

THE NATIONAL DEMONSTRATION PROJECT

Aims and Scope

The National Demonstration Project, supported by a four-year grant of \$2.5 million from the DeWitt Wallace-Reader's Digest Fund, aims to demonstrate the feasibility of adaptations of the Institute's approach at several other sites. It directs its attention to sites where school systems serve a significant number of students from low-income communities, but where the pattern and magnitude of needs and resources are different from those that obtain in New Haven, and where significant opportunities exist, without varying from our approach, for devising local strategies in meeting those needs. From March 1998 through January 1999, in accordance with its proposal to the DeWitt Wallace-Reader's Digest Fund, the Teachers Institute accomplished the following preparatory steps.

The Project aims to demonstrate the feasibility of adaptations at several other sites.

It invited fourteen sites to submit proposals for 8-month Planning Grants. It provided to those sites initial information concerning the Institute's policies and procedures. It supervised the awarding of Planning Grants on recommendation of a National Panel to five of the seven applicants: a partnership among Chatham College, Carnegie Mellon University, and the Pittsburgh Public Schools; a partnership between the University of Houston and the Houston Independent School District; a partnership between the University of New Mexico and the Albuquerque Public Schools; a partnership between the University of California at Irvine and the Santa Ana Unified School District; and a partnership between the University of California at Santa Cruz and The Pajarito Valley Unified School District. The Teachers Institute provided for the sites that received Planning Grants a "July Intensive" that enabled a practical immersion in the processes of the Institute.

On recommendation of a National Panel and on the advice of the program officer of the DeWitt Wallace-Reader's Digest Fund, and after further negotiations with certain sites, the Teachers Institute awarded 3-year Implementation Grants to four applicants: Chatham College, Carnegie Mellon University, and the Pittsburgh Public Schools; the University of Houston and the Houston Independent School District; the University of New Mexico and the Albuquerque Public Schools; and the University of California at Irvine and the Santa Ana Unified School District. The Teachers Institute then began, in part through a January Orientation Session, to work with the Grantees on their plans for the coming years.

The Grant from the DeWitt Wallace-Reader's Digest Fund also enabled the Institute to restructure its staff to include an Assistant Director (Annette Streets), a Liaison to the Sites (Patricia Lydon), and an Advisor and Writer (Thomas R. Whitaker). The Grant also enabled the Institute to design and install a new

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computer system and database that will streamline its operations and facilitate communication with the sites in the National Demonstration Project.

The award to four applicants, instead of the three originally envisioned in the proposal to the DeWitt Wallace-Reader's Digest Fund, was made possible in part by a supplementary grant of \$150,000 by the McCune Charitable Foundation.

As will be described later in some detail, the four sites represent quite different urban challenges. All have school systems considerably larger than that of New Haven, and all must deal with serious problems associated with low-income communities and a high proportion of racial and ethnic diversity. But they also illustrate different institutional configurations and different strategies in approaching those problems.

The Planning Phase

During 1997, as the Annual Report for that year has recounted, the Teachers Institute had explored, with the support of the DeWitt Wallace-Reader's Digest Fund, the feasibility and desirability of establishing such partnerships at a number of sites. It had compiled a preliminary list of schools and colleges from which it had received requests for assistance. It had surveyed 33 sites to determine their interest in adapting the Institute approach. It had sent out to those sites both videos and printed materials to explain the nature and process of the Institute.

To assist in this effort it created a Planning Team composed of James R. Vivian, Director of the Institute; Carla Asher, Program Officer, DeWitt Wallace-Reader's Digest Fund; faculty members from Yale University who have led Institute seminars; teachers and an administrator from the New Haven Public School system who have been Institute Fellows; and teachers, faculty members, and administrators drawn from the Albuquerque, New Mexico school system, the University of California at Irvine, and the University of Michigan. [See Appendix for a complete listing of the Planning Team.] The Planning Team held preliminary meetings to reach agreement on the fundamental commitments necessary to any adaptation of the Institute approach to university-school collaboration. It agreed to participate in informational site visits to applicants as might be needed. And it determined the categories of sites that might advantageously be included in a National Demonstration Project. The Planning Team wished to explore the feasibility of adaptations at sites falling within one or more of the following categories: a consortium of institutions; a city and a university larger than New Haven and Yale; a small college; a state university; a smaller university focused in the sciences; and an institution that might show how a Teachers Institute emphasizing the arts and sciences may exist in harmony with a school or department emphasizing Education.

The Planning Team made visits to five sites to communicate the nature of this Project and to begin to assess the desirability and feasibility of participation by those sites.

On the basis of responses to the survey, and previous and further contacts, members of the Planning Team then made visits during the summer of 1997 to

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five sites in order to communicate the nature of this National Project, to clarify and amplify the Institute's understanding of the issues involved in adapting the Institute's model, and to begin to assess the desirability and feasibility of participation by those sites. These sites were: the University of Houston and the Houston Independent School District; the University of California at Irvine and the Santa Ana Unified School District; the University of New Mexico and the Albuquerque Public Schools; Washington University and the St. Louis School District and several contiguous school districts; and Johns Hopkins University and the Baltimore School District.



Jennifer McNulty

Site visit meeting with teachers from Starlight Elementary School, Rolling Hills Middle School, Aptos High School, Cabrillo College, and Representatives of the University of California, Santa Cruz.

Those visits and other correspondence with additional sites led the Planning Team to conclude that the time was right for the establishment of several demonstration projects committed to the principles of collaboration that the Institute had developed over the previous two decades. The Institute therefore proposed in October, 1997, to the DeWitt Wallace-Reader's Digest Fund a four-year project that would constitute a major step toward the nationwide establishment of such Teachers Institutes. The proposal envisaged an invitation to fourteen sites, suggesting that they submit their own proposals for five-and-a-half month Planning Grants for 1998. In addition to the five sites already visited, this list included nine other variously configured sites: the Commonwealth Federation (a consortium from which we would invite application from no more than two institutions with a focus on Pennsylvania cities); Harvard University; Indiana University, Pennsylvania; Rutgers University, Newark; University of California at Santa Cruz (Monterey Bay area); University of Michigan (perhaps Willow Run, Ypsilanti, and Detroit); Virginia Polytechnic Institute and State University (rural Appalachia); and Washington, DC (looking toward the participation of one or more institutions including Catholic University, George Washington University, Georgetown University, Howard University, and the Smithsonian Institution).

