Note: This issue captures a qualitative analysis of the first 70 issues of the Lead the Change Series, as presented at the April 2017 AERA Educational Change SIG symposium.

The field of educational change has grown into a multidisciplinary community that addresses both micro- and macro-level systems, policies, and practices to improve education for all students. It is not surprising then that explorations of evolving educational changes and reforms take many forms and shapes in both formal as well as informal contexts contributing to a field that is full of twists and turns that generate an intricate landscape for research and scholarship.

One venue for engaging in conversation about educational change has been the Lead the Change Series (Educational Change SIG, 2011-present). The Series features both established and emerging educational change experts from around the globe who have engaged in groundbreaking scholarship. The Series serves to offer an opportunity to identify common challenges across contexts, to highlight promising research, to offer insight on small- and large-scale educational change, and to spark collaboration across the educational change community.

Launched in the Summer of 2011, the Lead the Change Series has published thought-provoking interviews with 74 scholars from over 25 countries. The accessibility of the series in its design, format, and content has enabled individual issues to spread ideas globally. Single issues have not only been shared with government ministries and agencies, NGOs, and national practitioner associations, but also used as readings in graduate courses and in professional development settings thus contributing to the Series’ congealing into a platform of cutting edge scholarship. These issues, we
find, are an intellectual tonic, as they represent the most current thoughts and issues scholars grapple with in regard to local and global educational change. Without reducing the rich discourse that is put forth and pushed forward in the issues of the Lead the Change Series, and given the very qualifications of the Lead the Change Series—that provide space to capture dynamic thinking of what educational change is for, why it should happen, and how—the purpose of this issue is to highlight several themes that contribute to our distilled perception of local and global educational change. The identified themes, described below, are not exhaustive, nor are they mutually exclusive. Many can be associated with notions that fuel the work of educational-change scholars.

**Methodology**

This issue offers an overview of the core cross-cutting themes across the 70 issues of the Lead the Change Series that were published up until May 2017. Some of the themes were foregrounded by the interview questions; others were identified through a careful analysis of the texts featured in the issues. It is important to note that the interview questions divide into two groups: one of common questions shared across most of the issues; the second of more personalized inquiries about the respective work done by the scholars.

This division of questions, while less prominent in the first issues, was intentional in later issues, as we wanted to create a shared platform where scholars push forth their insights in regard to common matters. Overall, the questions yielded responses that map out a vista of perspectives, shared concepts, and consensual perceptions of what, why, and how to bring to educational change that allows for success for all. For example, none of the questions specifically, or directly, elicited input on theoretical frameworks or methodological practices employed in the work of educational change. Nonetheless, reference to both emerged as a recurring theme within and between interviews. Theme labels were formulated by drawing on quotations categorized under each theme, which were later aggregated into four groups. More on the themes and their aggregation into overarching notions will be discussed in the next sections.

To facilitate the retrieval of themes and supporting statements, all the issues were uploaded on ATLAS.ti, Version 1.5.4. This also allowed for an iterative approach to analysis. Applying contextual narrative analysis (Maxwell, 1996), each issue was coded for both descriptive and thematic frames through inductive categorical data analysis (Corbin & Strauss, 2008; Creswell, 1998). The first phase of analysis was to manually identify recurring themes—that were partially evoked, in a sense, by the interview questions. Following an aggregation of sufficient number of recurrences (in the first 30 issues), we employed a semi-automatic coding with ATLAS.ti, which allowed us to examine and determine compatibility of additional supporting statements with the formulated codes.

Combing through the first 70 issues, 39 codes were identified and 530 quotations
were captured. The 39 codes were then grouped into four overarching themes (described below). The 39 codes include reference to bottom-up change; context-specific educational changes; data use; equity; methodology; ownership as a catalyst for change; relationship between research, policy, and practice; and large-scale change, to mention just a few. Following a closer examination of the 39 codes, they were grouped into four overarching themes: public accessibility to research-based insights and increased visibility of educational change; axiology and educational change; theory and methodology in the field of educational change; and the relationship between research, practice, and large-scale change.

