USING ACTIVITY THEORY AND EXPANSIVE LEARNING TO CO-CONSTRUCT UNDERSTANDINGS OF COMPETENCIES IN K-12 EDUCATION IN BRITISH COLUMBIA

by

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**Using Activity Theory and Expansive Learning to Co-Construct Understandings of Competencies in K-12 Education in British Columbia**

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Abstract

This formative intervention study used activity theory and expansive learning frameworks (Engeström, 2001) to examine how a working group of 12 educational leaders from one British Columbia school district co-constructed their understandings of competencies. These leaders were supporting school and district colleagues with the redesigned curriculum, originally known as the BC Education Plan (2012a) and later as Building Student Success: BC’s New Curriculum (2018a), as well as with the Ministry of Education’s revised Student Reporting Guidelines (2016). Over nine research sessions, participants explored their contexts and future-oriented visions of learning with a focus on competencies. These sessions were audio-taped; the audio tapes were then transcribed. Transcripts were initially sorted for sensitizing concepts according to the theoretical concepts of activity theory: subject, object, mediating instruments, rules, community, and division of labour. This coded data was then analyzed for themes and sub-themes reflecting needs at each state of the expansive learning model: questioning, double-binds of practice, contextual resistance, and reflection on realignments. The analysis that emerged from this process showed how participants co-constructed understandings of competencies that went beyond demonstrations of knowledge, skills, and aptitudes; instead, they focused on competencies as a collective need to honour local collaborative learning communities, co-construct diverse learning paths, and shift systemic practices toward expansive learning. Participants described the importance of professional collaboration, engagement, relationships, and new assessment models, as well as the challenges of supporting colleagues to act on their ideals and contribute to shifting district practices. This study provides a rich perspective on how activity theory and expansive
learning can be used as models for understanding the complexities of systemic change in public education systems.
Lay Summary

This formative intervention study uses activity theory and expansive learning to describe how a group of educational leaders from one British Columbia (BC) school district co-constructed their understandings of the competencies focus of the new provincial curriculum. The study describes how these participants expanded their conception of competencies as part of a collective process; they identified the need to honour local collaborative learning communities, co-construct diverse learning paths, and shift systemic practices toward expansive learning. Session transcripts were coded by sensitizing concepts and then analyzed for themes in relation to the contradictions of the expansive learning framework: questioning, double-binds, contextual resistance, and realignments. Participants reflected on their conceptual ideals in terms of the practical, contextual, and transformational implications of focusing on competencies as part of the district’s change efforts. This study provides a rich perspective on how activity theory and expansive learning frameworks help understand the complexities of systemic change.
Preface

I designed and conducted this research study under the supervision of Dr. Alison Taylor and with input from my committee advisors, Dr. Hongxia Shan and Dr. Jennifer Vadeboncoeur. The initial proposal for this study received input from our School District Assistant Superintendents and Assessment and Learning Coordinators (see Appendix A).

I obtained approval from the UBC Research Ethics Board, Certificate # H16-02816, April 12, 2017 under the project title: Understanding Competencies as a Shift in Educational Practices in British Columbia. I renewed this certificate April 3, 2018, and again February 25, 2019 (H16-02813-A002), to extend my research timeline. I also obtained approval April 10, 2017, from the Superintendent of Nanaimo Ladysmith Public Schools (School District #68) to invite educational leaders in the school district to be part of this study. I sent the invitation letters and consent forms to participants April 18, 2017 (see Appendix C and Appendix D), and we had our first working group session May 10, 2017. Our final working group session was November 15, 2017. The educational leaders who consented to participate in the working group for this research were 12 colleagues from Nanaimo Ladysmith Public School District. Their names in this study are pseudonyms and were assigned randomly.

For the purpose of this dissertation, November 13, 2018, I requested and obtained permission (File #7200003614) from the Copyright Officer of the Intellectual Property Program at the Ministry of Citizens’ Services to use the graphic of the Know-Do-Understand Curriculum Model (see Figure 1).
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Acknowledgments

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My doctoral journey has been a personal quest to deepen my own understanding of competencies. That quest has been nourished and stimulated through the thoughtful critique and queries of my advisor, Dr. Alison Taylor and the members of my dissertation committee, Dr. Hongxia Shan and Dr. Jennifer Vadeboncoeur. My committee provided me with a solid sounding board, gently encouraging me to let go of some of my earlier vague connections to focus on how educators were co-constructing their understandings of competencies in relation to their educational practices.

I could not have completed this research without the unwavering support of my husband, Dr. Gérald Fallon. My children, my parents, and my critical friends from the 2014 Educational Doctorate cohort, the district working group, and my personal circles helped me find strength through the more challenging moments of this journey. The professors in the EdD program opened a Pandora’s Box of research areas to explore. I am especially thankful for the elective courses, first with Dr. Alison Taylor and later with Dr. Mona Gleason where I was able to focus on my research interests and spend time analyzing my data. The Educational Doctorate program has provided me with many paths for this journey into the tangled woods of daily educational practices; I hope my work may shine a small light on the shifting practices in schools. With gratitude to Yrjö Engeström for inspiring my expansive learning journey into the realm of competencies!
Dedication

This study is dedicated to educators and mentors everywhere who challenge learners and systems to go beyond what they believe possible. Thank you Bridget, Carol, Dana, Ellen, Faye, Gordon, Henry, Isaac, Janice, Lauren, Marissa and Naomi. Even though these are not your real names, you know who you are. I enjoyed these challenging conversations and look forward to many more!