Those visits led the Planning Team to conclude that the time was right for the establishment of several demonstration projects committed to the principles of collaboration.

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The proposal also envisaged that, on the basis of the Proposals for Planning Grants, the National Panel would recommend to the Director of the Institute five or six sites that seemed most deserving of subsequent three-year support for this purpose. During the balance of 1998 the Institute would then work closely with those sites. There would be a July Intensive Session that would include “national seminars” and other meetings to make evident in detail and “from the inside” the workings of the Institute’s policies and procedures. The three sites that would then be awarded Implementation Grants (by the same procedure as before) would work closely with the Institute during the period from 1998 through 2001 as they prepared and launched their own collaboratives, and their own annual seminars, adjusting the Institute approach to their own resources and the needs of their specific locations. There would be, for example, continuing directors’ meetings, a national steering committee of teachers, a complementary advisory committee of university faculty, another July Intensive Session in 1999, and three conferences in October of 1999, 2000, and 2001 to share the ongoing challenges and results.

Such a national project would establish a potentially expandable network of Teachers Institutes that should have a significant impact upon education reform throughout this nation.

Because the ground would be prepared for a self-sustaining organization at each of the demonstration sites, one could expect that they would continue the program activities after the completion of the grant period. Such a national demonstration project would not only benefit the teachers and students in those communities; it would also establish a potentially expandable network of Teachers Institutes that should have a significant impact upon education reform throughout this nation.

The entire process would be documented by persons working closely with the Teachers Institute, by persons at the demonstration sites, and by an external evaluation to be commissioned by the DeWitt Wallace-Reader’s Digest Fund.

The Planning Team helped to prepare a Request for Proposals that would specify the criteria essential to the Institute approach, which must be met by any proposed adaptation. Institute staff also developed the financial requirements and expectations that would be part of the Request for Proposals. The Institute then prepared to appoint an Implementation Team, drawn from the larger Planning Team [for complete listing see Appendix], which would make further site visits. It also prepared to appoint a National Panel, which would recommend to the Director of the Yale-New Haven Teachers Institute those sites to which, in close consultation with the Program Officer of the DeWitt Wallace-Reader’s Digest Fund, he should award Planning Grants and Implementation Grants for the National Demonstration Project.

On March 16, 1998, the Institute received informal announcement of the Implementation Grant by the DeWitt Wallace-Reader’s Digest Fund. After formal notification from the Fund on March 24, the Institute sent Requests for Proposals for Planning Grants to the fourteen invited sites. By April 7, the deadline for indicating participation in a Voluntary Information Session, it had received such indication from nine institutions. They included: Chatham College, Franklin and Marshall College, Indiana University of Pennsylvania, Rutgers

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University-Newark, The Catholic University of America, the University of California, Irvine, the University of California, Santa Cruz, the University of Michigan, and the University of New Mexico. On April 17, eight of those sites (not including the University of California, Santa Cruz) came to the Voluntary Information Session in New Haven. This session offered an overview of the National Demonstration Project; a discussion of the basic commitments it would require of any applicant for a Planning Grant; a preview of activities (the July Intensive, site visits, individual assistance, annual conferences, national committees, and documentation); and assistance in preparing Proposals (the narrative, budget and budget narrative, cost sharing, and applicable forms).



Harold Shapiro

Eight sites came to the Voluntary Information Session in New Haven.

National Demonstration Project Information Session. (Clockwise from bottom center: Rogers M. Smith and Cynthia Russet, New Haven; David E. Rotigel, Indiana University of Pennsylvania; Juan Lara, University of California, Irvine; Peter N. Herndon, Patricia Lydon, James R. Vivian, and Sabatino Sofia, New Haven; Roberta Shorr and Paul Elwood, Rutgers University; Jane Russo, University of California, Irvine; Anne Steele, Chatham College; Kathy Edgren, University of Michigan; Thomas R. Whitaker, New Haven; Donna Marler, Franklin and Marshall College; and Joan Thompson, The Catholic University of America.)

By April 24, the deadline for declarations of intent to apply for a Planning Grant, the Institute had received eight such declarations, with outlines of the likely proposals and questions to be answered. The eight sites were: the University of Houston and the Houston Independent School District; the University of New Mexico and the Albuquerque Public School District; the University of California at Irvine and the Santa Ana Unified School District; the University of California at Santa Cruz and the Pajaro Valley Unified School District; Chatham College and Carnegie Mellon University and the Pittsburgh Public Schools; Indiana University of Pennsylvania and the Pittsburgh Public Schools; Georgetown University with three public schools and a private school; and Rutgers University at Newark and the Newark Public Schools. Of those who chose not to apply, some, like Washington University, said that they would pursue this direction independently and might later affiliate with the Institute.

By May 15, the deadline for applications for Planning Grants, applications had been received from all of those sites except Georgetown University, and on May 18 those applications were circulated to the members of the National Panel,

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which convened in New Haven on June 4. On June 5, on recommendation by the National Panel and in consultation with the Program Officer of the DeWitt Wallace-Reader's Digest Fund, Director Vivian awarded Planning Grants to the University of Houston and the Houston Independent School District; the University of New Mexico and the Albuquerque Public School District; the University of California at Irvine and the Santa Ana Unified School District; the University of California at Santa Cruz and the Pajarito Valley Unified School District; and Chatham College and Carnegie Mellon University and the Pittsburgh Public Schools.

An "Intensive Session" included a three-part program to meet the needs of school teachers, university faculty, and planning directors.



Meeting with New Haven teachers on Teacher Leadership. (From left: Peter N. Herndon, New Haven; Jennifer Sandoval, Albuquerque; Jean E. Sutherland, Mary Stewart, Alan K. Frishman, and Carolyn N. Kinder, New Haven; Victoria Essien, Houston; Patricia Lydon and Pedro Mendia, New Haven; Diane Hickock and Greg McBride, Santa Cruz; and Douglas Earick, Albuquerque.)