In order to better represent the relationship between the themes, we use the analogy of a network of interconnected nodes, which allows us to underscore the complex nature of change in educational systems (Davis & Sumara, 2006). In the following sections, we describe the four thematic nodes where the 39 sub-categories of smaller nodes fall under. Given the nature of networks, we would like to point out that our identification of the four nodes does not exclude other, probably equally important, themes that could have been put in the limelight. In addition, our choice of the four thematic nodes does not necessarily reflect the magnitude of reference to the theme in the published issues. Rather, it reflects our noticing and our understanding of what stands out as a timely issue to attend to. Drawing on Taleb (2010), we dub this act of identification as noticing a “black swan,” that is, noticing a theme that is relatively sparse but that is nonetheless consequential in the work of educational change. We would like to highlight the very nature of the Lead the Change Series as an informal platform for discussion that is conducive to the emergence of budding ideas and to the identification of not-well-trodden research trajectories. The order in which we describe the nodes in the next sections does not stand for their respective importance. We simply present them alphabetically.

The nodes of axiology, ethics, and moral values

Questions, whether explicitly expressed or tacitly alluded to, in regard to the purpose of educational change, are a common thread in the Lead the Change Series. They turn our attention to the axiological dimension that drives educational change. Such questions include but are not limited to: Why we should engage in educational change? Why should we learn to do things differently? How and why do we introduce the changes and how can they—and should they—contribute to the collective experience of humanity? And what is the mission of schools? Shirley (2012, Issue 21) points out, “We might be able to make more honest contributions by helping the public and policy makers to explore the ethical ramifications of different strategies” thus highlighting the strong association between educational reforms and changes and ethical implications.

Similarly, Jansen (2011, Issue 6) draws a strong line between the notion of ethics and educational change arguing that it should
be the driving force to educational reforms, and Castro (2011, Issue 7) points to the increasing awareness of judicial authorities to defend the right to a quality education.

To draw on Moore Johnson’s recent wake-up call, the question that arises is: How can educational change be “designed to provide greater opportunity for all students” rather than “to increase options for some students” (Moore Johnson, 2017, Issue 69). Some of the themes that fall under this cluster include: data used or abused to bucket students into groups thus unwittingly contributing to instilling inequity at the system level; using poverty as barriers to attaining education; and depriving students of what they need in light of local, global social, political, and economical trends and developments.

The questions that frame this cluster are important as they turn attention not only to considerations of what the purpose of schooling and education is and of how this purpose can be achieved through concentrated efforts both locally and globally but also to issues of equity and opportunities for social mobility through schooling.


The theme of the axiological dimension of educational change is a common thread that blurs context-specific differences. If we think of the one underpinning question that underlies this axiological dimension of educational change, it is the question: What kind of world we want and how can we contribute to making this happen (Robinson, 2014, Issue 43; Tucker, 2015, Issue 52). The axiological dimension and the moral obligations that espouse it, add an important perspective in the work of educational-change scholars as they turn the limelight to questions such as: How can students be put first in educational reform discourse? How can deeper attention be effectively turned to learning, student voice, and student engagement in the learning process? (Cámara, 2011, Issue 11; Mehta, 2013, Issue 30; Nine, 2013, Issue 33; O’Neill 2017, Issue 66; Ruto, 2013, Issue 28; Sahlberg, 2011, Issue 5; Sancho-Gil, 2016, Issue 54; Zhao, 2011, Issue 4).