Karina
Chapter 1 Engaging in Expansive Learning

After spending a half century in education, for the most part in British Columbia, as a student, a teacher, a parent, a principal, an author of educational resources and a researcher, perhaps curriculum change should feel like more of the same old, same old... but it doesn’t. If anything, my time spent supporting, educating and working with colleagues has convinced me that we do not find real changes in curriculum reform documents; we find them in the culture and spirit with which educators have created, received, and shaped these documents to improve learning environments for students. (Younk, Personal Reflection)

Purpose of this Study

In 2015, the redesigned curriculum of the province of British Columbia (BC), first known as the BC Education Plan, defined core competencies as “the intellectual, personal, and social skills that all students need to develop for success in life beyond school” and curricular competencies as “subject-specific skills, strategies, and processes students develop over time” (BC Ministry of Education, 2015d). The organic nature of the framework of the BC Education Plan (BC Ministry of Education, 2012a)—in part influenced by provincial, national, and global input—seemed to represent a greater shift than any previous reform initiative in British Columbia. Curriculum documents available on line in draft form were evolving as educators across the province provided their input, suggestions, and feedback. Where educators had expressed frustration over the prescriptive nature of the existing curriculum, many seemed eager to engage with the BC Education Plan. At the same time, educators across the province were attempting to make sense of the notion of “competencies” and what changes they would need to make to their teaching, learning, and assessment practices in order to support the diverse learning needs of their students while implementing the new curriculum.
In August 2016, our school district decided to simultaneously implement the BC Education Plan’s new curriculum, Building Student Success (2015a, 2018a), and the new reporting guidelines, the Student Reporting Policy and Interim Student Reporting Guidelines for Grades K-9 (2016). By moving forward on both initiatives, the district stimulated intense discussions among local educators. As both a participant and an observer in these conversations, I noticed district and school-based educational leaders attempting to support their colleagues while making sense of curriculum and reporting changes. I saw this study as an opportunity to work with some of the educational leaders in our district to explore the energy and tensions of co-constructing these new understandings of competencies, while leading a curriculum transition process that would potentially shift local teaching, learning, and assessment practices.

Situating My Interests in Competencies as Expansive Learning

I was curious to understand why the focus on competencies in BC’s current curriculum reform seemed to energize many educators in our district to take on leadership roles in supporting colleagues to shift their teaching practices. Prior to conducting this study, I was not able to report on the motives of colleagues; however, I could examine why, from my experience as an educator and as a researcher, I sensed there was something much bigger happening through these curriculum changes. Rather than ignore these feelings, I have included personal reflections (PR), presented as block quotations in italics, to situate how my experiences have shaped my stance as a researcher, an educator, and a learner in this study. In these epigrams, I have attempted to recognize some of the “aha” moments that contributed to my learning journey and shaped my understanding of competencies as a form of deeper learning.
From the start of my teaching career in 1982, Jason, one of my bright-eyed grade three students, sparked my thinking about boundaries between disciplines and ideals for better curriculum integration. I was reminded how, in my efforts to focus on the unique elements of each discipline, students were attempting to integrate these fragmented learnings into personally meaningful contexts.

*Having explored the problem-solving method in math and the inquiry method in social studies, I began describing the scientific method. Jason’s hand popped up. “Isn’t that what we do in math and social studies, too?” Curious, I asked him to explain. “Well, we look at problems, ask questions, figure out what we need to solve the problem, test our ideas, and decide if they work or whether we need to start again.” I smiled at his interpretation, “You are absolutely right.”* (Younk, PR)

Like Jason, students and colleagues over the years have activated and expanded my experiences in directions I would not have ventured alone. Regardless of age, role or background, collective efforts to construct understandings have expanded my learning.

This is my second experience with educational reform in British Columbia; my first began shortly after I moved to BC in 1987. At the time, I was co-authoring educational resources by building on each provincial jurisdiction’s curriculum reform efforts to improve students’ learning experiences (Fallon, Jobin, & Younk, 1992-1996; Younk, 1996). I saw these provincial reform efforts as a desire to weave connections between students’ lived experiences at school and outside of school.

My interest in the concept of competencies began in 2001, when I researched Quebec’s efforts to improve learning by building on cross-curricular competencies (Ministère de l'Éducation du Québec, 2001; Younk, 2003). I interviewed individuals who used the input from the Estates General (the public’s educational vision) to create the conceptual framework of the *Quebec Education Program* (QEP). This new curriculum
drew its inspiration from the UNESCO report titled Learning: The Treasure Within (1996a), which focused on the global and collective educational aims of a learning society founded on four pillars: learning to live together, learning to know, learning to do, and learning to be. Even though the UNESCO report was written over 20 years ago and is not without its critics, educational jurisdictions still seek to improve individual and collective learning in schools so learners may contribute to their communities in meaningful ways. I would have liked to investigate Quebec’s implementation at local school levels, but our family returned to British Columbia. At that moment, competencies were not yet on the BC Liberals’ election platform radar or reflected in BC’s vision for learners (BC Liberals, 2001; BC Ministry of Education, 2002).

Ten years later, when the BC Ministry of Education began planning a redesigned curriculum focused on competencies, I saw an opportunity to continue my inquiry into how provincial policies stimulate local level changes. Yet, when I first reviewed the proposed BC Education Plan (2012a), I was surprised by my negative reaction to the Plan’s definition of communication competency as “language, symbols and digital literacy” (BC Ministry of Education, 2013).

This technology-driven definition brought to mind a workshop I had attended in 1982 at the start of my career where Heather-Jane Robertson, author of No More Teachers, No More Books (1998) urged us to consider the implications of the mantra “It’s just a tool” commonly used to neutralize discussions about computers in classrooms. Robertson convincingly described how computers would reframe our thinking about learning and restructure our educational budgets and systems. She cautioned that instruments of power, for better or for worse, deserved more respect than to be considered as “just a tool.” I wondered if 30 years later the term “competencies” was to become the next instrument of power in education. What new debates and changes would the operationalization of this term generate? (Younk, PR)
My reaction to the *BC Education Plan*'s initial definition of the communication competency was tied to Robertson's (1998) caution that a simple statement like “it’s just a tool” could have powerful implications for how resources were used and allocated. I worried that a focus on technical aspects of communication would lead educators to focus more on the tools used to change communication and less on the relational intentions of communication. After 35 years in education, Robertson’s words continued to resonate, and I was wary of how *BC’s Education Plan* had so narrowly defined communication competency. It seemed the Ministry of Education and the Premier’s Technology Council had decided digital literacy was the answer to all problems in education. I worried that student-teacher relations and inputs from communities were being minimized.

