that she witnessed while working in another state. This point bolstered the possibility of replacing the L1LP with a new state-based portfolio instead of adopting either of the generic products. A few of the teacher educators present at the meeting, including one of the authors of this paper, recognized this as an opportunity to maintain the state's tradition of a learner-centered assessment portfolio. A member of the AOE posed the key question regarding this possibility: "Is it a good use of our time: Do we have the capacity to build and sustain it?" Though a definitive reply was not forthcoming during that meeting, the discussion modified the orientation of the emerging policy narrative.

Immediately, the VCTE called for a discussion with the VSBPE regarding a formal plan for replacing the L1LP and scheduled a follow-up meeting of the educator preparation community. Within two weeks, the VSBPE produced a charge calling for the formation of a volunteer committee, the Portfolio Review Committee (PRC)—comprised of teacher educators, state regulators, and VSBPE members—to examine the situation and make a recommendation to either adopt one of the generic assessment systems, forthwith, or to develop a new locally-designed system to replace the L1LP, which would need to be completed within one year. The Committee's recommendation would be consequential since the VSBPE's decision would constitute a policy

guiding the regulation of all educator preparation programs in the state and would serve as an assessment of candidates for initial licensure.

The follow-up meeting, in June 2014, was Meeting #1 of the PRC. All members of the educator preparation community were invited and everyone who attended the meeting was deemed to be a member of the PRC. All subsequent meetings of the PRC were equally open. At that first meeting of the PRC, the group decided to move forward with a recommendation to design a new state-based system. By May 2015, the Committee had produced a comprehensive plan for an innovative performance-based candidate assessment portfolio and an accompanying statewide calibration system. The VSBPE approved the new Vermont Licensure Portfolio (VLP) and the accompanying calibration system as a replacement for the L1LP in June 2015. During the 2015-2016 academic year, educator preparation programs piloted the VLP and developed a set of recommendations for revisions using feedback, data, and experience. The VSBPE approved the revisions in June 2016 and the VLP was implemented statewide beginning with the 2016-17 academic year.

Though a comparison of the VLP to edTPA and PPAT is beyond the scope of this article, a quick overview may be helpful. The VLP has three Parts (Part I: The Learner and the Learning; Part II: Content Knowledge & Instructional Practice; and Part III: Professional Responsibility), which can be completed over the course of a pre-service educator's preparation program. The portfolio is designed to be both formative and summative. Unlike the L1LP, which was primarily descriptive, the VLP is evidence-based. That is, pre-service educators collect evidence of their practice while in their preparation program. That evidence demonstrates proficiency of the Core Teaching Standards. Candidates use the evidence to critically analyze their performance, identifying strengths and areas of growth.

Taken together, the eleven months between the VSBPE's adoption of the InTASC standards in June 2013 and Meeting #1 of the PRC, which we deemed the discovery phase of the case, denote the mixture of anticipation and anxiety that attends an impending change process. This was the messy prelude that precedes narrative action, when the characters in a setting attain realization of the scope of a necessary shift, and the motivation to push through distraction and lassitude. This tone is indicative of Lewin's (1947) *unfreezing* stage: "To break open the shell of complacency and self-righteousness it is sometimes necessary to bring about deliberately an emotional stir-up" (p. 35). Upon unfreezing, the powerful draw of a conventional solution—adopt either edTPA or PPAT--hovered as a realistic, seemingly sensible option. However, the Secretary's comment at the VCTE meeting acknowledged the legitimacy of the deeper values and beliefs about learner-centered education in Vermont. The contours of an emergent policy narrative were molded upon this setting.

Plot

The primary action in our case occurred during the design phase. The experience of the design phase corresponded with Lewin's (1947) second stage of group development, the *moving* stage, when a change process exhibits a shift that is often accompanied by tension. Each period of the long design phase represents a chapter in the developing policy narrative (see Table 2). In the subsections below, we explain each chapter of the plot, describe one or more benchmark episodes that are representative of the chapter's tensions, evaluate the beliefs and strategies that various characters enacted to resolve those tensions, and analyze the contribution of that chapter's narrative theme to the overall narrative. Readers will notice that we frame the case's overall narrative as a system composed of the specific narrative themes that emerged from each chapter of the plot.

Table 2
Timeline

Dates	Event	Setting	Plot
June, 2013	VSBPE adopts the Core Teaching Standards based on InTASC	Discovery Phase (unfreezing)	
Fall, 2014	AOE makes presentation to EPPs		
April, 2014	VSBPE hears presentations on edTPA and PPAT; two EPPs conducts trial of PPAT;		
May, 2014	VCTE meeting with Secretary of Education		
June, 2014	PRC Meeting #1	Design Phase (moving)	Chapter One: Ideal vs. Practical (forming)
July, 2014	PRC Design Group A & B		
August, 2014	PRC Design Group A & B		
September, 2014	PRC Meeting #2 and Meeting #3		
October, 2014	PRC Meeting #4		Chapter Two: Opportunity vs. Imposition (storming)
November, 2014	PRC Meeting #5		
January, 2015	PRC Meeting #6		
February, 2015	PRC Meeting #7		
March, 2015	PRC Meeting #8		
April, 2015	PRC Meeting #9 Status Update for VSBPE		Chapter 3: Collaboration vs. Cooperation (norming)
May, 2015	PRC Meeting #10		