That notions of standardization and testing also raise axiological considerations is evident (English, 2016, Issue 61; Lenskaya, 2012, Issue 14; Ravitch, 2013, Issue 32). The negative correlation in the association between learning and standardization is paramount as the more tests there are, the less learning that is meaningful and substantial takes place. This realization turns attention to questions such as: What is schooling really for? (Zhao, 2011, Issue 4); How is learning affected by practices of standardization and testing? (Fenwick, 2016, Issue 61; Kohn, 2016, Issue

Designing education systems that are responsive to future learning needs (Gerver, 2013, Issue 31; Mehta, 2013, Issue 30); balancing system reforms to eliminate barriers to learning and to increase equity with quality (Pont, 2014, Issue 35); modernizing our education systems to ensure prosperity for all (Daly, 2013, Issue 26; Sahlberg, 2011, Issue 5; Tucker, 2015, Issue 52); focusing and continually reinforcing a small number of goals that are clearly bundled with ethical purposes (Harris, 2012, Issue 20); and opening and supporting out-of-school time programs to close gaps in opportunities for high-quality learning (Malone, 2015; Issue 49) are some directions that were identified as potential explorations of the dimension of axiology and change. If we need to summarize this point in one sentence, O’Neill’s (2017, Issue 66) conveys it best when she identifies the most important issue in educational change today as “Equity of access and opportunity.” This is both concise and precise a message as it can be.

The nodes of public accessibility to research-based insights and increased visibility of cumulative knowledge in education

The understanding that insights gleaned from research in general and from research in educational change in particular do not get adequately communicated to the public is identified as a problem that needs to be seriously attended “to inform both macro and micro contexts” (Malone, 2015, Issue 49). What stands as an impediment to effective educational change, says Lott (2016, Issue 65), is that “the perspectives of teachers, families, and the public at large stand in stark contrast to insights gleaned through research.” This is an important insight in its own right as it goes beyond our understanding that research can inform practice to also mean that educational change stands to benefit from reciprocity between research and practice (Edge, 2016, Issue 60; Lott, 2016, Issue 65; Moore Johnson, 2017, Issue 69).

In addition to creating or strengthening an open channel of communication between researchers and the public at large, clearly communicating to the public the educational purpose of the change is essential in order to foster a shared vision for change (Veugelers, 2016, Issue 63). Harris (2012, Issue 20) calls attention to potential repercussions if such engagement is not practiced continually. She explains, “without this constant drumbeat, actions can be misinterpreted, responses can be misunderstood, and positions can become entrenched.” Recognizing the need to increase public accessibility to theoretically or empirically substantiated insights is one thing—knowing how to make it happen is another thing altogether. Drawing on Finnigan’s (2016, Issue 58) self-positioning as a public intellectual and identifying it as a helpful strategy to increasing public accessibility to insights garnered through research, we ask, what can be additional strategies and mechanisms for communicating educational change research
to inform public debate and ultimately to expedite educational change?

But this node of public accessibility to research insights is not—and should not—be unidirectional or restricted to a particular group such as families. Instead, such cooperation typifies partners who are diverse in their institutionally assigned roles and whose learning is mutually constitutive (Finnigan, 2016, Issue 58). This public includes teachers who need to have access to professional literature that not only suggests promising theoretically and empirically supported practices but also provides an adequate conceptual framework and reasoning behind the suggested practices.

This point of accessibility to research-based insights is crucial to supporting professionals in any field, and particularly in the field of education. Growing teachers’ professional capital is linked to supporting teachers in learning and innovation, strengthening the profession, increasing teacher quality, and building trusting, collaborative networks within the profession (Anderson, 2014, Issue 39; Couture, 2012, Issue 22; Finnigan, 2016, Issue 58; Hargreaves, 2012, Issue 18; Harris, 2012, Issue 20; Lott, 2016, Issue 65; Moore-Johnson, 2017, Issue 69; Shirley, 2012, Issue 21; Talbert, 2014, Issue 40; Zhao, 2011, Issue 4). Lieberman (2011, Issue 2) highlights the role of researchers in communicating insights to others, “Researchers who take it upon themselves to study phenomena that advance all students must also be sure that their work is being communicated to both those who practice and those who are responsible for policy making.”