My skepticism about how communication as a competency was depicted as “language, symbols, and digital literacy” influenced my reaction to the promotional video of the *BC Education Plan* (2012b), released to build excitement for the reform.

*Photos of students interacting with teachers dropped onto a laptop screen with the message “Teachers must be supported.” In sharp contrast to the “support” message, one red, free-standing ladder appeared amid ten white ladders all suspended mid-air leading nowhere with a banner of “earlier focused help for struggling students.” When a chameleon on a bamboo stick popped up with the script “schools must be more adaptable,” I immediately thought of Telus’ publicity with the chameleon. What message was this video really promoting?* (Younk, PR)

Telus was one of the partners in the Premier’s Technology Council, the group charged with creating the vision for *BC’s Education Plan*, which led me to ponder to what extent companies were influencing the marketization of education and the types of resources available to educators. Following a series of technology images in the video, I was disturbed by the sudden lack of technology in the frames depicting support for students. I questioned whether the image of a lone red ladder among the many white ladders was an
appropriate symbol to represent the video’s claim of “a need for earlier, focused support for struggling students.” Given the juxtaposition of red and white, was this a reference to struggling students or to students of Aboriginal ancestry? I was disturbed that this video ignored students’ relationships with their cultures, their communities, and their environments. The contradictions in this video sparked my motivation to dig deeper into understanding how the notion of competencies was being constructed in British Columbia!

My initial exploration of the BC Education Plan’s definitions of competencies collided with my excitement over what I believed competencies could mean for recognizing the diversity of students’ learning potential in K-12 education.

In August 2014, an Aboriginal teen captured my attention, drumming for the welcoming ceremony of a kayak event in Alert Bay, BC. Even though he was not an experienced paddler, he joined the group to kayak around Cormorant Island. In the evening, he proudly described the symbols in his carvings as he welcomed us into the ceremonial Big House, before politely excusing himself so he could tend to the central fire. When the ceremony began, this youth took his place at the front with the honorary chief to drum and sing the welcome song. Later, he emerged as one of the dancers, chanting and rhythmically moving to the drum, occasionally slowing his steps to encourage a younger dancer. I marveled at this young man’s skills and his confidence, knowing what needed to be done, when and how to do it, while interacting easily with others. (Younk, PR)

How would the diverse competencies of this young man from Alert Bay be valued and reflected in BC’s curriculum? With input from Indigenous communities in British Columbia, both locally and through the provincial First Nations Educational Steering Committee (FNESC), the original 2012 version of the BC Education Plan (Government of British Columbia, 2012) changed and now weaves Aboriginal understandings throughout the plan. As a result of individuals and groups providing feedback from their local contexts, the redesigned curriculum, now known as Building Student Success: BC’s
New Curriculum (BC Ministry of Education, 2015a) is evolving as educators and communities are actively shaping the curriculum.

When I began my doctoral studies at UBC in July 2014, I was interested in developing a better understanding of BC’s focus on competencies. I began by listening to how local educators were interacting with the redesigned curriculum. One incident stands out as an early example of how a single voice shifted colleagues’ thinking. In December 2015, our district asked volunteers to participate in a leaders’ training session. On January 6, 2016, approximately 60 principals and teacher leaders gathered to prepare for a district-wide curriculum implementation day on the new BC Education Plan. One of the organizers had just finished explaining how educators would be sorted into grade groups for elementary (K-7) and into subject areas for secondary (8-12) grades.

*After an audible pause, a voice from the back of the room cautiously questioned the rationale for these groupings. Encouraged by this first courageous query, others added their views, communicating that if the focus was on understanding core competencies like critical and creative thinking, personal and social responsibility, awareness and identity, and communication, then perhaps hybrid K-12 groupings would generate broader group discussions. This opposition to the usual organizational structures surprised the organizers. To their credit, the organizers examined the suggested changes and agreed to use cross-grade groupings. With this simple change, I felt a tangible shift in my motivation to participate as one of the “peer trainers.” Speaking with others afterwards, I learned they had felt inspired as well. (Younk, PR)*

By accepting this individual’s suggestion, the organizers had both modeled and validated the importance of remaining open during implementation discussions so new ideas could emerge, potentially shifting status quo practices.

The change in structure of the district’s first curriculum implementation session shifted the focus from grade levels and subject areas to create a space for professionals to share their diverse perspectives on curriculum change. Educators used BC’s Know-Do-
Understand curriculum model (see Figure 1) and the core competencies (thinking, communicating, personal and social identity) as the stimulus for these broader conversations.

![Figure 1. BC's Curriculum Model - Know-Do-Understand](image)

At this first curriculum implementation session, January 29, 2016, the collective energy of educators seemed upbeat, especially after hearing several students share their positive learning experiences. The day was not without tensions and contradictions as Grade 11 and 12 teachers raised concerns about how the redesigned curriculum would align with
graduation requirements. Others worried about resources and time to process the changes. As participants filed out from their sessions, I heard appreciative comments for how peer leaders had guided their exploration to highlight the key elements of the BC Education Plan. One teacher confided she had been reticent to attend but was glad she had come as she was leaving energized and confident. (Younk, PR)

This teacher’s comment stands out as a reminder that one individual’s suggestion at a key moment in the planning process had shifted the dynamics of this day. Of course, there was still a lot of work ahead, as educators had also voiced fears about the enormity of implementing these shifts in their practice but there was a willingness to begin.