Table 2 cont. *Timeline*			
June, 2015	VSBPE approves the VLP	Design Phase (moving)	Chapter 4: Community vs. Committee (performing)
July, 2015	PRC builds VLP website		
August, 2015	Preparation for pilot year		
September, 2015	PRC Meeting #11: Pilot launched		Chapter 5: Transformation vs. Transition (adjourning)
October 2015 - June 2016	October 2015: Meeting #1 EPIC; June 2016: VSBPE approves revisions derived from pilot;	Pilot Phase (freezing)	

Chapter One: Ideal versus Practical. Meeting #1 of the PRC was the first of eleven formal meetings of that Committee. Attendees included members of most of the state's sixteen EPPs, staff members of the AOE, and two members of the VSBPE. The meeting began with a discussion about the need to replace the L1LP and presentations on the two generic assessment products. Minutes indicate the following discussion points, among others: the commercial products required candidates to pay significant fees and to pay additional fees if their submissions required revisions; candidates would not receive guidance or formative feedback for their submissions; and, the validity and reliability protocols of the generic products were not assured as suitable for the distinctive educator preparation programs in Vermont. Participants quickly migrated to the belief that we could create a portfolio process and calibration system that was personalized, cost less and required fewer resources, that was adaptable across all EPPs, and that would sustain the state's foundational approaches to educator preparation. Instead of a generic product, we would create a customized process. Even knowing that a recommendation to design a new state-based replacement would require an immense effort in a time-bound project, the membership made a cautious commitment to a shared idea. As noted by one of the participants, "VCTE will need to take the lead and offer its time and energy, otherwise, it is likely that the decision will be made for us and that decision will likely be a national portfolio."

Without fanfare, the membership voted unanimously, by a show of hands of all those present, to recommend the implementation of a new state-based replacement for the L1LP. The candor of the minutes is telling: "Show of hands indicated unanimously that the group wanted to create a home-grown version of the Level 1 Candidate Portfolio and not use a national assessment at this point." To some readers, it might seem odd that such a consequential decision could be made by a simple show of hands, with everyone present having an equal vote. Yet, this is Vermont, where the Town Meeting remains a norm, and where that is routinely how consequential decisions are made. No one present, or absent, would doubt the legitimacy of the decision.

The vote was followed by a brainstorming session from which three potential approaches to the work ahead emerged. Each of these approaches constituted a means for developing the new

portfolio; however, the first two approaches started with conceptualizing the outcome design of the portfolio, while the third approach imagined a design process that began with reconsidering the purpose of the portfolio. The first approach envisioned achieving a new portfolio by, essentially, maintaining the structure and format of the L1LP but substituting the InTASC-based VCT Standards for the 16 Principles. This approach was deemed *practical.* The second approach envisioned the new portfolio as a candidate-driven endeavor: Each candidate would study the VCT Standards, then construct a product demonstrating their performance and analyzing their achievement. Under this approach, the design process would involve the construction of guidelines, examples, and tutorials for candidates and reviewers. This approach split the assemblage: some perceived it as deeply *authentic*, while others foresaw confusion. The third approach began with a conversation about the value of an evidence-based portfolio and led to a set of guiding principles for managing the design process. Those design principles included (1) making a commitment to using a backward design process (Wiggins & McTighe, 2005) beginning with a reconsideration of the purposes of the portfolio; (2) using the InTASC Progressions, which support the Standards, as performance benchmarks for our candidates since they are closer to actual practice; and, (3) creating an assessment process that, beyond being a mere tool for measuring performance, was also educative and pedagogically valuable for candidates, programs, and the educator preparation community. Together, these principles would align the design process with the state's foundational, learning-centered approach to education and assessment. This approach suggested a grand vision for reorienting the notion of a licensure portfolio: What if we treated the portfolio itself as an actualization of a theory of candidate preparation?; What if we initiated a statewide participatory action research project including candidates, EPPs, the AOE, and the VSBPE to conduct ongoing formal inquiry into that theory of candidate preparation?; What if we wanted to create an experience that candidates deemed worthy of their time and energy? The third approach was deemed *ideal:* members favored the idea but fretted about achieving a broadscale agreement and a workable product within the constraining timeline. After some discussion, the group called for two subcommittees of volunteers to develop the first and the third approaches into formal proposals. The second approach was tabled without complaint. The subcommittees, Design Group A (first approach) and Design Group B (third approach), were to present their proposals to the educator preparation community at a follow-up meeting in three months.