The question that arises at this point is how do we build collective trust and public engagement? Some scholars suggest doing so through fostering a shared vision and common principles (Datnow, 2012, Issue 12; Fleisch, 2012, Issue 23; Shirley, 2012, Issue 21). Until this happens, explains Lott (2016, Issue 65), we need to “ensure the practice of what we already know, make informed decisions about when and where research is truly needed, and advocate for best practices if gold-standard research is not available.”

The nodes of research, practice, ownership, and large-scale change

Although research in educational change has accumulated substantial evidence that shows what works and what does not work in education, accumulated knowledge is increasing far more rapidly than our ability to apply this knowledge. Shirley (2012, Issue 21) explains, “There are three primary reasons for the continual tension between the knowledge researchers produce and the lack of response from the profession:” lack of consensus between researchers about the meaning of their insights; transferability of context-specific factors; and outright rejection by teachers.

In a similar token, Gomez (2011, Issue 13) notes, “One might argue that the most difficult knowledge to unearth is the practical knowledge of how to get something into action.” Nevertheless, scholars are continually looking for ways and models that can generate large-scale impact (Banerji, 2015, Issue 47; Barber, 2011, Issue 10; Colbert, 2013, Issue 29; Earl, 2011, Issue 9; Harris, 2012, Issue 20; Lieberman, 2011, Issue 2).
Context-dependent factors that preclude direct adaptation of practices and structures of successful systems have been identified by other scholars such as Leithwood (2015, Issue 53) who underscores the lack of controlling for context-dependent factors when learning from educational systems that have successfully introduced large-scale change. He specifically brings the Finnish example to drive the point home. Nonetheless, acknowledging the complexity of large-scale change does enjoy the status of consensus as more than a handful of scholars identify other conditions that affect the process of achieving system-wide adoption of educational change. Kidder (2014, Issue 34), for example, identifies engagement with change as “a complicated beast” that is difficult to manage and systematize.

In spite of the context-dependent differences, one common theme that emerged across contexts was the theme of ownership over educational change—a concept paramount to large-scale change and reform (Fullan, 2012, Issue 16; Griffin, 2011, Issue 8; Rincón-Gallardo, 2016; Issue 57; Ruto, 2013, Issue 28; Seashore Louis, 2016, Issue 56; Skerrett, 2014, Issue 36). Rincón-Gallardo (2016, Issue 57) explains, “Ownership on the side of educational authorities involves openly endorsing the pedagogical change agenda, protecting schools from policy distractors, and securing access to key capacity building resources.” What do teachers get to say about the change, their taking responsibility and stewardship over the change they implement, the reasoning they attribute to their reformed practices—in short, the sense of ownership they assume or that is granted to them has a significant role to play in large-scale changes and reforms.

Against this backdrop, large-scale change has remained the measure for a successful systemic change. Scholars are cognizant of the fact that educational change involves a multi-disciplinary inquiry, and that it happens through networked collaboration (Daly, 2013, Issue 26; Levin, 2013, Issue 25; Luke, 2015; Issue 46; Malone, 2015, Issue 49; Payne, 2014, Issue 37; Rincón-Gallardo, 2016, Issue 57; Veugelers, 2016, Issue 63; Weinstein, 2015, Issue 45). How do we move beyond interventions as a unit of analysis and focus attention on understanding the impact of large-scale change? The public, school personnel, and policy makers share responsibility and stewardship to bring about changes that reflect insights garnered from principled theoretical and empirical research (Ben-Peretz, 2016, Issue 50; Hattie, 2016, Issue 55; Saphier, 2016, Issue 59; Tucker, 2015, Issue 52). Shared vision is identified as the mechanism through which such changes can be realized (Sahlberg, 2011, Issue 5; Schildkamp, 2017, Issue 68; Seashore Louis, 2016, Issue 56; Tucker, 2015, Issue 52). Sahlberg (2011, Issue 5) clearly articulates this idea, “whole-system reform can be successful only if it is inspiring to all involved and thereby energizes people to work together for intended change.”