From July 6 through July 15, an "Intensive Session" was held for the five sites that were awarded Planning Grants. This session included, as specified in the proposal to the DeWitt Wallace-Reader's Digest Fund, a three-part program to meet the needs of school teachers, university faculty, and planning directors. School teachers participated in one of three "National Seminars," which were condensed and truncated versions of seminars being offered this year to the New Haven teachers. A rigorous schedule was designed to afford ample opportunity for university faculty members and planning directors to observe both the national and New Haven seminars, while at the same time attending other meetings designed to assist them with their own roles in the Teachers Institute they were planning. Overall, the schedule was a mixture of participation in, and observation and discussion of, the processes and procedures that characterize the Institute's approach to professional and curriculum development. There were also opportunities for teachers, faculty members, and directors to caucus within their respective groups to discuss the specific roles they will play with New Haven colleagues who have experience in those roles. Time was reserved so that the team from each site could meet to consider the relevance of its experience and discussions in New Haven to the plans for their Teachers Institute.

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Rogers Smith, Professor of Political Science, led a seminar on “American Political Thought”; Sabatino Sofia, Professor of Astronomy, led one on “Selected Topics in Contemporary Astronomy and Space Science”; and Thomas Whitaker, Professor Emeritus of English, led one on “Reading Across the Cultures.” The participants, one teacher from each site in each seminar, followed a condensed version of the common reading covered in the local seminar and prepared curriculum units in stages from Prospectus through First Draft. Teachers from the sites were “admitted” to these seminars by Coordinators from New Haven who then served as advisors for them prior to the seminars. Each site also designated one of its three teachers as a Coordinator in the seminar in which that teacher participated (two seminars therefore actually had two Coordinators): they met with Director Vivian and New Haven Coordinators on appropriate issues as the seminars proceeded. Because the Institute was trying to incorporate as many experiences as possible that characterize the New Haven program, talks were also offered by the three seminar leaders to all those in attendance at the July Intensive.

The responses to the national seminars by the Fellows from the five sites were in general enthusiastic. One wrote:

Everyone in our seminar made the effort to complete the readings because we enjoyed the seminar so much and wanted to participate fully. Our seminar leader did a good job of balancing the dissemination of information and sharing of his knowledge and insights with discussion. He seemed to value responses, creating a non-threatening and inclusive atmosphere for discussion.



Michael Marsland

The national seminar on “Reading Across the Cultures.” (Clockwise from bottom left: Margaret McMackin, Pittsburgh; Myron Greenfield, Houston; Elena Bubenchik, Santa Cruz; Jennifer Sandoval, Albuquerque; Bonnie Wyner, Irvine; and seminar leader Thomas R. Whitaker, New Haven.)

Another wrote: “Our seminar leader is a model teacher. He is brilliant, kind, sensitive, and above all, human. I felt at ease in his seminar and during

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appointments. Having worked with him has raised my opinion of the Yale-New Haven Teachers Institute.”

A third Fellow wrote: “Challenged by the task at hand we plunged head-long into content, curricula, collaboration and conversation. Individually and collectively, we sought to elevate and enhance the quality and relevance of the education that we have committed ourselves to make available for the students that we serve in diversely populated urban schools.”

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Institute.*

This Fellow said of the seminar leader:

He is a “gem.” The ease with which he led us, intellectually and textually, with deep insight, expertise, and intuition while simultaneously co-sharing in the experience as a “learner” was a model for excellent teaching and professionalism. He does not reside in the “ivory tower”; rather, he lives, “tuned in” to his students, respecting, validating, and challenging the individual “gifts” that each contributed to the seminar. He generously provided personal materials, resources, support, constructive criticism and a gentle, thoughtful, scholarly presence.

Another Fellow said: “I thoroughly enjoyed the seminar leader’s charm, sense of humor, and, above all, his ability to guide me through the writing of the curriculum unit.” And yet another wrote about the curriculum unit:

The production of the curriculum unit was an extremely worthwhile aspect of the program for its teaching value, and for the focus in the thought process that was involved in creating it. Because the emphasis was on the writing of the strategies and rationale of the unit, I necessarily had to analyze why I



Michael Marsland

The national seminar on “American Political Thought.” (Around table from left: Joseph Adrian, Santa Ana; Ninfa Sepólveda, Houston; John Kadesh, Pittsburgh; Diane Hickock, Santa Cruz; seminar leader Rogers M. Smith, New Haven; and Joyce Briscoe, Albuquerque. Observers in back row: Thelma Foote, Irvine; Patricia Lydon, New Haven; Julia Lupton, Irvine.)

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would teach the subject in a certain way and what I hoped my students would achieve. This process has produced a clear, deliberate teaching unit that will definitely benefit my students. An additional benefit is the enthusiasm and energy that this creative process has generated. It has renewed my desire to find better ways to approach other lessons as well.

At a plenary meeting late in the Intensive Session an issue arose concerning the expectation that the National Fellows complete a first draft of the curriculum unit. Some felt, especially given the tight schedule and some difficulties concerning library access and computer facilities, that this should not be expected. The issue was handled and resolved in a manner that characterizes procedures within the Yale-New Haven Teachers Institute. After full discussion, it was referred to a meeting of the Coordinators. The Coordinators, after some further debate, decided to keep the expectation of a first draft as established but to make clear in each seminar that the Fellows might proceed as far toward fulfilling that expectation as seemed reasonable to them, given the logistical difficulties. In fact, all Fellows did proceed to complete first drafts. This experience authentically demonstrated the principle of teacher leadership better than any way that the Institute could have contrived.



Michael Marsland

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Plenary Session at the Intensive Session.

University faculty members observed the national seminars and also the local seminars in session; and school teachers also had the opportunity to observe local seminars. Sessions were held for university faculty members, and they also attended meetings with Yale faculty members. Each visiting faculty member prepared (in consultation with a Yale faculty member) a proposal for a seminar in a Teachers Institute. One faculty member wrote: "It was particularly inspiring to observe the faculty-teacher interaction in the local seminars. I would even go so far as to say that without those observations, I would be somewhat skeptical of the benefits of the program." This faculty member also said:

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It was exceedingly useful to see five different models (two in the local, three in the national seminars) of ways to conduct the seminar, leader expectations, participant involvement, etc. I was strongly impressed by the knowledge and commitment of the seminar leaders and their patience and ability to connect with the Fellows at a number of levels and to connect the material of the seminars to the individual situations of the Fellows.



Harold Shapatto

"It was particularly inspiring to observe the faculty-teacher interaction in the local seminars. Without those observations, I would be somewhat skeptical."
—Faculty Member

The Intensive Session meeting of faculty members on "Shaping and Conducting Seminars." (Clockwise from left: Kathleen Kish, Santa Cruz; Julia Lupton, Irvine; Colston Chandler and Wanda Martin, Albuquerque; Rogers M. Smith, New Haven; John Hardy, Houston; Traugott Lawler and Thomas R. Whitaker, New Haven.)

