

Professional Responsibility and Active Trust
Evaluative Commentary Concerning the
Blueprint for Reform in Education:
Bermuda Public School System Strategic Plan 2010-2015
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Introduction

Across the world today policy makers are facing some of the most daunting challenges in the history of education. The speed of globalization, the challenges of protecting the world's ecosystems, and the continual stream of unprecedented technological breakthroughs are upending cultural patterns that stretch back generations and shifting power relations in unanticipated ways around the world. The size of nations in terms of their land mass, natural resources, and population size increasingly matters less today than their ability to nurture, attract, and retain individuals with a broad and diverse repertoire of talents. With the proper education, a rising generation can power new economies, address social injustices, and promote environmental sustainability for the decades to come.

These new developments call for close examination of the very best research and thinking on educational change. When policy makers and educators do not learn from previous policy failures or replicate unproven strategies that have produced few benefits, trust in vital institutions such as public schools is undermined. It is imperative that policy makers learn from previous mistakes made in other settings and develop new strategies for all students that are carefully calibrated to address the unique needs in their own local contexts. With such mindful adjustment to local situations, educators can play vital roles in enabling all students to thrive academically and to reach their maximum potential as free and responsible citizens.

Four Ways of Change

Three broad international policy trends can be seen in the last half century that must be understood by all policy makers today (Hargreaves & Shirley, 2009). A *First Way* of leadership and change commenced in the 1960s, when governments around the world responded to new social movements by investing enormous resources in education and trusted educators to make the best decisions for their children; this resulted in exciting innovations but also dramatic inconsistencies. A *Second Way* of change followed, when government leaders such as Margaret Thatcher in the United Kingdom and Ronald Reagan in the United States introduced standardization, accountability, and markets as levers of change in educational systems. While educators now had a wealth of data to inform their teaching, educators suffered from demoralization as their creativity and freedom were curtailed to focus on tests and standards rather than their increasingly diverse students and their new educational and social needs.

When the *Second Way* led to a disheartened and defensive public sector, new leaders in the 1990s such as Tony Blair in the United Kingdom and Bill Clinton in the US espoused what they described as a *Third Way* of change (Giddens, 1998). In the *Third Way*, new funding re-energized "civic professionals" (Sullivan, 2005) and new opportunities for teachers were provided for professional collaboration and peer-to-peer learning. Schools typically experienced a lift in achievement gains as more optimistic

and collegial *Third Way* strategies overcame the punitive climate and bureaucratic rigidity of *Second Way* policies.

Hidden costs of the *Third Way* soon emerged, however. These involved increasing reliance on a narrow range of tests and a corresponding decline in the kinds of elective course offerings that often make school appealing for disaffected youth (Nathan, 2009). Parents and community organizations found that principals had less time for them as test results preoccupied administrators' attention at the cost of older traditions of public engagement (Shirley & Evans, 2008). When achievement gains hit a plateau a few years into the implementation of *Third Way* strategies, policy makers did not readjust their approach, but simply persisted in demanding more tests, higher standards, and more accountability. Issues of how one might enhance capacity in the local school by redistributing leadership, enabling educators to learn from each other, and increasing student voice went unattended.

These real problems that accompanied the implementation of *Third Way* strategies have led us to argue that a new *Fourth Way* of leadership and change is imperative. In the *Fourth Way*, the pressing needs of educators for opportunities to learn from one another, share best practices, and try them out in their own classrooms are placed at the center of a new paradigm for school improvement. Governments steer from the top but do not micromanage change. Teachers study evidence of student learning, learn from top educators in their own country and abroad, and have professional development opportunities to shape their own curricula in communities of shared inquiry and purpose. Policy reforms related to data, standards, accountability, and markets continue to have a place in school improvement, but the school's focus is directed to the core tasks of teaching and learning. In the *Fourth Way*, educators, students, and the public find new ways to learn from one another, so that all learners acquire new opportunities to build on their strengths and to flourish.

The contrasts between the different ways of educational change are clear in a number of key areas.