At the district’s second curriculum implementation day four months later (May 16, 2016), Maureen Dockendorff, BC Ministry of Education’s Superintendent of Early Years, addressed educators’ concerns about the significant changes in the curriculum.

Be forgiving of yourselves. Don’t give up. Join the “slow teaching movement.” Be in the here and now, work with your students so they can continue to move on. There is nothing in the curriculum that has to be “covered” by June, but there is so much to “uncover.” Think big and act small by picking a discipline you love. Weave in the big ideas and the competencies. Be on the journey and collaborate with each other. This work is too hard to do alone. (Dockendorff, Personal Communication)

Dockendorff’s encouragement set the tone for a day where educators worked in small groups exploring ways to begin their implementation journey. I joined several rich conversations where educators were designing new units around big ideas as part of their school or district-based professional learning inquiries. In this journey, educators were also learners actively engaged in co-constructing their understanding of competencies.

Competencies come into play when students are engaged in “doing” in any area of learning. This includes activities where students use thinking, collaboration, and communication to solve problems, address issues, or make decisions. The ultimate goal is for learners to employ the core competencies every day in school and in life, and for the core competencies to be an integral part of the learning in all curriculum areas. (BC Ministry of Education, 2018b)
I noticed enthusiasm and engagement but also concerns and anxiety as these educators wrestled with co-constructing new learning projects. They were also wrestling to convey a sense of how they understood core and curricular competencies, both conceptually and practically, in relation to ensuring that all students learn through a range of experiences.

How different these experiences felt just three months later when, returning from summer vacation, principals and vice-principals learned of the Ministry of Education’s addition of the Student Reporting Policy and Interim Student Reporting Guidelines for Grades K-9 (Government of British Columbia, 2016). These K-9 guidelines required educators to provide evidence of student voice when they reported to parents on student growth in the core competencies. How could I capture the dissonance between the message to “join the slow teaching movement - think big, act small” and these new Student Reporting Guidelines? What tensions would this create for educators attempting to understand both the new curriculum and the significant changes to reporting? What framework could capture how educators were co-constructing their understandings of competencies, even as new elements were being added?

A Framework for Co-Constructing Understandings

Seeking a theoretical and conceptual framework that fit my research inquiry, I initially considered Engeström’s (1987, 2001) early work in activity theory and expansive learning, because I saw its potential for analyzing how the Ministry of Education’s tools, from the BC Education Plan to the New Curriculum: Building Student Success (2012-2018) and the Ministry’s Student Reporting Guidelines (2016) were stimulating educators to focus on competencies. However, after reading Engeström’s later studies (Engeström, 2015; Engeström, Sannino, & Virkkunen, 2014), I realized activity theory and expansive
learning were also relevant for considering the role of local educational leaders as agents driving systemic changes.

From my experiences, I wondered about the dynamic tensions between educators sharing and debating possible interventions to support students. Engeström’s framework of expansive learning examines how individuals focus on systemic contradictions in order to create new instruments in the form of models, tools, and processes to work toward the object of their systemic activity. As I was both a researcher and a participant in this study, using a Formative Intervention Research (FIR) methodology made sense on two levels. First, I could use my research and educational experience with the concept of competencies to stimulate deeper connections for participants in this study. Second, since the educational leaders participating in this study were also involved in supporting colleagues across the district, my methodology aligned with the work they were doing. I saw activity theory, expansive learning, and formative intervention research aligning well with my research aim to study educators’ efforts to expand their conceptual and practical understandings of competencies. It also offered me conceptual guidance to explore the energy, fears, efforts, and tensions these leaders were experiencing and describing as they worked together to co-construct practical systemic change processes to improve learning outcomes in our local school district.

**Research Questions**

This study considers how educational leaders (principals, vice-principals, teacher leaders, and district coordinators) were attempting to provide supports to colleagues across the district. Grounding my research in Engeström’s activity theory and expansive learning, which I describe in detail in Chapter 3, I examined how a small group of
educational leaders in varied roles were co-constructing their understandings of competencies. I wanted to know how educators were using core and curricular competencies, key elements of the *BC Education Plan*, to stimulate changes to teaching, learning, and assessment practices in our school district. Motivated by the change efforts of educators in this district, in this study I explore four research questions.

1. How are educational leaders co-constructing their understandings of competencies as learning?
2. What instruments are educational leaders accessing and creating to support colleagues in co-constructing understandings of competencies?
3. How are educational leaders working with contradictions and resistance from local learning communities in co-constructing understandings of competencies?
4. How do educational leaders perceive this focus on competencies to be shifting teaching, learning, and assessment practices in their local school district?

These research questions highlight gradual shifts in systemic structures as educators were engaged in co-constructing their understandings of competencies in relation to their teaching, learning, and assessment practices in our district.

**General Outline of this Study**

The EdD [Educational Doctorate] in Educational Leadership and Policy… program is grounded in the belief that it is important for participants to engage in scholarly discourse about understanding, critiquing and improving practice in educational settings… While the program addresses Canadian educational issues and perspectives in a global context, it is the particular settings and leadership or policy responsibilities of the participants, which is the starting point of seminars.  

(Department of Educational Studies, UBC)

In line with this quote, my aim in pursuing my Educational Doctorate, is to continue improving collective educational practices. Educators are often so immersed in change efforts they do not have the time to pause, step back, examine, and reflect on their role in these change processes. Conducting this research with colleagues, I provide a
model enabling educators to notice how their efforts to co-construct understanding are an important element in systemic change processes.