In general, faculty members did feel that there was some artificiality in the requirement that they develop a seminar proposal, and some of them encountered difficulty in obtaining access to resources. Even the most enthusiastic thought that their presence was not needed for the entire ten days. In accord with these suggestions, the Institute is rethinking the roles of faculty members in the July Intensive for 1999.

Sessions were also held for the planning directors, who met with Director Vivian, Patricia Lydon, and Yale faculty members. The planning directors prepared (in consultation with Director Vivian) planning statements that outlined the process needed to establish a Teachers Institute at their sites. Each member of the visiting team therefore had appropriate meetings, opportunities to observe, and tasks of writing. Additional sessions allowed the groups to meet together by site, by category of position, and as a whole (sometimes with, sometimes without, the presence of people from New Haven).

One planning director wrote:

The July Intensive greatly added to my understanding of Institute procedures. Talking with the New Haven teachers and

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attending the seminar coordinators meetings that Jim Vivian held, helped to clarify the important roles of school representatives and seminar coordinators. The simulation of a discussion of approving seminar proposals was informative.

Another said: “The observation of local seminars was not only useful administratively speaking but great fun intellectually. I believe that the experience will help our team anticipate the likely preparation that Fellows will bring to our Teachers Institute, as well as providing us with a model of the roles that each of the parties plays in the success of the seminar.” This director added: “I found the preparation of the planning statement to be particularly valuable, since it forced me to develop a timeline of tasks that needed to be undertaken.”

A third planning director said:

Participation in the Intensive revealed how critical the role of the director is in the planning and operation of the Institute. Throughout the Intensive, Yale faculty and New Haven teachers attributed the success and the longevity of the Institute in great measure to the skills and abilities of the director and the high regard in which he is held by all participants in the Institute.

This director added:

I found the breadth of the schedule to be excellent. It included sufficient samples of the activities that occur within the Institute so that at the conclusion I felt as though I had experienced all roles related to the Institute except, perhaps, those of the fund-raiser and funder. The scheduled site meetings were of great worth. They provided a formal setting in which we were able to share observations and impressions, ask questions of each other, and begin to plan for the work to be done upon our return.

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—Planning Director

Despite some problems during the July Intensive with library accessibility, computer resources, and residential conditions—problems that were addressed at the time and are being more fully addressed as the Institute plans for a second July Intensive in 1999—the experience was very useful for the participants. In summary, one Fellow wrote:

The Yale-New Haven Teachers Institute “opened its doors” literally and figuratively to building relationships and producing knowledge at a professional level for teachers spanning the “distances” of locale, experience, content/discipline, level, culture, age, race, sex, certification, interest, and talent. The collaborative spirit and disposition of this diverse group provided multitudinous opportunities to learn

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from one another in an environment that was imbued with mutual respect, trust, professionalism, cooperation, collaboration, sensitivity, and most importantly the pursuit of excellence. These characteristics are, decidedly, what contributes to the success of the Institute and will most impact replicated models.

The collaborative spirit of this diverse group provided multitudinous opportunities to learn from one another in an environment that was imbued with mutual respect, trust, professionalism. . . .



Michael Marsland

The Intensive Session Plenary Session. (From left: Diane Hickock and Greg McBride, Santa Cruz; Julia Lupton, Irvine; and Colston Chandler, Albuquerque.)

During the July Intensive Session a draft news release was given to the participants announcing the Yale-New Haven Teachers Institute National Demonstration Project. That news was then released to the press on July 28, along with appreciative and laudatory comments by United States Representative Rosa L. DeLauro, Theodore R. Sizer (Chairman, Coalition of Essential Schools), and several other educators and policy-makers. (For the full texts of these statements, see the Appendix.)

United States Senator Christopher Dodd said:

“The Yale-New Haven Teachers Institute’s effort is the beginning of a potential revolution in American education.”

*—Christopher Dodd,
U.S.S.*

The Yale-New Haven Teachers Institute’s innovative effort to promote and foster the educational partnership between Yale University and the New Haven Public School system is the beginning of a potential revolution in American education—a revolution spurred by a desire to better educate American children We all talk a great deal about improving our public schools, but in New Haven it is more than talk.

United States Senator Lieberman said: “This is just the kind of innovative partnership we must develop and replicate if we hope to rescue these urban schools and provide the children who attend them with the education they deserve.”

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Donald M. Stewart, President of the College Board, said:

On behalf of the College Board, a nearly 100-year-old association of schools and colleges, I salute the Yale-New Haven Teachers Institute for launching its National Demonstration Project. . . . The Institute stands as one of the great university-school collaborations in education, a pioneering model integrating curricular development with intellectual renewal for teachers. We applaud the Institute's tremendous contribution to the professional lives of teachers, and we sincerely hope that this project will expand its model of service to teachers across the country.

Gerald N. Tirozzi, Assistant Secretary for Elementary and Secondary Education, United States Department of Education, said:

The Yale-New Haven Teachers Institute has been a beacon of hope for what is possible when a significant partner and an enlightened school district commit to working closely and cooperatively together to enhance teaching and to improve the teaching-learning process. States and school districts across the country should pause and look carefully at the universities and schools that have discovered the power of partnership as a means for implementing meaningful reform—the results speak for themselves.

David L. Warren, President, National Association of Independent Colleges and Universities, said, "The beneficiaries of these grants will be not only the three new sites, but all those in the nation who are committed to the improvement of our public school system. This is a great day for education in America."

The planning directors from the five sites in attendance made clear the usefulness of the July Intensive Session in helping them to understand the procedures and the spirit of the Institute. One said that all six members of the team "left New Haven excited about the possibility of participating in the Demonstration Project." This planning director added: "It was not until I was able to see the enthusiasm of the Yale faculty members and the New Haven teachers for the program that I was able to fully appreciate how real the collegiality between the two groups is and how the teachers have been empowered by their experiences in 'driving' the program."

Another planning director wrote:

The July Intensive Session experience greatly influenced many of the decisions that we have made. The most valuable experiences were participating in the seminar experience and observing the National Seminars. The teachers have used their

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—Planning Director

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seminar experience to give valuable input to the rest of us. They have shared their varying images of the role of the seminar leader, the pedagogy of the seminar conduction, and the writing of the curriculum unit These experiences affected our decision making process throughout the planning phase, and were valuable when describing the intended institute and its activities.