Making sense of the interrelationship between research-policy-practice means that attention needs to be paid to knowledge animation and utilization (Campbell, 2014, Issue 41; Earl, 2011, Issue 9; Schildkamp,
These terms frame the research-policy-practice connection as multidirectional, dynamic, and fluid rather than unidirectional, static, and shriveled. Stoll (2014, Issue 38) suggests thinking of knowledge in terms of animation rather than mobilization. Such thinking is more conducive to using other helpful vocabulary to understanding educational change such as distributed practices, reflection, and shared ownership that yield meaningful changes (Jensen, 2011, Issue 6; Robertson, 2013, Issue 27; Spillane, 2012, Issue 15).

The nodes of theory and methodology

When we talk about educational change, we talk about how we perceive it, how we operationalize it, and what are its important tenets. While these can be implied, open discussion about these issues can help identify, crystallize, and solidify theoretical venues and methodological aspects.

Theoretical frameworks help us better understand how things work. They create structured landscapes to understanding educational change. An exploration of this theme in the Lead the Change Series yielded several theoretical frameworks that point to the complex nature of educational change. Moore Johnson, for example, calls for a consideration of the school as an organization to better understand phenomena that pertain to teacher retention (Moore Johnson, 2017, Issue 69). Sahlberg warns against a continued use of the business model of incentives in educational contexts (Sahlberg, 2011, Issue 5); Daly underscores the utility of network theory to understanding change (Daly, 2013, Issue 26).

A related theme is methodology. The overarching question this theme addresses is what methodologies need to be developed to better measure and capture complexities of systems change that include considerations of cultural and social dimensions in addition to technical and political elements (Leithwood, 2015, Issue 53). Mehta (2013, Issue 30) calls for an expansion of research methods explaining, “much more could be achieved than through our current paradigm of practitioners acting and researchers documenting and evaluating.” Stoll (2014, Issue 38) describes research designs such as using vignettes to capture “lived experience as it occurs.” Sancho-Gil (2016, Issue 56) tells about a research group whose work enables us to “consider naturalistic and narrative methodologies such as ethnography, biographical practices, and arts-based research as forms of inquiry and as tools to recount the experiences (ours and others’) that occur in the phenomena we approach.”

Leithwood’s (2015, Issue 53) observation that “The field of educational change is, at best, a loose coalition of disparate specialties with very different methodological orientations” corroborates Malone’s (2015; Issue 49) calling for research driven by interdisciplinary scholarship, “If we expect transformational change to take place in our schools and communities, change that moves the needle on a broader set of outcomes, we need to be
in constant communications with intra- and interdisciplinary scholarship. We need more diversity of perspectives that push the boundaries of our own thinking and research.” Payne (2014, Issue 37) notes that “the kinds of questions that we tend to ask are questions about central tendency, or what’s happening to our average. We think of the experiment as the best way to establish causality when in fact the experiment seldom tells you what the process was—the 'how' by which the results were obtained. We pay too much attention to a relatively narrow range of methodological tools.”

Considerations of theoretical and methodological issues are integral to the work of educational change.

**Future trajectories**

Exploring the 70 issues of the *Lead the Change Series* was also an opportunity to identifying future trajectories for the field of educational change. While such trajectories may point to potential directions of research, they may also spark debate around questions such as the purpose of schools and what kind of a world we want to help create.

Kohn (2016, Issue 64), for example, suggests we “ask the root questions: not whether standardized test results are being misused but why we would want to standardize assessment in the first place, not how teachers can deliver information more effectively but whether learning is best understood as the delivery of information, not how to grade more fairly but why (in light of the disadvantages, and the alternatives) we would use grades at all.”

There are different kinds of emerging pressures that need to be addressed through educational change. Some emerge as a result of contextual events such as economic needs and developments (Couture, 2012, Issue 22; Noguera, 2011, Issue 3), others are formulated by political climate, media pressure, and public opinion (Gerver, 2013, Issue 31), still others result from corporate interests that are “eyeing billions of dollars of potential profit” (Kidder, 2014, Issue 34), short-lived political mandates wanting to ensure quick results between elections (Pont, 2014, Issue 35), pressures that shut off agency and innovation (Cámara, 2011, Issue 11), or bottom-up pressure for educational change (Rincón-Gallardo, 2016, Issue 57; Payne, 2014, Issue 37).