1. *Goals* – The *Third Way* advocates World Class or “first class” standards as a way to restore confidence in public education, but it is not clear what these standards mean other than having a position as high or higher than other comparable nations on examination and test scores. The *Fourth Way*, by contrast, first asks what a society or educational system wants to be in terms of an inspiring and inclusive mission that drives improvement. This might be, for example, becoming more innovative, more cohesive or more ecologically sustainable as a society.
2. *Professionalism* – The *Second Way* tries to change teachers by exerting pressure and by extrinsic market incentives of performance-related pay.

Unions are seen as obstacles to be dismantled. In the *Third Way*, teachers are given additional support and opportunities for professional interaction – but specifically directed towards delivering improved achievement results. Unions are seen as potential “distracters” to be neutralized with bargains and deals. The *Fourth Way*, by contrast, supports and connects teachers, but does this more deeply to improve their understandings and capabilities in teaching and learning. Unions in the *Fourth Way* become active partners in creating better solutions that benefit all students.

3. *Accountability* – The *Second* and *Third Ways* promote extensive external accountability through publication of competitive and comparative test and examination results to shame schools at the bottom of public league tables into improving their standards. The *Fourth Way* puts responsibility before accountability, using test data in ways that are confidential to the profession so the data can identify gaps and weaknesses, highlight areas to improve, and connect educators experiencing different levels of success.
4. *Parent Engagement* - In the *Third Way*, services are delivered to parents as if they were consumers. The *Fourth Way*, by contrast, actively engages parents and communities in their local schools and in the development of the educational system as a whole, including its vision and direction.
5. *Leadership* – In the *Second Way*, principals are line managers in cultures of compliance. In the *Third Way*, principals start to become leaders of instruction and of their teachers’ capacity to deliver effective instruction. In the *Fourth Way*, leaders also work collaboratively with other leaders to inquire into and improve practice together through federations and other arrangements.
6. *Trust* – In the *First Way*, parents had passive or blind trust in their children’s teachers to be left alone to get on with the job. The *Second Way* fomented active mistrust of the profession through media and political criticism of teachers and their practice. The *Third Way* tried to restore general confidence in public education by delivering persuasive results of continuing improvement as measured by test and exam scores. The *Fourth Way*, by contrast, is founded upon active trust, developed over time by parents, teachers and the public, as they work together and learn from each other, serving the children they know best.

Summary of Key Points

The identification of *Four Ways* of change is not intended to imply that all governments should adapt all *Fourth Way* features immediately. It is designed, however, to inform policy makers about why it is that many governments have transitioned from one paradigm of educational policymaking to another. It also is intended to alert those nations that have moved beyond *First* or *Second Way* strategies about negative unintended consequences that can arise with the implementation of the *Third Way*.

Given this reading of recent international educational improvement efforts, what are some of the most salient features of the recently released Blueprint for Reform of Education in Bermuda? We begin by applauding the government's solicitation and serious study of the Hopkins report (2007) with its frank criticism of many aspects of Bermudian education. The consultation history of the period following the report gives every appearance of being open, transparent, and inclusive. Among the major achievements of this period of stakeholder review and consensus building are the following:

1. The establishment of a *vision* for Bermuda education that emphasizes the provision of "a first class education of global standards";
2. A *mission* consisting of seven strategic priorities that cover curriculum reform; the improvement of teaching and learning; distributed leadership; the improvement of standards; maximizing parent and community contributions; efficiency of delivery; and improvements in the climate of the Department of Education and the schools;
3. The articulation of four *target outcomes* that entail the attainment of proficient academic achievement that enables students to compete locally and globally; aspirations for moral, social and ethical behaviour for students; healthy fitness and wellness lifestyles; and readiness for college, post-secondary training, and skilled workforce participation.

In the remainder of this Evaluative Commentary we discuss each of these three sections in turn and conclude with a series of recommendations for the future of Bermudian education.