Another planning director wrote:

The role of Seminar Coordinator was particularly interesting—how these teachers serve as organizers and as those responsible for contacting Fellows who are consistently tardy, absent, or not keeping up with their reading and writing, thus freeing the seminar leader from those responsibilities that tend to detract from the role of colleague and which might thus set him or her apart from the Fellows in an unfavorable way. . . . It is the best model, without a doubt, for encouraging interaction of university faculty with public school teachers. The YNHTI's support provides the considerable guidance for replication of the project that is absolutely required to make this expansion work. We would not be willing to “go it alone” without the experience of the Intensive session.

“It is the best model, without a doubt, for encouraging interaction of university faculty with public school teachers.”

—Planning Director



Harold Shapiro

The Intensive Session Coordinators meeting observed by Planning Directors. (Front row: Coordinators Diane Hickock, Santa Cruz; Carolyn N. Kinder, New Haven; Second row: Planning Directors Laura Cameron, Albuquerque; William Monroe, Houston; Beau Willis, Santa Cruz.)

After the July Intensive Session, a Request for Proposals for Implementation Grants was sent to the sites that had received Planning Grants. Further site visits were made by the Director and members of the Implementation Team to

Pittsburgh and Santa Cruz, and by the Director to Albuquerque, and a visit was made to New Haven by the planning director and the Director-Designate from Houston.

After the receipt of Planning Grant Reports and Proposals for Implementation Grants, the National Panel convened in New Haven on December 11 to make its recommendations.

Approaching the Implementation Phase

The National Panel concluded that four sites had distinct advantages as demonstration sites, though some concerns about budget and organizational structure remained to be resolved. The Panel, including the Program Officer of the DeWitt Wallace-Reader's Digest Fund, urged the Director of the Institute to continue working with these sites. It was evident that an array of four sites would give the National Demonstration Project a greater diversity of institutional type, urban scope, and organizational strategy. It would establish a larger base for collaboration among the demonstration sites. In case of some insurmountable difficulty at any one site, it would provide a firmer guarantee of three demonstration sites reaching a successful conclusion. And if all four sites were successful, it would provide an excellent coast-to-coast nucleus for further expansion of a league of Teachers Institutes. The Program Director of the DeWitt Wallace-Reader's Digest Fund concurred with this view. After further negotiation, Implementation Grants were therefore awarded to Teachers Institutes at Pittsburgh, Houston, Albuquerque, and Irvine-Santa Ana.

An array of four sites would give the National Demonstration Project a greater diversity of institutional type, urban scope, and organizational strategy.

At each Teachers Institute, planning is under way for mounting local seminars. In Pittsburgh there will be four seminars, two led by faculty members from Chatham College and two by faculty members from Carnegie Mellon University. Their topics are "Newspapers: Yesterday, Today, and Tomorrow"; "American Culture in the 1950s"; "Physics, Energy, and Environmental Issues"; and "Multicultural Literature: French African and Creole Writers." In Houston there will be six seminars: "Symmetry, Patterns, and Designs" (Mathematics and Computer Science); "Hollywood Distortions of History"; "The United States in the 1960s"; "Technology and the Discipline of Chemistry"; "The History, Economic Base, and Politics of Houston"; and "Addressing Evil." In Albuquerque there will be four seminars: "Archeoastronomy"; "Environmental Impacts of Human Settlement and Urbanization on the Albuquerque Region"; "Architecture in the Southwest"; and "Political Culture in New Mexico." In the UCI-Santa Ana Institute there will be six seminars: "World Mythology"; "Film and History"; "Law and Morality"; "Multicultural Literature"; "Mathematical Concepts"; and "Psychology and Social Behavior."

An Orientation Session was planned for January 8-9, 1999, in New Haven in which teams from each site, including the director, university faculty, and school teachers, will participate. The purpose of the session will be to hear

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directly the plans made by the sites for the Institutes they are creating and to begin to provide as much practical assistance as possible in the ongoing development of those plans.

National Accomplishments

Each in certain ways may serve as a model for the establishment of Teachers Institutes elsewhere in the United States.

What has been and what can be demonstrated to the educational community by those sites that have been or may be awarded Implementation Grants? Each site has its own distinctive pattern of needs and resources; each is at a somewhat different stage of development; and each in certain ways may serve as a model for the establishment of Teachers Institutes elsewhere in the United States. They will illustrate different patterns of relationship to state mandates, local resources, and institutional apparatus—and the state-funded universities will be especially interesting in this regard. Each site also has gone through a distinctive process in arranging for a director.

Houston, the fourth largest city in the nation, has a school district of great economic and demographic diversity. The University of Houston, a state-supported research institution and a metropolitan university, draws most of its students from the Houston area. It has had experience with a program, “Common Ground,” devoted to expanding the canon of literary texts in high school English courses, that was based in part upon work in the Yale-New Haven Teachers Institute. Houston will now work more fully with 18 self-selected middle and high schools (enrolling 31,300 students) to establish a teacher-driven program that will address the needs of this ethnically and racially mixed student-body, a large proportion of whom are non-English speaking. It will mount six seminars in the first year of a partnership that is already planned for six years, twice the length of the Grant. It is possible that the Houston Teachers Institute will be able to draw upon faculty from other Houston institutions of higher education in later



Harold Shapiro

Members of the Houston team at the Intensive Session. (From left: Ninfa Sepólveda, Victoria Essien, Myron Greenfield, John Hardy, and William Monroe.)

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years. At this site an experienced planning director, William Monroe, who has directed the “Common Ground” project, will serve as unpaid advisor to the Director, Paul Cooke, who has been a Visiting Assistant Professor.

Pittsburgh has a school district about twice the size of New Haven’s, with 41,000 students in 93 schools. The demonstration involves a partnership of two institutions of higher education, Chatham College and Carnegie Mellon University, which have long had collaborative arrangements in the area of teacher preparation. Chatham brings to the collaboration previous experience in teacher certification and the strengths of a small liberal arts college; Carnegie Mellon brings the strengths of a university with a strong program in the sciences. The partnership plans to work with 20 elementary, middle, and high schools, representing the three regions of the district, which have volunteered to take part. The Pittsburgh Teachers Institute will mount four seminars, two led by Chatham faculty and two led by Carnegie-Mellon faculty.