The three authors of this paper along with another member of the PRC formed Design Group B. As we met over the summer to craft the proposal for Design Group B, we realized that the strength of our guiding principles created a theoretical framework that could lead, beyond revision, toward an innovative vision for educator preparation across the state. As per our meeting minutes, one of us noted, "We're in the process of designing something new and original." Instead of a detailed blueprint for a new portfolio, the proposal offered an outline of a deliberative process for discussing our collective aims for the portfolio based around a loose conceptual structure: Candidates would examine the InTASC Performance Criteria, collect evidence of their performance related to them, analyze that evidence using scholarly literature, and critically evaluate their performance. Believing that a vibrant and useful product would emerge from the knowledge and practices of our profession, we proposed a series of dialogues to examine past experience, scholarship and evidence, and an interpretation of the standards. A Design Team would pose questions, facilitate discussion, maintain notes, and construct iterations as they emerged. The Team's primary role would be to nurture the design by encouraging participants to engage in an inclusive deliberative process, to maintain a commitment to the grand vision of creating a portfolio experience that was pedagogically valuable, to contribute strenuously to each discussion, and to remain open to possibility (See, Arrien, 1993). In retrospect, these are the elements that launched

our dangerous outpost (Dewey, 1922/1983, p. 334). That is, by implementing a systematic process based on a shared goal we were invoking the dangerous possibility that teacher educators would become fully engaged *democratic professionals* (Dzur, 2008) who regularly seek agency within the contested terrain of educational policymaking. Similarly, by emboldening preservice teachers to conduct critical and grounded self-evaluation, we were creating an outpost from the contemporary trend to mechanize the assessment of licensure candidates. While our proposal included specifications drawn from the literature on assessment and the use of research methods to establish validity for the new portfolio, a discussion of those details and how they affected the final product is the subject of a different article. Our purpose here is to examine how the narrative about the portfolio emanated from the design process.

During the follow-up meeting in September, Meeting #2, the process proposed by Design Group B was accepted by the educator preparation community, again by a show of hands of all those present. At that point, three members of Design Group B, the three authors of this article, became the Design Team of the PRC (scheduling conflicts prevented the fourth member of Design Group B from joining the Design Team). Meeting #3 occurred one week after Meeting #2. That meeting included a careful review of the VSBPE charge, a review of the accepted proposal, and a launch into the deliberative work of fashioning a consensus. These three meetings denote the first period of the design phase, and Chapter One of the plot, with Meeting #3 also serving as a transition into the second period.

Whereas the paragraphs above describe the key episodes of Chapter One, in accordance with the NPF we now turn to an evaluation of the beliefs and strategies that emerged from the action of this chapter. As noted, Chapter One reveals that instead of formal coalitions competing for their preferred outcomes, the two subcommittees played characteristic roles evoking a fundamental tendency that is typical of what Tuckman (1965/2001) and Tuckman and Jensen (1977) refer to as the *forming stage* of a collective problem-solving task. As such, Chapter One contributed a key narrative theme to the plot line: the narrative tension between the ideal and the practical (see Table 2). Practically, with only a year to design a new portfolio, it would seem most prudent to maintain the procedures of the L1LP and swap the standards. But, ideally, the community was presented with an opportunity to unite behind the creation of an innovative process that could serve our candidates and community better. The tension identified by this narrative theme re-emerged regularly during the design phase. In most instances, the allure of innovation inspired the members of the PRC to continue striving for higher aims, even when modified by the draw of practicality. As such, this theme helped to establish the case's plot line as a quest narrative. Subsequent chapters reveal themes that contributed to our understanding of the attributes of that quest.

Chapter Two: Opportunity versus Imposition. Spanning Meeting #3 through Meeting #8, the second period of the design phase produced initial versions of the new portfolio as members pondered possibilities and began constructing and revising ideas. This phase was marked by a recurring set of challenges, each imbued with its own tension. The challenges appeared as dialogic episodes within the maturing plot, which we refer to here as *challenge dialogues*. They were not strictly incited by particular characters or organized coalitions. Instead, they were manifestations of deeper sentiments inherent within the change process itself, which is indicative of the *storming stage* of a group's developmental process (Tuckman, 1965/2001; Tuckman & Jensen, 1977). Four examples of these challenge dialogues are presented in the subsections below, followed by our evaluation of the dominant strategies and beliefs, and our analysis of the chapter's theme.

Engagement challenge. During Meeting #4, representatives from one EPP claimed that a state-based portfolio would under-serve their out-of-state students who would have difficulty transferring their VT licensure to states requiring one of the generic products. Similarly, another

EPP initiated a dialogue during Meeting # 5 claiming that whatever the PRC developed would not serve their candidates' specific, specialized endorsement area. They noted, "the [current] educator portfolio does not address the nuances and job descriptions of the majority of [our candidates]." Instead of fully accepting the responsibility inherent in the deliberative design process to imagine the possibilities of a new portfolio that would serve a full array of candidates, these two dialogues highlighted the sort of insider and outsider divide that Merton (1972) described as inhibitive of social cohesion, for which the solution is greater engagement.