To inform my understanding of the evolution of competencies as a potential form of expansive learning in K-12 education, I first explore the research literature on competencies (Chapter 2). I then examine the research literature on the theoretical and conceptual foundations of activity theory and the expansive learning cycle (Chapter 3). Working from these foundations, I set out to describe the global, provincial, and local factors shaping educational changes in British Columbia (Chapter 4). Using activity theory as the theoretical framework to ground this study, I use a formative intervention research process based on Engeström’s expansive learning framework to work with a group of leaders in my local school district (Chapter 5).

As each research question explores a different aspect of our working group’s co-constructed understandings of competencies, I focus on different concepts of activity theory at different stages of the expansive learning cycle. I first look at how participants in this study co-constructed their conceptual understanding of competencies as learning (Chapter 6). I then focus on the instruments the participants accessed and created to support their colleagues in co-constructing their practical understandings of competencies (Chapter 7). From there, I examine how participants use contradictions and resistance from their local learning communities to expand their contextual understandings of competencies (Chapter 8). I use this information to summarize how participants were co-constructing their transformational understandings of competencies as a shift in teaching, learning, and assessment practices in their local school district (Chapter 9). My concluding thoughts and recommendations for further study are in Chapter 10.
This research process has been an opportunity for me to work with a group of educational leaders in one school district to co-construct our understandings of competencies, beginning with how core and curricular competencies were defined and presented in *BC’s Education Plan* and as captured by engagement and resistance from the field. In this study, I speak to some of the challenges our working group faced in attempting to bring about intentional changes to planning and assessment practices through a competencies focus for learning. It is important to note that the situated experiences of one group of educators cannot simply be transposed to another district, as each district has its own cultural and historical foundations to consider. However, learning from our working group’s documented experiences may serve as a roadmap to help other districts plan their co-constructed processes for locally driven change.

The participants commented that what they most valued in this research endeavor was the opportunity to come together, away from the hectic pace and expectations of their individual work environments. They appreciated the opportunity to take a step back, to reflect, to ask open questions, and to hear and react to other’s responses. By negotiating their personal understandings of how the concept of competencies was changing educational practices, these participants used their heightened understanding to support colleagues in their schools with examining *how* competencies were shaping teaching, learning, and assessment practices. Understanding competencies also has implications for how leaders are also learners creating processes and spaces to explore and expand their own ongoing learning needs. This project is an account of how a group of educational leaders in one BC school district, myself included, engaged in our expansive learning journey in 2017 with the recent provincial curriculum change focused on competencies.
Chapter 2 Competencies as a Changing View of Learning

The notion of *competencies* in the research literature portrays a range of definitions and intentions. In education, this relatively new concept is evolving as educators build on their knowledge and experiences with this term. At the time of this study, there was little research literature on competencies in K-12 education, other than in the area of vocational training (Biemans et al., 2009; Chalkiadaki, 2018). In this chapter, I examine how notions of competencies have evolved in K-12 education in jurisdictions in Canada and Europe. I explore how the research literature highlights some of the concerns and benefits of a competencies approach to learning. Finally, I use the literature to examine how a co-constructed focus on competencies may be influencing teaching, learning, and assessment practices in our local context.

**Notions of Competencies in K-12 Education**

The Latin origin of *competens* (to be fit, proper, to go or seek together) speaks to personal and collective definitions, perceptions, and intentions for competencies in educational reform. The term also alludes to potential contradictions and issues of power and control. To be fit for what purpose? To be proper by whose standards? To go or seek together with whom (and who is excluded)? Who determines the degree of competence and for what purposes? This spectrum—from the personal to the collective, from the empowered to the controlled—is an important consideration as educators attempt to co-construct understandings of competencies in the context of BC’s current educational reform. If competencies are shaping contemporary visions for educational change, I needed to consider why this concept had become a focus in many jurisdictions and associated with 21st century education.
The concept of competencies seems to highlight a simple fact: educators cannot anticipate and prepare students for every context or experience, so learners need opportunities to explore their own pathways for extending their learning, sharing their understandings, and reflecting on their expanding competencies. For example, Woodruffe (1991) distinguished between competence “defined as aspects of the job which an individual can perform” and competency “referring to a person’s behaviour underpinning competent performance” (in Delamare Le Deist & Winterton, 2005, p. 29). Mulder, Gulikers, Biemens, and Wesselink (2009) defined competency as “a situated element of competence, which can be behaviour-oriented and/or task-oriented and meaningful in a specific context and at a sufficient level of specification” (p. 758).

The plural form of competence and competency becomes competencies. Mulder et al.’s (2009) definition of competencies seems confusing and circular:

> The integrated set of capabilities (or competencies) consisting of clusters of knowledge, skills, and attitudes necessarily conditional for task performance and problem solving and for being able to function effectively (according to certain expectations or standards) and in a certain profession, organization, job, role and situation. (p. 757)

Who defined the expectations and standards, and for what purposes? Hoffman (1999) attempted to clarify this confusion by suggesting that how competency is defined is related to each researcher’s or practitioner’s rationale:

> If competency means performance, then the rationale for using the approach is to improve, or in some way change human performance. Where competency means standards or quality of performance, then the rationale is to standardise skills, raise standards, introduce change or set minimum standards of performance. Where competency means the underlying attributes of individuals, then the rationale is to determine the syllabus or content of learning that will lead to competent performance. Meaning emerges from the required application of the concept as it relates to human performance. (p. 277)
Thus, while researchers and practitioners may have an underlying rationale to focus on competencies as performance, standards, or attributes, in practice competencies are often about performance and standards and attributes. For example, at first glance, BC’s redesigned curriculum appeared to focus on competencies as performance skills, directing educators’ attention to focus on what students are doing.

The **core competencies** are the intellectual, personal, and social skills that all students need to develop for success in life beyond school. B.C. has identified three core competencies as essential for all learners: Communication, Thinking, Personal and social competency. Core competencies are directly related to students becoming educated citizens.