At this site Helen Faison, an experienced school administrator, now chair of the Education Department at Chatham College, will serve as Director, with the assistance of Barbara Lazarus, Vice-Provost at Carnegie Mellon, who has been designated institutional representative, and Anne Steele, Vice-President at Chatham, who will help in the relations between those two institutions. There

The demonstration involves a partnership of two institutions of higher education which have long had collaborative arrangements.



Harold Shapiro

*Members of the Pittsburgh team at the Intensive Session.
(First row: Helen Faison, Karen Schnakenberg, and John Groch; Second row: John Kadesh.)*

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is the long-term possibility here of expanding the partnership at some future date to include yet other institutions of higher education in Pittsburgh.

This is a site at which the University has given special priority to the obtaining of state funding.

Albuquerque has a school district more than twice as large as Pittsburgh's, or four times as large as New Haven's—85,800 students in 121 schools—enrolling a high percentage of Hispanic students from low-income families. The University of New Mexico is the flagship state institution of higher education with a history of attention to teachers' professional development and outreach to the minority community. This partnership seeks to focus upon the problem of high attrition rate in the schools, and has selected 22 middle and high schools where that problem is most serious. The partnership seeks to establish the relevance and interest of a teacher-driven program in a financially under-supported system by focusing its four seminars on topics that link the Southwest and contemporary issues. This is a site at which the University has given special priority to the obtaining of state funding. The President has selected the Teachers Institute as the project for the College of Arts and Sciences, and has selected on-campus technological professional development as the project for the College of Education. If funding is granted by the State Legislature, it is fairly certain to be continued in future years. This support could help demonstrate the potential at Teachers Institutes for state support. Because this Institute will add an independent qualitative assessment of students, not funded by the Grant, it will provide an additional kind of information concerning the success of curriculum units.

At this site it was decided to have a co-directorate. Wanda Martin, who has administered the Freshman English courses at the University of New Mexico, will have a half-time position here for the duration of the Grant. Laura Cameron, who has administered the Freshman Mathematics courses at the University of New Mexico, and who was planning director during that phase of the project, will also have a half-time position here for at least seven months, and longer if necessary. The partnership hopes to find a teacher from the school district who



Michael Marsland

Members of the Albuquerque team at the Intensive Session. (From left to right: Douglas Earick, Wanda Martin, Laura Cameron, and Jennifer Sandoval.)

can obtain half-time leave and join Wanda Martin as Co-Director. If this should prove possible, it would be a very interesting experiment in the administrative linking of the university and the public school system through the Teachers Institute.

The situation at the University of California at Irvine-Santa Ana Teachers Institute is yet more complex. Santa Ana is a city somewhat larger than Pittsburgh, with 53,800 students in nearly 50 schools, but it has become an ethnic enclave surrounded by more affluent communities. It is a city in which more than 90 percent of the students are Hispanic. Of the students 69 percent, and over 90 percent in elementary school, have only a limited knowledge of English. The University of California at Irvine, in an adjacent city, has a primarily white faculty and a student body more than half of which is Asian American or Pacific Island. The partnership has decided to focus on 26 elementary, middle, and high schools, representing all four areas of the Santa Ana system. It seeks to address the curriculum needs of the system as it provides curriculum and teaching styles that will support learning among students with limited knowledge of English. In doing so, the new Teachers Institute may encounter special difficulties. California has recently prohibited bilingual education and the use of affirmative action policies in admissions to the state system of higher education. There is an opportunity to show that Institute curriculum units work well in this bilingual environment. Because this Institute also intends to add a student-assessment component to its adaptation, correlated with state standards and supported by funds outside the Grant, it will also show how the Institute approach confronts the pressures of system-driven curriculum and assessment.

The Director of the UCI-Santa Ana Teachers Institute is Barbara Kuhn Al-Bayati, who has been the Liaison Officer in the Center for Educational Partnerships at the University.

There is an opportunity to show that Institute curriculum units work well in this bilingual environment.



Harold Shapiro

Members of the Irvine-Santa Ana team at the Intensive Session. (First row: Julia Lupton, Barbara Kuhn Al-Bayati, and Sharon Saxton. Second row: Joseph Adrian.)

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In different ways, at Chatham College, the University of Houston, and the University of New Mexico, the new Institutes will also show how seminars in the arts and sciences can be provided where there are already programs in Education or teacher certification.

Learning in New Haven

Throughout this year of planning, the staff and the Implementation Team of the Yale-New Haven Teachers Institute have become increasingly convinced that there is no substitute for direct observation and participation in the process of getting acquainted with the principles and practices of the Teachers Institute. We also are learning as individuals from our participation in this project. New Haven teachers are gaining experience on the national scene, exercising leadership and establishing relations with their colleagues elsewhere. They are also rediscovering, when they hear the teachers at other sites, how unusual and valuable the Yale-New Haven Teachers Institute is for them as an opportunity. University faculty members are gaining a heightened sense of being part of a national community of concerned educators. We are watching carefully the organizational arrangements and the funding initiatives at each site for any clues they may provide that will be of benefit to our own operation. Certain of the seminars offered at the four sites may alert us to topics that have been inadequately explored by the Yale-New Haven Teachers Institute. We look forward especially to work in science and mathematics in this respect, where our own offerings have sometimes not been as full or as adventurous as we might hope.

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On Common Ground

With support in part from the Carnegie Corporation of New York, the Institute had prepared one number of its periodical, *On Common Ground*, during 1997, which was published as Number 8 (Winter 1998). As noted in the Annual Report for 1997, the theme for this Number was "Building Partnerships for Our Children." The distinguished contributors included among others Gerald N. Tirozzi, Assistant Secretary for Elementary and Secondary Education in the U. S. Department of Education; John Brademas, Chairman of the President's Committee on the Arts and Humanities; Gene I. Maeroff, who directs the Hechinger Institute on Education and the Media at Teachers College, Columbia University; J. Myron Atkin, Professor of Education at Stanford University; Russell Edgerton, formerly president of the American Association for Higher Education; and David L. Warren, President of the National Association of Independent Colleges and Universities. These contributors helped to assess what school-university partnerships have accomplished in the last fifteen years and what challenges now face such partnerships.

The Editorial for Number 8, "Taking Stock and Looking Ahead," surveyed the four years of publication of this periodical, noting the high points in each Number, and making clear the scope and sequence that had been planned and supervised by the Editorial Board. The Editorial also set forth a summary of the



Institute's year of planning for a National Demonstration Project that might be supported by the DeWitt Wallace-Reader's Digest Fund. It noted that the Project would be documented by persons working closely with the Institute and by persons at the demonstration sites. And it concluded that *On Common Ground* itself will have great potential as a means of disseminating their experience and their results to a wider readership of those interested in university-school partnership.