Efficiency challenge. Even as the work on the project indicated that the base version of the new portfolio would entail a significantly reduced workload in comparison to the L1LP, and even when data were presented to support this claim, and even as examples were produced to demonstrate the feasibility of the new version, almost every meeting during this period included discussions about the burden of the emerging product. For example, one participant in the PRC sent an email to the EPP community midway through the design phase that raised the question directly: "Is this a manageable portfolio for the candidates in your program?" Another example of a dialogue related to this challenge area pertained to the calibration system for assuring validity and reliability of the portfolio. Since the L1LP did not include a formal, statewide calibration system, many participants in the PRC were understandably anxious to determine an efficient calibration system for the new portfolio; that is, one that would be both workable and useful for all stakeholders. Beginning with Meeting #3, this challenge dialogue permeated the design phase. A turning point for this dialogue occurred during Meeting #6 when two groups of PRC participants initiated an off-agenda discussion about their ideas for a calibration system, though the portfolio had not yet been finalized. One proposal was a preliminary outline from a subcommittee of the PRC that had been formed to investigate research on portfolio calibration. The other came from members of the AOE who, wearing their regulatory caps, had created a scheme drawn from models of other candidate portfolio systems. Both proposals were coherent but limited the potential for the portfolio to act as a pedagogical tool for candidates and programs, and both required additional, unfunded resources. They each required the establishment of an external review board with authority for vetting and scoring candidates' portfolios, one composed of members of the EPPs, the other of members of the AOE. As such, they demonstrated, at best, *assessment of learning* instead of *assessment for learning* (Black, Harrison, Lee, Marshall, & Wiliam, 2004), and so were not aligned with the design principles established by the Design Group B and approved by the PRC. A tense discussion ensued until a third proposal was placed before the committee. That proposal, initiated by the Design Team, offered an innovative yet more conducive vision: a system for establishing the collaborative review of portfolios through a post hoc calibration system that would provide formal feedback for each program, and across all programs, yet maintain management and review of individual candidates' portfolios within their home EPP. As noted during the meeting, this proposal "follows the design of the instructional priorities of the portfolio." The participants favored the third proposal, thereby resolving this challenge dialogue.

Commitment challenge. After the tense dialogue of Meeting #6 was resolved, it appeared that a final version was emerging and gaining broad acceptance within the PRC. Nevertheless, during that meeting, some members noted that the charge from the VSBPE required a complete initial draft of the proposed portfolio to be presented at their meeting in April. Feeling pressure to demonstrate widespread approval of a final product in advance of the April deadline, the PRC issued a call for comments on the latest version of the portfolio, which was Version 5. While, typically, representatives from the sixteen educator preparation programs attended the PRC meetings and formed a core group for vetting and shifting the versions, this call was broadcast by email to the

entire educator preparation community. As it happened, the tone of the call was pointed and urgent, conveying, perhaps, even a sense of impending dread of the approaching deadline.

The call generated a mass of replies. The compilation included positive comments and clear suggestions, mostly editorial. However, the call also produced a large number of comments that were far afield, including notable misunderstandings about the process, and many unpolished, pointed criticisms. Collating and crafting replies to the comments--the informed, the wayward, and the unseemly--consumed considerable time. The Design Team addressed this challenge dialogue by treating each comment with an assumption of positive intent, which helped to strengthen our resolve. Eventually, we came to see that this episode represented a crux point in the design phase. At just the point where consensus began to emerge within the Committee, the social process evoked a striking challenge from the broader community, many of whom were not regular attendees of the PRC. Interestingly, the challenge was sparked by the tone of the PRC's call as a sort of self-revealing queasiness about crossing from the comfort of critical detachment to the conviction of true commitment.

The challenge was evident during Meeting #7 when the PRC addressed the broad themes of the commentary through a series of questions such as the following: "Are there too many pieces of evidence?" "Is the portfolio the penultimate demonstration of competence?" and, "Can students concentrate on all elements of their professional preparation while they are working on the portfolio?" While seemingly reasonable questions, taken together they demonstrate a tone that challenges the progress made to this point. As members of the Design Team, we recognized that the strongest tool for moving through such a crux point is flexibility. Instead of arguing for or against any specific criteria, we simply joined the conversation, recorded notes, and collected ideas for compiling another version of the final product, which we presented during Meeting #8—addressed in Chapter Three.

Philosophic challenge. The philosophic challenge was demonstrated by dialogues that contested the core premises of the emerging versions of the portfolio, directly or indirectly. For example, during Meeting #3, some members insisted that the VSBPE's charge required that all candidates' portfolios be identical across all programs in format and structure so as to eliminate bias and allow for easy scoring. However, a close reading of the charge revealed that it did not include such requirements. Instead, it simply provided a set of questions for the PRC to consider, including "What will be the initial and ongoing system for calibrating the portfolio reviewers?" As the membership examined the charge carefully, this challenge dialogue subsided.

Other philosophic challenge dialogues were more fundamental or theoretical. One contended that the portfolio should permit creative formats, including spoken word or visual arrangements absent textual material. Another maintained that all programs should adopt a common electronic platform to ease cross-state scoring and comparisons. A third, which occupied much of Meeting #7, powerfully questioned the legitimacy of portfolios as a viable assessment tool for candidate preparation, insisting that teaching is too human-oriented and context-bound to be measured through any device other than live interaction. Each of these challenges was addressed and resolved through deliberations within the meetings.

The four challenges were typical of this period. In analyzing the beliefs and strategies inherent across these challenge dialogues, it is helpful to reiterate that participation in the PRC was open during the entire design phase. As such, attendance from meeting to meeting was variable. Consequently, any particular point of deliberation or contention could be raised on numerous occasions as new attendees arrived at a meeting. Though under these norms, all voices could be heard, nonparticipation reduced opportunities for input. In order to address this concern, the PRC produced detailed minutes of every meeting that, along with every iteration and question about the portfolio, were distributed to an email list containing over 150 addresses encompassing stakeholder

groups. As well, the membership of the Design Team was open but remained constant throughout this period, which provided consistent direction for the process. The Team presented updates, gathered reactions, questions, and concerns, facilitated the challenge dialogues, and reworked the portfolio through six major versions. At least one of us attended each statewide meeting, bi-monthly Team meetings, and regular status update meetings with the VSBPE. The Design Team, in essence, became a central protagonist in the plot. As a result, we regularly found ourselves in a position of addressing the challenge dialogues as they emerged. Most were resolved as the Design Team regularly reminded members that they were invited to draft suggested adjustments to the text and requirements of the portfolio to suit their program's needs, and to air them for public review. Our strategy demonstrated a belief in an inclusive approach to consequential decision-making and probably helped to create confidence in the process.