The **curricular competencies** are the skills, strategies, and processes that students develop over time. They reflect the "do" in the know-do-understand model of learning. While curricular competencies are more subject-specific, they are connected to the core competencies.

(emphasis in original, BC Ministry of Education, 2016a)

Yet, when the *Know-Do-Understand* model (see Figure 1 in Chapter 1) of BC’s *Education Plan* was coupled with the core competencies, the BC Ministry of Education’s definition became more complex. The curriculum model referred to “content learning standards” and “curricular competency learning standards”, in addition to an expectation that students were able to understand big ideas as generalizations and principles. As the core competencies were defined as “skills that all students need to develop for success in life beyond school,” “essential for all learners,” and “directly related to students becoming educated citizens,” the core competencies were broader in scope than an assessment of subject-area performance skills; they were personal, relational, and societal. “Success in life beyond school” suggested that educators would personalize instruction to individual learner’s attributes and that school systems needed to accommodate different ideals of success for every learner. Therefore, the notion of
competencies in BC’s K-12 curriculum was not as easy to categorize as Hoffman suggested. Instead, there were variations in emphasis depending on the learners, the educators, and the collective classroom culture, as well as the school and district focus. Community partners involved in shaping provincial curriculum and local implementation influenced these variations. As the purpose of this study was to explore how educational leaders in one district co-constructed their understanding of competencies, I needed to understand the evolution and implications of different views on competencies.

**Cultural and Historical Evolution of Competencies in Education**

Mulder et al. (2009) provided an historical overview of the evolution of the term *competence*. In Table 1, I present Mulder et al.’s historical evolution of competencies in juxtaposition with researchers’ perspectives relating to these various traditions (Delamare Le Deist & Winterton, 2005; Jeris, Johnson, Isopahkala, Winterton, & Anthony, 2005). Columns 3 and 4 describe how these various research traditions (Bowden, 2000) are potentially shaped by different intentions or rationales for improving competencies (Hoffmann, 1999). Each of these traditions continues to have a following of researchers. The notion of competencies is a dialogic concept defined by individuals and groups in relation to their conceptual intentions, practical purposes, contexts, and cultural values.

It is possible for each intention, as summarized in Table 1, to be part of the targeted aims of school districts at different levels and for different purposes. For example, departments of learning might look at district-wide training models, while district managers might look at strategic alignment between district and school goals. School-based teams might focus on defining specific learning goals for students with
challenges, and professional learning committees might aim at building collective capacity and motivation.

Table 1

**Evolution of Competencies in Research Literature**

<table>
<thead>
<tr>
<th>Competencies as a reflection of cultures (Mulder et al., 2009)</th>
<th>Research literature on competencies (Delamare Le Deist &amp; Winterton, 2005; Jeris et al., 2005)</th>
<th>Perception of meaning of competencies (Bowden, 2000)</th>
<th>Intention or rationale for improving competencies (Hoffmann, 1999)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historical Daily speech</td>
<td>Hammurabi (Persian), Plato (Greek), Latin</td>
<td>Generic - Competere; to go or seek together</td>
<td>To define knowledge, skills, attitudes or</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Varies with culture and language</td>
<td>attributes (KSA) needed for a task or a context</td>
</tr>
<tr>
<td>Behavioural sciences</td>
<td>(White, 1959)</td>
<td>Behaviourist – build on effective interaction</td>
<td>To change cognitive capacity and motivation</td>
</tr>
<tr>
<td>US Tradition</td>
<td></td>
<td>with the environment</td>
<td>for action in workplaces</td>
</tr>
<tr>
<td>Systems sciences</td>
<td>(Boyatzis, 1982; Gilbert, 1978; McLelland, 1973)</td>
<td>Additive – observed traits are added or learned</td>
<td>To train individuals for effective, standardized,</td>
</tr>
<tr>
<td>US Tradition</td>
<td></td>
<td>to meet qualities or performance standards</td>
<td>quality performance &amp; knowledge</td>
</tr>
<tr>
<td>Management</td>
<td>(Boyatzis, 2008; Jones &amp; Moore, 1993; Woodruffe, 1993)</td>
<td>Integrative - interrelationship of effective</td>
<td>To provide models for integrating performance</td>
</tr>
<tr>
<td>UK Tradition</td>
<td></td>
<td>underlying characteristics and functional</td>
<td>and knowledge of managerial standards and</td>
</tr>
<tr>
<td>Corporate strategy</td>
<td>(Prahalad &amp; Hamel, 1990; Quinn, Faerman, Thompson, &amp; McGrath, 1996; Rothwell &amp; Lindholm, 1999)</td>
<td>competence of teams; job-related functional</td>
<td>competencies</td>
</tr>
<tr>
<td>German- Austrian Tradition</td>
<td></td>
<td>skills, underpinning knowledge- Fach- (subject),</td>
<td>To strategically align individual and group</td>
</tr>
<tr>
<td>Education and Training</td>
<td>(Abner, Ungerleider, &amp; Bartosh, 2014; Biemans et al., 2009; Boreham, 2004; Bowden, 2000; Chalkiadaki, 2018; Delamare Le Deist &amp; Winterton, 2005; Hoffmann, 1999; Jeris et al., 2005; Mulder et al., 2009)</td>
<td>Holistic - Collective competence of teams; job-</td>
<td>capabilities with the core competence of the</td>
</tr>
<tr>
<td>French and Finnish Traditions</td>
<td></td>
<td>related functional skills, underpinning</td>
<td>organization; HR strategic development &amp;</td>
</tr>
<tr>
<td><em>This focus is also dominant in current vocational and K-12 education.</em></td>
<td></td>
<td>knowledge- Fach- (subject), Handlungs- (vocation), Personal- and Sozial-Kompetenz</td>
<td>frameworks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Holistic - behaviours, performance standards,</td>
<td>To align individual needs with societal and</td>
</tr>
<tr>
<td></td>
<td></td>
<td>and attributes concerned with different ways of</td>
<td>cultural needs; to accommodate individual input with</td>
</tr>
<tr>
<td></td>
<td></td>
<td>knowing (savoirs): savoir-être, savoir-faire,</td>
<td>performance standards (outputs) and with ways of</td>
</tr>
<tr>
<td></td>
<td></td>
<td>savoir-agir, savoir-vivre or in BC, to know, do,</td>
<td>knowing, being, doing, acting and living</td>
</tr>
<tr>
<td></td>
<td></td>
<td>and understand for success in life beyond school</td>
<td></td>
</tr>
</tbody>
</table>
The research perspectives in Table 1 highlight different perceptions and intentions that have been important for defining competencies in other contexts. The focus on competencies in current curriculum redesign efforts may be influenced by these different perspectives and intentions. However, the needs of K-12 learning communities are different from the needs of management, corporations, and vocational skills training; educators, school districts, and Ministries of Education must work to define this concept based on the perceived needs and intentions in their local and provincial contexts. Given the range of options and who is involved in designing and implementing new curriculum, there is variability in the definitions of competencies and, more specifically, these definitions in relation to learning, teaching, and assessment.