Letters to the Institute and "guestbook" entries on the Institute's web site, which contains the text of *On Common Ground*, have testified to the usefulness of

On Common Ground will have great potential as a means of disseminating their experience.

this periodical. A teacher in Hong Kong requested a subscription. A college teacher in the Philippines wanted a back issue in order to encourage his librarian to subscribe. And a college teacher of Education in Arizona wrote: "For three years I have used the Fall 1995 issue of *On Common Ground* as one of the reading texts for a course in teaching through the arts for elementary education interns. . . . I hope the Institute sees fit to follow in the near future with other issues and writings that enlighten us all with more understanding of how the arts can empower the teacher/student/curriculum relationship."

During 1998, because funding had not been received for this purpose, no further Number of *On Common Ground* was published. The Institute continues to seek special funding to enable the continuation of *On Common Ground* as a means of disseminating the progress of the National Demonstration Project. In the meantime, it is reorganizing the Editorial Board so that it will include adequate representation from the new Teachers Institutes in the Demonstration Project. It is also working on Number 9, intended for Fall or Winter 1999, which will be the Number already designated by the Editorial Board as focusing on "Urban Partnerships." It will feature the National Demonstration Project and will include essays by participants in the new Teachers Institutes.

Looking Toward the Future

It is clear that this first year of planning has been remarkably successful in establishing a league of Teachers Institutes that stretches from coast to coast. It is important that each site begin to think of itself as a full member of this league, receiving advice and assistance from the Yale-New Haven Teachers Institute, and being monitored as necessary by this Institute, but nonetheless developing a significant collegiality with all the other sites. The Yale-New Haven Teachers

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This first year of planning has been remarkably successful in establishing a league of Teachers Institutes that stretches from coast to coast.

Institute wants to foster in other Teachers Institutes both a commitment to its principles and a necessary independence. One task for the Yale-New Haven Teachers Institute is obviously that of encouraging each site to learn how to proceed independently in its distinctive circumstances, and cooperate with other sites, while yet remaining true to the approach that we have laid down. On the basis of this preliminary success, we can look forward with appropriate caution and prudence to the possibility, if adequate funding can be obtained, of a second phase of demonstrations. Certainly the visibility of this National Demonstration Project would be greatly enhanced by some expansion of the league now established even before the end of this three-year grant.

National Advisory Groups

National Steering Committee

The National Steering Committee, formed on the model of the Steering Committee that helps to guide the Yale-New Haven Teachers Institute, is composed of one school teacher from each site participating in the National Demonstration Project. The members of the National Steering Committee are selected by the Director of the Yale-New Haven Teachers Institute for a one-year term from January through December. They will be teachers prepared to help guide the project, to help plan the conferences, and to suggest topics most in need of discussion. They will provide and receive other advice and information, and help ensure that teachers play a leading role in the demonstrations and in the common work. They will also provide feed-back on the usefulness of each meeting and will further the communication among the sites. A Steering Committee member must be—and must intend to continue as—a teacher in one of the public schools participating in the National Demonstration Project. In separate and joint meetings with the National University Advisory Council, they will provide a forum in which shared opportunities and problems can be discussed to the mutual benefit of all.

By agreeing to serve as a National Steering Committee member, a teacher accepts the following responsibilities. Each member:

1. Exerts leadership and participates actively in one or more of the major endeavors at a demonstration site.
2. Participates as an Institute Fellow in the seminar offerings at that site in the year following selection as a National Steering Committee Member.
3. Attends and comes prepared to meetings of the National Steering Committee in New Haven. During 1999 these meetings will occur during the January Orientation (January 8-9), the July Intensive (July 6-15), and the October Annual Conference (October 22-23).

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4. Participates actively in the functions of the National Steering Committee.

Members of the Steering Committee for 1998 include Margaret McMackin of the Pittsburgh Institute, Ninfa Sepólveda of the Houston Institute, Douglas Earick of the Albuquerque Institute, and Bonnie Wyner of the UCI-Santa Ana Institute, each of whom had participated in the July Intensive Session in 1998.

National University Advisory Council

The National University Advisory Council, formed on the model of the University Advisory Council that helps to guide the Yale-New Haven Teachers Institute, is composed of one university faculty member from each site participating in the National Demonstration Project. The members of the National University Advisory Council are selected by the Director of the Yale-New Haven Teachers Institute for a one-year term from January through December. They will be faculty members prepared to help guide the general direction of the project, to help plan the conferences, and to suggest topics most in need of discussion. They will provide and receive other advice and information, and help ensure that university faculty members play a leading role in the demonstrations and in the common work. They will also provide feedback on the usefulness of each meeting and will further the communication among the sites. In separate and joint meetings with the National Steering Committee of teachers, they will provide a forum in which shared opportunities and problems can be discussed to the mutual benefit of all.

The Council will help ensure that university faculty members play a leading role in the demonstrations and in the common work.

By agreeing to serve on the National University Advisory Council, a faculty member accepts the following responsibilities. Each member:

1. Exerts leadership and serves as an advisor at a demonstration site.
2. Attends and comes prepared to meetings of the National University Advisory Council in New Haven. During 1999 these meetings will occur during the January Orientation (January 8-9), the July Intensive (July 6-15), and the October Annual Conference (October 22-23).
3. Participates actively in the functions of the National University Advisory Council.

Members of the National University Advisory Council for 1998 include John Groch of the Pittsburgh Institute, William Monroe of the Houston Institute, Colston Chandler of the Albuquerque Institute, and Thelma Foote of the UCI-Santa Ana Institute, each of whom also had participated in the July Intensive Session in 1998.

National Program Documentation and Evaluation

Internal Documentation and Evaluation

Each partnership will assume responsibility for a continuing self-evaluation.

Extensive and complex processes of evaluation, with elaborate questionnaires for Fellows and seminar leaders, have always been part of the procedures of the Yale-New Haven Teachers Institute. Such evaluation has been extremely important in persuading funders, the University, and others of the value of this effort. It has also been important as a continual self-monitoring that helps the Teachers Institute to chart its course into the future. For these reasons our Request for Proposals for the National Demonstration Project requires that each of the new Teachers Institutes engage in very similar kinds of internal evaluation. Each is committed to undertaking at its own cost, in cooperation with the Yale-New Haven Teachers Institute, an annual review of the progress of the project. Each partnership will assume responsibility for a continuing self-evaluation.