Challenge dialogues persisted throughout this period and might still lay dormant. Altogether, these dialogues served as vehicles for a fundamental question underlying the developing narrative about the purpose and value of the new portfolio: Would the portfolio be an imposition or an opportunity? We came to recognize through this case analysis that our actions on the Design Team promoted commitment to the design process itself, remaining open to the outcomes that would emerge, thereby advancing the theme of opportunity.

Chapter Three: Collaboration versus Cooperation. In the third period of the design phase, group interpersonal relations began to coalesce and operations became more fluid as roles, expectations, and parameters gained clarity, as one would expect in a *norming stage* of a group's development (Tuckman 1965/2001; Tuckman & Jensen, 1977). While coding the data on the timeline, we each quickly identified the same benchmark point in the case that exhibited such qualities. As noted above, after Meeting #6, a series of challenge dialogues occurred through email and again within Meeting #7. Resolving these dialogues included considerable communication and led to Version 6 of the portfolio. We were not certain of the prospect for Meeting #8 when the Design Team was to present Version 6 to the PRC. As it turned-out, three potential challenge dialogues erupted during the meeting: one about scoring, one about composition requirements for candidates' writing, and one about the layout of the rubric. Each of these challenges was resolved almost immediately as members of the PRC other than the Design Team took the lead in weighing them in consideration of the overall aims of the portfolio.

The coalescing process was further advanced when the PRC made a formal presentation of the plan for the new portfolio to a subcommittee of the VSBPE in April 2015. The PRC received positive feedback following the meeting, as demonstrated in this note from the VSBPE:

> The presentation met the charge by the VSBPE very well; the presentation was
> efficient and effective; it was an excellent overview of the hard work; great turnout by
> the colleges/universities to support the work; beyond expectations for presentation
> (concise, well represented, thorough, explanatory in quite a short presentation); the
> hard work of this committee is clear; this has clearly been a collaborative process – the
> programs have really worked well together and see it as enhancing their own
> professional development; (EPIC) proposal makes it clear how reliability, validity, and
> bias will be addressed. [The chair] finished by telling the group the work was inspiring.
> (personal communication, 4/13/15)

Finally, Meeting #9 marked the conclusion of Chapter Three, during which members of the PRC other than the Design Team led break-out discussion sessions about the final version and began planning for implementation.

Noting the distribution of leadership roles for problem-solving and presentations demonstrated by members of the PRC, the beliefs and strategies evaluation indicates a theme of

collaboration, stretching beyond mere cooperation. Hoyt (1978) (in Hord, 1986) provides the following reference to distinguish the two:

> Collaboration is a term that implies the parties involved share responsibility and authority for basic policy decision making. … Cooperation, on the other hand, is a term that assumes two or more parties, each with separate and autonomous programs, agree to work together in making all such programs more successful. (p. 22)

Through the challenge dialogues recalled here, Chapter Three served as a major transition point in the case, creating a means for achieving the Committee's desired end.

Chapter Four: Community versus Committee. The fourth period of the design phase was marked by the climax of the case. Early in May 2015, the PRC made a formal presentation of the proposed, final version to the full VSBPE. The PRC orchestrated this presentation, intentionally including equal roles for many members. Each member presented a different element of the proposal, demonstrating broad understanding and acceptance. In late May, the PRC held Meeting #10 during which we constructed a comprehensive digital handbook for the new portfolio, now titled the Vermont Licensure Portfolio (VLP), each member volunteering to write specific portions of the handbook. In their June 2015 meeting, the VSBPE planned to conduct a formal vote on the proposal: A remarkable episode occurred during this meeting. Since the PRC was not scheduled to provide a presentation, only three members of the PRC attended, only one from the Design Team. Due to the unexpected cancellation of other agenda items, suddenly there was additional time in the meeting schedule. Apparently feeling magnanimous, the Board chair invited the three members of the PRC to extemporaneously provide a presentation on the VLP before the vote. Instantly, and without consultation among themselves, the three individuals launched into a comprehensive overview of the VLP and the calibration system with details, examples, and digital slides prepared and shared throughout the design phase. The demonstration of shared understanding was convincing. After the presentation, the VSBPE voted unanimously to approve the VLP and the accompanying calibration system.

Taken together, these episodes exhibit the qualities of the *performing stage* of group development (Tuckman 1965/2001; Tuckman & Jensen, 1977). Analyzing the beliefs and strategies of this period of the design phase reveals achievement of a longstanding aim of the Design Team and exhibits the theme of Chapter Four: The PRC had begun operating more so as a community of scholar-practitioners, instead of merely members of an ad hoc committee.

Chapter Five: Transformation versus Transition. The final period of the design phase marked the conclusion of the PRC and the resettlement of the energies required to complete the quest as members moved on to other duties. Tuckman (1965/2001) and Tuckman and Jensen (1977) label this stage of the group process *adjournment*.