1.0 Vision. The proposed vision in the Blueprint is "to deliver a first class education of global standards ensuring students reach their full potential." As currently stated, this vision could be attached to any school or school system in the world; there is no specific reference to any unique features of Bermudian identity or culture. Yet as former World Bank Vice President Joseph Stiglitz has argued in *Making Globalization Work* (2007), human capital development in the new millennium can

only succeed if it capitalizes on the talent and resources that already exist in local cultures and communities. This observation leads to four questions:

- What assets and achievements already exist within the Bermudian national culture that may be underutilized by Bermuda's schools?
- How can these assets and achievements be capitalized upon in an inclusive and inspiring manner that will galvanize the entire population of the island for the extraordinary effort called for in the cover letter to the Blueprint by Chairman of the Board Darren Johnston?
- Beyond the consultation described on page 16 of the Blueprint, what strategies have been developed to enable Bermudians from all walks of life to participate in establishing the vision for Bermudian education?
- Could the vision for education include themes related to social cohesion, economic prosperity, and environmental sustainability that could link disparate social groups together within a shared consensus of an inspiring and inclusive future?

1.0 Mission. The explanation of the mission on pages 3-4 and ensuing sections places considerable confidence in the potential of standards, databases, accountability systems, and financial incentives for teachers to raise pupil achievement. Pupil test results will be published and disseminated to the public to ensure that local communities are aware of how well students are faring academically, similar to the league tables in the United Kingdom or the testing provisions in the United States.

These proposed changes combine elements of *Second* and *Third Way* strategies. They are, in many respects, a standard and standardised brand of reform strategy developed in Anglo-American contexts, that is being exported and disseminated around the world with insufficient sensitivity to local cultures or contexts (Barber 2009; Fullan, 2009; Levin, 2009). None of these reforms deal with issues of teaching and learning directly, but concentrate only on achievement results and levels of tested performance in ways that reshape and often narrow what schools do significantly. In particular, new accountability systems typically lead to more centralized authority and less flexibility and opportunity for classroom innovation (Hargreaves, 2003; MacDonald & Shirley, 2009).

International studies and especially a widely-cited OECD report on Finland (Hargreaves, Halász, & Pont, 2008) indicate that the world's highest-achieving nation on international tests has avoided *Second* and *Third Way* strategies of tightened line management and instructional prescription because they unintentionally turn principals into compliance officers and teachers into deliverers rather than co-creators

of curricula. The world's second highest-achieving jurisdiction, the Canadian province of Alberta, abolished its Accountability and Reporting Division on March 1 of this year because of its expense and questionable contribution to student learning. England has abolished three out of four of its standardized tests (with the last one hanging by a thread) and Wales has eliminated all of them.

Introducing performance incentives for teachers is not justified by research (McCaffrey, Sass, & Lockwood, 2008; Springer, 2009). Michael Fullan (2010) systematically reviews the evidence on this area of attempted improvement in his book *All Systems Go*. Fullan refers to Pfeffer and Sutton's (2006) study of a hundred years of performance-related pay initiatives. Their "evidence shows that merit pay plans seldom last longer than five years and that merit pay consistently fails to improve student performance" (pp. 22-23). Fullan himself concludes that "no research exists that demonstrates that widespread benefits derive from merit pay" and that "it is time to give up the ghost of merit pay" (p. 84).

One lesson is clear from the international evidence: High-performing educational systems do not pit classroom teachers or schools against one another in competition for rewards. Instead, they rely on capacity enhancement by professionalizing teachers learning from teachers and schools learning from schools (Hadfield & Chapman, 2009). In England the recent innovation of "federations" and especially of "performance federations" that link high-performing with struggling schools has demonstrated the great ability to improve student achievement (Chapman et al, 2009). Such performance federations create cultures in which teachers have opportunities to visit one another in their classes and schools and where they receive the support to ensure that they can learn from successful practices and adapt them with their own students. For this reason, we recommend more attention be given to the benefits of "collaborative edge" among schools rather than "competitive advantage" between them in the entire Blueprint (Hargreaves et al, 2010).