Tucker’s (2015, Issue 52) observation is relevant here, “The human community has now reached a point at which our collective survival will require a kind and level of education we have never provided before. It is hard to imagine how humans or the planet we live on will survive unless we can develop not only the technical knowledge required, but also the social skills, empathy, knowledge of history and politics and moral fiber that will be vital.” These encompass many of the driving forces for educational change.

**Scholarly significance**

The analysis of the issues of the *Lead the Change Series* yields a bigger picture than what may be apparent at first glance. Taken together, the thematic nodes described above provide a snapshot of current thinking of scholars from the educational
change field. Following a close examination of what initially looked like a loose bulk of codes turned into a network of interconnected concepts and perceptions relating to the work of educational change. In spite of the great geographical diversity between the scholars interviewed to date, the ideas expressed share more similarities than differences, which made it possible to generalize the themes. Some questions that emerged during the coding process related to the qualifications of the prevalent codes. It was noticed, for example, that while the first 30 issues or so highlighted practical suggestions—for example, how and why teaching should become a profession (Lieberman)—the later issues highlighted challenges of mass data use, ethical challenges, large-scale change, notions of ownership, and data accessibility and visibility. These could be put front and center through informal conversations in the Lead the Change Series that allow for a fluid exchange of simultaneously emerging ideas.

Furthermore, these ideas bump against each other as they are generated by scholars from a great variety of fields such as assessment and evaluation (Earl, 2011, Issue 9); cultural studies (Valenzuela, 2014, Issue 42); ESL (O’Neill, 2017, Issue 66); language and literacy (Skerrett, Skerrett, 2014, Issue 36); mathematics education (Lott, 2016, Issue 65); policy (Fullan, 2012, Issue 16); progressive education (Kohn, 2016, Issue 64); and teacher leadership and development (Lieberman, 2011, Issue 2), to mention just a few. As well, the representation of multiple countries and geographical regions around the world creates polyphony of voices and experiences in educational change. In addition to work from the United States and Canada, the Lead the Change Series also represents scholars from Afghanistan (Yacoobi, 2014, Issue 44); Argentina (Gvirtz, 2011, Issue 12); Australia (Griffin, 2011, Issue 8); Brazil (Castro, 2011, Issue 7); Chile (Weinstein, 2015, Issue 45); Colombia (Colbert, 2013, Issue 29); England (Harris, 2012, Issue 20); Finland (Sahlberg, 2011, Issue 5); India (Banerji, 2015, Issue 47); Israel (Ben-Peretz, 2015, Issue 50); Kenya (Ruto, 2013, Issue 28); Mexico (Cámara, 2011, Issue 11); New Zealand (Timperley, 2015, Issue 51); Singapore (Ng, 2015, Issue 48); South Africa (Jansen, 2011, Issue 6); Spain (Sancho-Gil, 2016, Issue 54); and Russia (Lenskaya, 2012, Issue 14), to mention just a few diversified contexts of socio-cultural backgrounds.

The four thematic nodes identified in the 70 issues of the Lead the Change Series epitomize what Andy Hargreaves, the founder of the Educational Change SIG envisioned, “My hope when the SIG was founded was to establish a place for a community to meet of scholars who looked at the purposes and processes of change from different perspectives and disciplines, and who did this from the standpoint of helping to develop policy, or from a position of challenge and critique” (Hargreaves, 2012, Issue 18). This vision has taken shape in the Lead the Change Series that puts forth different perspectives, disciplines, and perceptions of changes that can bring us closer to what schooling and education should be for.

In light of the social and political
maelstroms that sweep the world, the question of how and why educational change takes place is relevant today as it is a dominant and determining factor in shaping societies.

**References**


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