At Meeting #11, in September 2015, the PRC made a formal presentation of the VLP to a large gathering of stakeholder groups, including all EPPs, and conducted breakout workshops for preparing program-specific implementation plans. The meeting was opened by a senior member of the AOE who had been present at Meeting #1. She praised the work of the group and, acknowledging that she was new to Vermont and new to her position at the time of Meeting #1, admitted that she was confident at that time that the group had exceedingly underestimated the difficulty of designing and developing a new assessment system that would obtain statewide acceptance within a year. Now, seeing the accomplishment, the tone of respect and camaraderie among the PRC, and the rigorous aims of the product, she admitted astonishment.

Meeting #11 was also the beginning of a pilot year during which a few EPPs volunteered to implement the VLP while collecting data on the experience. For many members of the PRC, pleased

with their accomplishment and happy to be relieved of the extra volunteer hours, this point signaled celebration and transition. For them, the next step was to implement the new portfolio. However, several members of the PRC, including the members of the Design Team, formed a new group to usher the VLP through the pilot year and to inaugurate the calibration system through a statewide partnership between the EPPs and the AOE. This venture was an original enterprise for the state's educator preparation community since the L1LP was managed separately by each EPP in association with the AOE as a regulatory force. The new group, the Educator Preparation Inquiry Collaborative (EPIC), met in October 2015 to organize itself as an independent scholarly association with the mission to conduct formal inquiry of the educator preparation process, beginning with the VLP. The formation of EPIC, for the purposes of our beliefs and strategies analysis, established the theme of Chapter Five as transformation versus transition. Instead of launching the VLP as a static, stand-alone assessment product, the ongoing support, inquiry, and critique supplied by EPIC represents a continuation, yet transformation, of the collective endeavor to achieve the higher aims of the educator preparation community. This transformation exemplifies the *freezing stage* of Lewin's (1947) stages of group development, which is marked by the establishment of conditions that secure "permanency of the new level" (p. 34) of group performance.

Solution

According to the NPF (Shanahan, Jones, & McBeth, 2011), analyzing a policy narrative includes examining the solutions proposed by advocacy groups to the policy problem, which set the tone and direction for the plot. As noted previously, instead of formal coalitions in competition for a preferred outcome, our case revealed a slow coalescence of a disparate group self-organizing to achieve a common aim. As such, seeing the driving solution requires greater discernment. On the surface, the target solution, in this case, was a workable recommendation for a viable replacement for the L1LP. However, the analysis revealed two deeper constructs that, at various points for different actors, served as the actual solution motivators driving the development of the narrative about the PRC and the direction of the VLP. One of these motivations could be termed the *anything but* solution. Members of the PRC were aware of the value and limitations of the generic assessment models, primarily through a pilot conducted by two EPPs. Nevertheless, the driving force supporting any consideration of the option to adopt one of those models was a sense of inevitability. This sense of inevitability has been recognized in the field: "In other words, the rhetoric behind the edTPA could be interpreted as: everybody is doing it, shouldn't you join in, too?" (Reagan, Schram, McCurdy, Chang, & Evans, 2016, p. 15). Conversations within the PRC confirmed recognition that employing either generic model would be antithetical to the foundational beliefs and norms about teaching, learning, assessment, and program improvement that permeated the history of the state, as described previously. As one member of the PRC commented after conducting a thorough review of material promoting edTPA, "Let's not get spooked into thinking a national portfolio is already widespread, much less inevitable." Hence, one potential solution motivator was to pursue anything but one of the generic models.

The second motivator could be characterized as the *grand vision* solution. Of the two initial design proposals presented during Meeting #2, the one that was approved was steeped in a powerful vision for educator preparation (i.e. What if we treated the portfolio itself as an actualization of a theory of candidate preparation?; What if we initiated a statewide participatory action research project including candidates, EPPs, the AOE, and the VSBPE to conduct ongoing formal inquiry into that theory of candidate preparation?; What if we wanted to create an experience that candidates deemed worthy of their time and energy?). The approved proposal was presented to the community under a variant of this framing, while the other was framed as straightforward and

stabilizing. Throughout the design phase, the *grand vision* framing became stronger and the *anything but* framing receded. When the VSBPE approved the proposal for the VLP, the Chair of the Board recognized the scope and scale of the project they had just adopted with an informal comment: "If you can pull this off, it will be a great thing for the state of Vermont." The grand vision solution was fully present when the VLP was introduced to the educator preparation community during Meeting #11 in September 2015. Indeed, the PRC encouraged participants to consider the new portfolio an opportunity to initiate a quest for a theory of educator preparation.

Discussion

In the discussion section, we address generalizability, provide an interpretation of the case, discuss theoretical contributions of the study, and address the significance for the field. We initiated this study to gain insight into the workings of a specific policymaking project, wondering what we could learn as teacher educators and participant observers from our delve into the policymaking arena. As teacher educators, policymaking seemed a distant land. Yet, as participant observers in the project described in this article, we came to see that this territory is accessible when conditions are favorable. Though the case described is context specific and does not demonstrate generalizable outcomes, the insights we gained will be of interest to teacher educators, regulators, and policymakers concerned with lasting educational change.