2.1 Implement an Internationally Recognized Curriculum that is Externally Assessed.

The Hopkins report (2007) criticized Bermuda's curriculum, observing that it "lacks coherence due to various inconsistencies in content and presentation" (p. 20). In this context, the selection of the highly-regarded Cambridge Curriculum is praiseworthy because of its cosmopolitan strengths that nonetheless provide abundant opportunities for educators' skilful adaptation to local contexts. The promotion of active learning, Integrated Communications Technology (ICT), and personalization through the creation of Individual Learning Plans for all students in the Blueprint is aligned with current knowledge of best practices. Caution in the implementation of ICT with the curriculum is warranted; however, as research indicates that inadequate professional development

can lead teachers and students to misuse technology for purposes of social networking and entertainment rather than academic achievement.

2.2. Improve the Quality of Teaching and Learning in the Classroom. The Department may wish to place the second of the seven strategic priorities - “improve the quality of teaching and learning” in the classroom first in the final version of the Blueprint. It is imperative that priority always is placed upon learning of the students, which is much more difficult to achieve and to measure than the relatively straightforward matter of implementing a curriculum.

We encourage Bermudians to think above and beyond the articulation of higher standards and the implementation of ICT in the classroom to ask what the ingredients are that are likely to promote greater student engagement and life-long learning. High-achieving Singapore has recently developed a policy entitled “Teach Less, Learn More,” recognizing that the relentless push on standards led to high test score results but a population ill-prepared to innovate in global markets. Teachers now have ten percent of their time designated “white space” where they do not deliver others’ curricula but rather develop their own curricula to build upon the interests and meet the needs of the students they interact with upon a daily basis. Alberta devotes 2% of its budget to supporting school-designed innovations in over 90% of its schools. For many teachers, this creative dimension of their craft has led to a re-professionalization and the kinds of “mindful teaching” (MacDonald & Shirley, 2009) that allow them to develop fully as critical thinkers and public intellectuals.

Such approaches to teachers’ capacity enhancement appear underdeveloped in the Blueprint, but they could be developed. One setting for doing so would be in the context of the proposed teacher leadership institutes. We encourage the proposed Performance Appraisal Programme be built not *for* teachers but *with* them. Here, it is of utmost importance that the professionals who interact with children and youth have abundant opportunities to influence and staff the teacher leadership institute. We encourage the assessment of teachers to be conducted not only by principals or external evaluators but also by teachers of each other. Such ongoing and embedded peer review allows teachers to develop their craft knowledge in ways that are directly linked to their everyday repertoire of instructional practices and can cultivate teacher leadership that will last for decades (Goldstein, 2010).

2.3. Strengthen and Distribute Leadership. If the Hopkins report (2007) was accurate, the Department and the schools have been characterized by a culture of autocracy and unilateralism that has led to suspicion and mistrust of external reform initiatives among the educators whose everyday work places them in direct contact with children and youth. To address this problem, the Blueprint wisely calls for the development of a succession plan that builds capacity and sustains quality leadership. However, it is

critical that the authors of the Blueprint understand a period of uncertainty and confusion can easily accompany the transition to distributed leadership (Harris, 2008; Spillane, 2006). A transitional phase between autocratic and distributed leadership may be inspirational leadership that still leads from the front but in a way that builds motivation and commitment among the wider community (Hargreaves & Harris, 2010).

The Department of Education may not have the internal resources to overcome its autocratic legacy on its own. To address this problem of distrust between the Department and educators working in schools—which is a global challenge, and hardly unique to Bermuda—Bermudians may wish to consider strategies that could open up the Department and schools and help them to be more responsive to their key constituencies. These could include rotations that allow classroom teachers to be seconded for work in the Department and likewise place civil servants from the Department back into direct contact with children and youth. In a setting as small and geographically isolated as Bermuda, such rotations might also involve the sizeable private sector in order to distribute and develop capacity across public and private domains.

Distributed leadership does not mean additional delegation of tasks onto already overworked teachers in a kind of “contrived collegiality” (Hargreaves, 1994) but enabling teachers to take on new roles with some degree of agency and support and share their own ideas for improving their schools. Promoting this cultural shift will require considerable time and patience as teachers learn to develop new responsibilities and difficulties should be anticipated with time allocated to work through them patiently and confidently in the first planning and implementation phase.