Such internal documentation and evaluation at each site will become part of a more comprehensive evaluation undertaken by the Yale-New Haven Teachers Institute and embodied in its annual and final reports to the DeWitt Wallace-Reader's Digest Fund. The four new Teachers Institutes will therefore provide Institute staff, the Yale-New Haven Teachers Institute Implementation Team, and other documenters sent by that Institute with full access to their activities and their documentation, including school and university personnel and sites. Significant failure to reach stated goals of the demonstration, or to maintain the demonstration in accordance with the conditions agreed upon, could result in the termination of the funding.

Each Teachers Institute will submit interim financial reports, annual narrative and financial reports, and a final narrative and financial report. The contracts with the several sites spell out in detail the necessary contents of these reports.

The financial reports will contain interim and annual financial accountings of expenditures made under the terms of this Agreement, including verification of cost-sharing. They will set forth in detail the cost of operating the Institute, will provide a documentation of other funds allocated to the Institute, and will indicate the availability of long-term funding sources. The final report will provide such accounting for the full term of the Grant.

The annual narrative reports, which will not exceed 20 double-spaced pages, will include as attachments two copies of all brochures, schedules, seminar proposals, curriculum units, questionnaires, reports, and news articles.

The first report, and later reports if relevant, will explain how the new Institute is addressing certain concerns that were noted on the occasion of the awarding of the Grant. The first report will also describe the scope, the strategy, and the demonstration goals of the new Teachers Institute. It will explain the pro-

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cess by which it has been established and maintained, the ways that it has adapted the New Haven approach, its current activities, and the progress made toward the specific goals of the site's demonstration. Subsequent reports will include continuing description of the Institute's activities and progress.

Each report will also include:

1. Evidence that the new Institute is faithful to the key parts of the New Haven approach (the Basic Commitments outlined in the Request for Proposals for Implementation Grants);
2. A summary description of the curriculum units developed by participating teachers, with information about the teachers' classroom use of the units and any other outcomes of their participation;
3. A description of the relationship between participating school teachers and university faculty;
4. An account of the ways in which teacher-participants in the seminars have exerted leadership in planning the seminars, recruiting teachers, admitting Fellows to the seminars, monitoring their process, and assessing their results;
5. Indication of the incentives for university faculty members and school teachers to participate;
6. An analysis of the participation of school teachers in Institute activities (using surveys and other instruments developed by the Yale-New Haven Teachers Institute and modified as needed in conjunction with the several partnerships) that documents the number of teachers who apply, the representativeness of the teachers vis-à-vis the entire pool of teachers eligible to participate, and the teachers' and faculty members' assessments of the new Institute;
7. An account of the assistance from the Yale-New Haven Teachers Institute that was needed, obtained, and used;
8. An analysis of the factors contributing to, and hindering, the success of the new Institute;
9. An analysis of the effects of the new Institute upon teacher empowerment, curricular change, and other issues central to school reform;
10. Documentation of the partnership's collaborative work with the Yale-New Haven Teachers Institute (including responses to

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questionnaires dealing with the July Intensive Session in 1999 and the October conferences in 1999, 2000, and 2001);

11. An account of the progress made toward the goal of funding the new Institute beyond the period of this Grant.

At least once during the grant period, an annual report will include a survey of the use of curriculum units by Fellows and non-Fellows in the school system. Each report will also include a summary that sets forth in brief compass the accomplishments and impact of the demonstration, the impediments encountered, the unanticipated outcomes, and the lessons learned thus far.

The annual reports may also, at the discretion of the partnership, include information that it has obtained based on assessment of curriculum units or system-wide surveys of their teachers. Though the sites may also undertake, and report on, evaluation of students who are being taught by Fellows in the adaptations, such evaluations will not be supported by the Grant for this project or any cost-sharing that is contributed to its budget.

The information gleaned from this documentation will be used for annual conferences and for directors' meetings, designed to provide continuing conversation among the sites, to enable comparison and revision of the demonstrations in progress. It will also be used to inform the Institute's dissemination of the results of the project. It should have great usefulness for each of the demonstration sites in their local management, planning, and fund-raising.

The final narrative report from the several sites will summarize the three-year demonstration in terms of the items covered by the annual narrative reports and will then answer the following questions:

1. What do you think are the most important outcomes, impacts, and lessons learned from this project?
2. How has it changed the way in which your institution or other institutions may address these issues?
3. What plans do you have for continuing the partnership at your site?
4. Are there any other observations or reflections that you would now like to make about your partnership's work under this grant?

The information contained in these annual and final reports will be transmitted with the Yale-New Haven Teachers Institute's annual and final reports to the DeWitt Wallace-Reader's Digest Fund. Those reports by the Yale-New Haven Teachers Institute will provide its own supplementary interpretation and

assessment of the National Demonstration Project in accord with the criteria that have been specified in the awarding of the Implementation Grants.

External Evaluation

The Yale-New Haven Teachers Institute and the Institutes established at the partnership sites will also cooperate fully with an assessment of the National Demonstration Project that will be commissioned by the DeWitt Wallace-Reader's Digest Fund. The four new Teachers Institutes will therefore also provide evaluators commissioned by the Fund with full access to their activities and their documentation, including school and university personnel and sites.

Edward Pauly, Director of Evaluation for the DeWitt Wallace-Reader's Digest Fund, and Ian Beckford, Evaluation Officer, have explained that this external evaluation will not be used for grant-monitoring purposes. All such efforts will be conducted by the Yale-New Haven Teachers Institute. The Fund-commissioned study will make every effort to complement, and not to duplicate, the information-gathering activities of the Yale-New Haven Teachers Institute: in fact, it will use and incorporate the information that this Institute collects.

The principal goal for the Fund-commissioned study will be to provide universities and public school systems throughout the nation with answers to the questions about organizational strategies, costs, and benefits that they are likely to have about the National Demonstration Project. There is the hope that such universities and public school systems will use this information to create Teachers Institutes in their own communities, using their own resources.

The National Demonstration Project is a high priority for the DeWitt Wallace-Reader's Digest Fund. The Fund hopes to publicize the project's accomplishments and to encourage others to emulate it.

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