From a policymaking standpoint, we recognize that there are features specific to Vermont that made this policymaking project possible. These include a culture of participatory governance, a history of state-based initial licensure assessment portfolios, a Secretary of Education who comes at questions of accountability from a progressive stance, and an independent, teacher-majority policy board that includes teacher educators. Though there were conditions that allowed this work to proceed, the project progressed because a group of teacher educators volunteered to carry it through as scholar-practitioners, without compensation, funding, or formal recognition. Such conditions are not universal. In each situation, teacher educators will need to find their own way, knowing that there is a "crack in everything" (Cohen, 1992). This might mean building coalitions to advocate at the state policymaking level to find an opening for teacher educators' voices to be heard. In Vermont, maintaining and sustaining the VLP will continue through the partnership established within EPIC.

Examples of these kinds of coalitions are starting to emerge in other states. For example, in New York a collective of teacher educators from institutions across the state joined together to examine the impact of the state's adoption of edTPA (Tuck & Gorlewski, 2016). The collective's goal was "to foster new critical dispositions as a means of interrupting/intervening in hegemonic structures" (p. 206). One outcome of the collective's work is an alternative edTPA scoring tool that "makes explicit reference to issues of race, dispossession, power, and privilege in the classroom" (p. 212). It is through such coalitions of teacher educators that a new kind of accountability is emerging, one that reflects the grassroots efforts of teacher educators to focus on what is essential in preparing future teachers. Cochran-Smith et al. (2017) call this movement democratic accountability in that teacher educators are involved as stakeholders in the process of decision making and also hold themselves accountable for preparing teachers who are focused on equity and committed to preparing students to participate in a democratic society. The case described in this article provides one example of the practice of democratic accountability. Imagine, next, a network of dangerous outposts.

Viewed as a narrative, we came to see the case as a story about what happened when a group of people who had little previous association with each other faced an event that dismantled their professional lifeworld (the VSBPE's adoption of the InTASC Standards resulting in the elimination

of the L1LP). To re-establish order, they could choose one of three paths: move away from their historic moorings, transplanting themselves into a different belief system (adopt one of the generic, commercial models for candidate assessment); rebuild their old world with new bricks (maintain the L1LP by replacing the 16 Principles with the InTASC Standards); or, venture into the unknown in a quest for an elusive and ill-defined but auspicious aim (build a new portfolio based on a grand vision). They chose the latter. Along the way, they encountered a series of challenges that tested their mettle, stamina, and conviction.

Studying the experience as a narrative enabled us to see it broadly. For example, while at first it appeared to us, as participants in the quest, that the case was an isolated event, we came to see it within a continuous developmental stream. The choice to forgo the generic assessment products was as much about local cultural forces compelling the PRC to sustain the foundational philosophy of learner-centered education within the state as it was about avoiding the tempting embrace of a popular trend. As a customized assessment system, the VLP is the next iteration of a long quest to create more meaningful arrangements for candidate learning. Instead of capitulating to market forces, the PRC chose to continue the tradition in the state of going their own way.

Additionally, a broad view allowed us to see our collective role on the Design Team as a central protagonist in the story, though such a leadership role was neither dictated nor foretold. Along with the other members of the PRC, we did not know the end that would transpire. We did, however, recognize early in the process the potency of the convergence across the design principles proposed during Meeting #1. Dedication to those design principles, the way an entomologist would remain steadfast to the scientific method or a physician to the Hippocratic Oath, secured our trust in the educative process itself to escort the journey.

Another benefit of a broad perspective is that we came to see the experience as contributing to a macro-level reframing of the current era of educational reform. As noted previously, teacher educators have dedicated considerable scholarly effort toward improvement of the field. As well as being a demonstration of the benefit of the scholarship of application (Boyer, 1990), these studies embolden a strength-based narrative as a counter to this era's deficit-oriented narrative of mechanical accountability that dominates discussions about education at all levels. As indicated by the NPF, a policy narrative needs a proposed solution as well as a setting, plot, and characters. Our case contributes to the literature on teacher educator-led inquiry into the profession by demonstrating, in particular, how a grand vision in conjunction with principles of learner-centered reform served as a proposed solution that helped us pilot a policymaking narrative toward improvement of the profession instead of for mere measures of accountability.

Examining this case through the lenses of lifestory analysis (McAdams, 1993), Lewin's (1947) theory of institutional change, and Tuckman's (1965/2001) and Tuckman and Jensen's (1977) theory of group dynamics enabled us to discern the narrative dynamics of meso-level policymaking. For our case, these methods were helpful as viewfinders. As such, this case and these grounding theories, contribute broadly to the field of narrative policy studies. McBeth, Jones, and Shanahan (2014) asked for contributions in the spirit of the emergent nature of NPF noting: "We have a lot of work to do, and we enlist your help. We hope policy process scholars will assist in fanning out to test NPF hypotheses in different policy contexts" (p. 256). A substantive contribution of this case to the field of NPF is that we did not find the competing coalitions hypothesized by McBeth, Jones, and Shanahan (2014). Instead, we found a single fellowship formed through a quest to achieve a seemingly unattainable common goal, along the way battling competing internal group dynamics about the meaning of the enterprise.