2.4. Facilitate the Improvement of Standards via Accountability and Transparency. As stated above (page 7), we encourage the Department to be cautious about the degree to which accountability systems contribute to high student learning. US reforms affiliated with the No Child Left Behind Act of 2001 have shown that elaborate and expensive accountability systems are fully compatible with low student achievement and persistent academic achievement gaps (Fullan, 2010). More important than accountability and transparency is capacity enhancement in climates of active trust, educational inclusion, and the promotion of collective responsibility for all children in a school and community.

2.5. Maximize the Contribution of Parents and Community. The establishment of a National Parent Teacher Association is an important step, as is the creation of a Parent and Community Resource Center. The on-line “Parent Connect” portal is a valuable innovation to enable parents with computer literacy to gain insight into their children’s learning. To ensure that less advantaged families also have access to this information and can participate in their children’s schools, the Department may wish to explore some of the strategies used by community organizers who have worked to establish better school and community relationships through home visits, community-based curricula, and parent

centers in schools themselves. These innovations have been explored in a variety of international settings and are most successful when educators are able to overcome a certain degree of professional defensiveness to learn from and with parents' together (Hargreaves & Shirley, 2009; Shirley, 1997, 2002).

2.6. Improve the Efficiency of Delivery. The Hopkins report (2007, p. 17) noted that Bermudian "School principals are generally efficient in administering their schools" but that "They are less effective in assuring the quality of teaching and learning." This distinction is not reflected in this strategic priority, which is written such as to strengthen, and not diminish, the managerial culture of which the Hopkins report was critical. For this reason we recommend either dropping this strategic priority altogether or writing it more clearly to emphasize the importance of responsiveness to requests from schools by the Ministry of Education. The Hopkins report (2007) call for a "radical overhaul" (p. 30) of the Ministry. This means far more than changing the efficiency of delivery which is a Third Way brand and priority. It means a profound culture shift so that the Ministry always places the teaching and learning of children and youth rather than other concerns at the centre of its agenda.

2.7. Improve the Culture and Climate of the Department of Education and the Schools. An emphasis upon "a climate of trust, respect and positive relationships" within schools is imperative to create high-achieving schools and this dimension of the Blueprint is praiseworthy. However, trust must not be understood in such a way that implies simply better compliance of teachers and students with the Department's leadership. This is merely a vague kind of public confidence. For the "relational trust" that contributes to student learning to exist in schools, it must entail four key attributes: respect, competence, personal regard for others, and integrity (Bryk & Schneider, 2002). This trust can only arise and be sustained when there are genuine opportunities for all to collaborate together through active trust in shaping a common educational future for Bermuda.

3.0 Student Target Outcomes. The four target areas related to academic achievement, ethics, health, and postsecondary education and careers are well chosen and justifiable. Our primary concern with this section concerns the repeated use of 90% of a given student population achieving a goal. No defence is provided for why it is that 90% is the appropriate percentage of students who should meet early childhood targets, school attendance targets, community service completion, or age appropriate fitness levels. The percentage is simply provided again and again as the target goal.

This apparently unreflective repetition illustrates the problems that arise with the establishment of targets. These problems have been well-documented in a widely-cited Working Paper from the Harvard Business School entitled "Goals Gone Wild: The

Systematic Side Effects of Over-Prescribing Goal Setting” (Ordóñez et al, 2009). The authors identify “specific side effects associated with goal setting, including a narrow focus that neglects non-goal areas, a rise in unethical behavior, distorted risk preferences, corrosion of organizational culture, and reduced intrinsic motivation.” (p. 2.) The authors accept that goals are necessary but urge managers to consider “the complex interplay between goal setting and organizational contexts” (p. 16) so that areas that are not addressed explicitly in the goals—say, in the case of Bermuda, the promotion of environmental sustainability or social justice—are not damaged by a single-minded pursuit of the named goals.