**Concerns with Focusing on Competencies in Education and Training**

The notion of competencies first appeared in European and American secondary curricula for vocational education and training programs in the 1980s, with the aim of providing a more flexible means for credentialing performance (Abner et al., 2014; Biemans et al., 2009; Delamare Le Deist & Winterton, 2005; Mulder et al., 2009). As educators struggled to keep pace with information and communication technology developments, the effects of globalization, and increasing demands for innovative practices, 21st century educational concepts shifted from industrial models to future-oriented, life-long learning. Contemporary K-12 educational reform initiatives turned to the notion of competencies as a broader reflection of the societal aims for education and learning (Bowden, 2000; Chalkiadaki, 2018; Cheetham & Chivers, 1996; Kuchinke & Han, 2005; Les réformes curriculaires regards croisés, 2004; Priestley & Biesta, 2013). In BC’s educational reform, it appeared the lifelong view of learning was also dominant,
based on the *BC Education Plan*’s definition of competencies as “the intellectual, personal, and social skills that all students need to develop for success in life beyond school” (BC Ministry of Education, 2015d).

Changing economics, technologies, globalization, and politics were originally the drivers for competency-based vocational education, but these dynamics were also influencing curriculum reforms in K-12 education (Alberta Education, 2014; BC Ministry of Education, 2013; Ministère de l'Éducation du Québec, 2001; Sinnema & Aitken, 2013). Vocational and trades training programmes were looking for faster, easier, and cheaper means to develop a more flexible and adaptable workforce in an accelerating and shifting world of change (Abner et al., 2014). As groups involved in revising K-12 educational systems looked to the future, many viewed the 20th century industrial models as too rigid to support the flexibility and adaptability students needed for personal, social, and professional life choices and life-long learning attitudes.

To replace these rigid models, several online 21st century learning organizations (ATCS, 2009-2012; iNACOL, 2019; P21) identified economics and the marketplace as the drivers of success and competence. Educational partnership sites like *Competencyworks* (a resource site hosted by iNACOL, the international association for K-12 online learning based in Washington DC) claimed today’s schools lacked the ability to provide individuals with timely, critical knowledge and skills for succeeding in the rapidly changing marketplace of a knowledge-based economy.

Competency-based education has taken hold to help ensure that students have mastered critical knowledge and skills before becoming eligible for graduation or moving on to the next learning target rather than simply occupying a seat for a certain amount of time… Students receive rapid, differentiated support based on their individual learning needs… the process of reaching learning outcomes encourages students to develop
skills and dispositions for success in college, careers, and citizenship. (Marion, 2015, p. 1)

However, this organization neglected to describe which knowledge, skills, processes, and dispositions were critical; who would be providing support; and how they would determine which supports were needed. With the prevalence of technology, there seemed to be an assumption that teachers would be freed from planning and assessing to assist students. Sometimes, there was even an implied notion that teachers might not be necessary. Hyland (1993) challenged these types of all-encompassing, “viciously reductionist, but also utterly naive and simplistic” declarations of rapid acquisition (p. 61). Hyland claimed, “the impact of the competency-based strategy… has, however, reached far beyond the vocational purposes for which it was intended and now extends into just about every sphere of educational activity” (p. 57). Researchers analyzing vocational competence-based training models emphasized how the operationalization of this system in education was potentially reductionist, atomistic, and empiricist; worse yet, it could be used as a mechanism for determining social stratification (Boreham, 2004; Hyland, 1993; Jeris et al., 2005; Jones & Moore, 1993). To understand the implications of how competencies were being considered in K-12 education, I needed to unpack these critiques.

**Reductionist assessment of skills.**

Jones and Moore (1993) warned that reducing competence to a functional analysis checklist of observable actions, broken down for ease of assessment of performance skills, ignored the many human factors potentially at play, as well as the contextual aspects of competence. The resulting performance assessment data risked presenting a technical and simplistic account of what was observed by an individual, oblivious to the
moral, cultural and ethical issues of value, power, and ideology present in the complex social interactions and hierarchy of the workplace. When a teacher marked a math assessment based on whether a response was correct or incorrect, the student had no idea how to correct the mistakes without feedback from the teacher about the mistake made. Therefore, neither the teacher nor the student gained competence.