In the end, the narrative significance of this case study for the field of educator preparation policymaking is hope. Snyder's (2000) *Theory of Hope* provides a useful heuristic to further examine

this notion. In the vein of positive psychology, Snyder posits that hope, as a driving emotion, is the result of action. It requires, first, centering on a goal with high outcome value. Then, hope requires a coherent system: agency, a perception that you can begin and can persevere; a pathway, awareness of a feasible route to reaching the goal; and, feedback, outside recognition of movement toward the goal, despite barriers, that outweighs negative messages. We believe that it was the process of hope that guided this policymaking project toward success.

Upon the admirable confidence of the VSBPE, which handed an open charge in a risky climate, to a loose assemblage of enthusiastic professionals, who were nevertheless amateurs in the policymaking arena, the PRC surged forward in pursuit of an important, common goal. The openness of the charge and the comprehensive structure of the PRC supported agency. By working in partnership, teacher educators, regulators, and policymakers created a pathway for inclusive policymaking that allowed for multiple voices to be heard through a chaotic but genuine feedback process, which is an aspirational aim of the field (see Tatto et al., 2016).

Hope emerges from conditions, actions, and accomplishments to spur perseverance. This is the foundation upon which a dangerous outpost is built in service of humane experiences for the re-enchantment of citizenship. The danger in our outpost is the collective confidence to establish a humanistic forum for meaningfulness in times that value mechanization. Berman's (1981) comments on the outcomes of a mechanistic worldview were prescient: "The logical end point of this world view is a feeling of total reification: everything is an object, alien, not me; and I am ultimately an object too, an alienated 'thing' in a world of other, equally meaningless things" (p. 17). Consider instead, in our case, the volunteer time from professionals across sixteen educator preparation programs and a state agency. Consider the voices, the versions and iterations, the craggy, crowded unheated or overheated meeting spaces when the technology crumbled, again. Consider the candidates, the students they will teach, and the parents and caregivers they will consult. The outcome of this project—the VSBPE's unanimous approval of the VLP—depended upon civic care and a shared goal. As the case demonstrates, though the terrain remains contested, efforts in the continuing construction of a dangerous outpost for the Green Mountain State will be sustainable by and through a narrative of hope.

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Acknowledgements

About the Authors

David J. McGough
Northern Vermont University
david.mcgough@northernvermont.edu
David McGough, Ph.D., is a Professor of the Social Foundations of Education and Education Research in the Education Department, and is Co-Director of the Educator Preparation Inquiry Collaborative. Formally a secondary math and computer science teacher, department chair, and licensure officer, he studies teacher education, practitioner inquiry, and educational policy.

Claudine Bedell
Saint Michael's College
cbedell@smcvt.edu
Claudine Bedell, Ed.D., is an Associate Professor in the Education Department, Graduate Director, and is Co-Director of the Educator Preparation Inquiry Collaborative. Prior to her work in higher education, she was a middle school science and language arts teacher. Claudine's research interests include personalized learning, teacher preparation, and classroom-based and large scale assessment.

Barri Tinkler
University of Vermont
barri.tinkler@uvm.edu
Barri Tinkler, Ph.D., is an Associate Professor in the Department of Education at the University of Vermont. Her research interests focus on service-learning in teacher education with an emphasis on social justice. She serves on the editorial board of the *International Journal of Research on Service-Learning in Teacher Education.*

About the Guest Editors

Elena Aydarova
Auburn University
eza0029@auburn.edu
Website: https://elenaaydarova.com
Elena Aydarova is Assistant Professor of Social Foundations at the Department of Educational Foundations, Leadership, and Technology at Auburn University. Her interdisciplinary research examines the interactions between global social change and the work of teachers, teaching, and teacher education through the lens of equity and social justice. Her projects have explored teacher education reforms in Russia and the US, internationalization of education, teacher retention, as well as privatization of teacher preparation. She has recently completed a book manuscript "Teacher Education Reforms as Political Theater: Policy Dramas in Neoliberal Contexts." Throughout her career, Dr. Aydarova has taught in the United States, Ukraine, China, and the United Arab Emirates.

David C. Berliner
Arizona State University
berliner@asu.edu
David C. Berliner is Regents' Professor Emeritus of Education at Arizona State University. Dr. Berliner is a member of the National Academy of Education (NEA), the International Education Academy (IEA), a Fellow of the Center for Advanced Study in the Behavioral Sciences, and a past president of both the American Educational Research Association (AERA) and the Division of Educational Psychology of the American Psychological Association (APA). He is the recipient of awards for distinguished contributions from APA, AERA, and the National Education Association (NEA). Dr. Berliner is co-author (with B. J. Biddle) of the best seller *The Manufactured Crisis*, co-author (with Ursula Casanova) of *Putting Research to Work*, co-author (with Gene Glass) of *50 Myths and Lies that Threaten America's Public Schools*, and co-author (with N. L. Gage) of six editions of the textbook *Educational Psychology*. He is co-editor of the first *Handbook of Educational Psychology* and the books *Talks to Teachers,* and *Perspectives on Instructional Time*. Professor Berliner has also authored more than 200 published articles, technical reports, and book chapters. He has taught at the University of Arizona, University of Massachusetts, Teachers College and Stanford University, as well as universities in Australia, Canada, The Netherlands, Spain, and Switzerland.

Please send errata notes to Audrey Amrein-Beardsley at Audrey.beardsley@asu.edu

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