Disconnecting the targets from the deliberative processes of the teachers who are to help the students achieve the targets, and the students who are aspiring to meet them through their studies, gives target-setting an unrealistic and mechanistic veneer in schools. Rather than simply receiving targets from the Department of Education, faculty and students in schools should be encouraged and expected to set their own targets together – and given the leadership and technical support to do so. Faculty need to understand that helping students to learn and thrive is their own responsibility more than an administrative mandate.

4.0 Recommendations. Bermuda has enormous assets. The island has a spectacular ecosystem that attracts tourists and financial leaders from around the globe. Although serious social inequities exist, on the whole Bermuda is wealthy, with comparatively low unemployment and little of the acute economic needs that exist in many urban areas around the world. While recent incidents of gang and drug-related violence raise serious concerns of social cohesion, on the whole the island is peaceful and harmonious. At the same time, Bermudian education suffers from major deficiencies that were glaringly revealed in the Hopkins report (2007). The Blueprint represents a serious response to address those deficiencies and reflects many long hours of work by policy makers, teachers, parents, community members, and students. The stakeholders who wrote the Blueprint are owed a debt of gratitude by the Bermudian community.

At the same time that we acknowledge the enormous effort that has gone into the Blueprint, we have advanced several critical comments throughout this evaluative commentary. If we return to the typology of *Four Ways* of change described on pages 3-4, the Blueprint appears to advance primarily *Second Way* strategies, with some affinities with *Third* but few with *Fourth Way* thinking. Testing, accountability, and standards figure prominently in the Blueprint’s theory of action. The adaptation of the Cambridge Curriculum, while promising as a point of departure, appears to take precedence over the necessary attention required to improve teaching and learning. Proposed reforms call for more efficiency in the leadership of the Department of Education and sidestep the cultural changes called for in the Hopkins report. A call for distributed leadership does

not appear to be accompanied by the enormous cultural changes required for distributed leadership to work and the challenge it presents to more autocratic styles of leadership.

If Bermuda advances with the Blueprint as its road map for change, we should anticipate that it will experience similar outcomes as other jurisdictions that have gone this path before, such as the US and England. Schools will shift instruction to focus more on tested subjects and their accompanying standards. After a brief dip in scores, due to the implementation of new content, schools will experience a quick rise in achievement results as a result. This will build public confidence and raise morale at the outset.

The problematic aspects of the *Third Way* are not evident in the beginning, but only become apparent as the strategies that led to the initial gains—usually, narrowing the curriculum, recalibrating instruction so that more time is spent on test-preparatory activities, and the provision of out-of-school mentors and tutors—are depleted. Educators must then seek out more creative and sustainable strategies that can help them beyond the limits of the *Third Way*.

These observations lead one to question whether Bermuda might explore another path that would focus much more directly on issues of teaching and learning in schools. In this *Fourth Way* the Department of Education would do the following:

- Develop an inspiring, urgent participatory process to develop and agree on a vision for the future of Bermuda and the place of public education within it.
- Secure extensive public and parental engagement in the development and renewal of this vision and in the educational process at every school.
- Provide struggling schools with professional development and leadership support to help them to learn to work with data, while also supporting them to deal with those aspects of student learning such as teamwork, creativity, and social and emotional learning that are not well captured by data.
- Give students out-of-school tutors, and also give them opportunities to provide their own ideas in shaping their school cultures and curricula.
- Provide teachers with building-level coaches who respond to teachers' genuine questions as well as raising academic achievement.
- Use performance data in professionally confidential ways to promote inquiry and prompt action to improve teaching, learning and achievement within and across schools.
- Promote *collaborative edge* rather than *competitive advantage*. Establish systems and cultures in which educators share best practices, visit one another in schools to see ideas in action, clearly acknowledge and capitalize on differences of knowledge and expertise; and professionalize the idea of *schools learning from*

schools. In particular, support and resource teachers who are succeeding with students in struggling schools to share their practices with others.

- Expect and encourage schools and teachers to develop ambitious shared targets for improvement and provide the technical support that helps them to do so.

In these ways Bermuda can build the teaching profession, improve student learning, and benefit from changes that will endure long after the five year plan outlined in the Blueprint has expired.

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