On a similar note, Jeris et al. (2005) cautioned that “once a tool (in this case, competence) is unleashed, instrumentalism appears to guide application, stripping the framework from its origins” (p. 383). This reductionist view echoed my concern with how the communication competency in the BC Education Plan was originally defined as language, symbols, and digital literacy. If educators focused primarily on the skills associated with language, symbols and digital literacy, then teacher-designed templates emerging to support learning would potentially give greater value to completing a performance skills checklist in these areas, neglecting the more complex observations of social, emotional, and interactive meaning-making inherent to communication.

**Atomistic stacking of credentials.**

Jones and Moore (1993) noted that competency “has no content in its own right, rather it is a device for regulating content in a specific form located in other bodies of expertise” (p. 391). Although Moore and Young (2001) did not speak directly about competency-based education, they pushed for curriculum autonomy “from the instrumentalism of economic or political demands” (pp. 458-459) that resulted in the creation of generic key skills in Britain’s vocational training and education. Further, Jeris et al. (2005) recommended:

HRD [Human Resource Development] researchers and practitioners would do well to interrogate the tool itself and ask, not simply how well is it
working in a given context, but should it be used given its definition and purposes and what are the effects, both intended and unintended? (p. 383)

Indeed, by fusing competence with measurement of input-output efficiency and accountability, teachers may mistakenly give observed performance priority, thereby underestimating the role of knowledge and understanding (p. 63).

Where industry standards and workplace training determined relevant knowledge – skills and abilities employees needed for a particular job in trades or professions – competencies were becoming a new form of credentialing (Rose, 2017). The Canada West Foundation published a report, titled *Competence Is The Best Credential* (Lane & Christensen, 2015), signalling that “being able to prove that you have the competencies required to do the jobs that are available could be a more cost effective way to achieve job market success” (p. 7). The authors described how “stacking competencies is faster, easier, and cheaper than heading back to school for another credential” (p. 8), suggesting “as major subsidizers of training, governments benefit further if the training is accomplished in a shorter time and at less expense… employers will become more productive, the economy will grow, and government will collect more revenue” (p. 10).

There are potential benefits and dangers to grouping specific skills into credentials for employers. Stackable credentials—like certificate programs, targeted work experience, and training—allow individuals to upgrade their qualifications over time without having to leave their employment to return to school. In today’s knowledge management markets, where workers have to be flexible and adaptive lifelong learners, a “job for life” is no longer an option for most graduates. As some universities and colleges are beginning to credit prior learning and career experience, others are offering a mix of required and elective courses for certificate programs. Stackable credentials are an
attractive way to increase flexibility in training programs. When time and money are factored into a market-driven economy, flexible training models for improving specific areas of competency seem appropriate.

However, critics often ask what is gained or lost when learning modules like online courses and self-directed studies replace the face-to-face interactions between educators and students in classrooms. Can learning be equated to the quantity of courses, units or accumulations of credits? Should atomistic models built by employers for adult learning drive learning in K-12 education?

**The power of empiricist priorities and values.**

If stackable credentials are to improve skills in the workplace, to what extent are future employers involved in setting the criteria and assessing learning credentials in K-12 education? It is understandable that competency definitions are being debated; those who create the categories hold the power. Researchers are particularly concerned with the empiricist impact of the National Vocational Qualifications (NVQ) first introduced in Great Britain in 1986 (Hyland, 1993; Jones & Moore, 1993; Moore & Young, 2001).

Jones and Moore (1993) noted the “promotion of competency over the past decade has been characterized by the production of techniques for describing and assessing skills and performance” (p. 387). When employer-appointed experts conduct technical monitoring, assessing, and measuring of occupational competency, these experts generally prioritize the interests of the employer, and assume there is transparency and common understanding for the employee. Judgments of competence made by technicians using inventories, performance indicators, and profiles may appear justifiable when perhaps they are not (Jones & Moore, 1993). Judgments of others could
have powerful repercussions. With a slight shift in focus during an assessment, an employer could have the power to change the criteria used to hire or fire employees based on the employer’s estimation of “best fit” for the employer’s fluid criteria. How employees are assessed could indicate whether the system is operating from an empiricist, top-down model or an expansive and collaborative learning model.

In BC’s K-12 education system, an emerging question for educators has been how to effectively report on student competencies. How the Ministry of Education and local school districts define competencies and design reporting templates and data collection is often a reflection of the dominant beliefs and values of the groups designing the templates. Those designing the templates then assume there is consensus among educators about their use. As educators have different beliefs, values, and understandings of competencies, how the templates are used in each classroom varies.

**Inequities and social stratification.**

Jones and Moore (1993) exposed issues of ideology and power where competency was seen as a means to control expertise, first by classifying, ranking, and ordering expertise, and then by regulating the position of individuals within this hierarchy. Thus, from an input-control perspective, competence-based education could be a gate-keeping mechanism to stream students in their formative years into programs based on a technical assessment of their perceived capability for performing specific tasks. On the side of output-control, competency-based education might be used to control certification and regulate expertise (Jones & Moore, 1993). For example, if a vocational trainee had to enrol in a series of skills certification courses, the trainee usually paid for each credential,
potentially adding an economic barrier. In contrast, apprenticeship models were usually subsidized and served to develop holistic on-the-job competencies.

With both input- and output-controls, when assessing the capability (whether it be potential or real) of an individual to perform a role, the evaluator generally made judgments based on contextually- and culturally-situated observations. Traditional forms of assessing outcomes were ill-equipped to take into consideration the place-based strengths of many immigrant students. The same was true for input assessments of a child’s suitability for a given program. Some students were at risk of being marginalized if the evaluator was not equipped to consider cultural and linguistic diversities. Herein resided a potential for misinterpretations, or worse, misuse of power and control.

As school districts attempt to address systemic inequities, they need to question how their focus on competencies is increasing learning opportunities for all learners, not only those belonging to select groups. Exploring the attractive ideal of personalized learning, districts need to ask if this notion is increasing or decreasing social stratification. In BC, parents choose between public and independent schools. However, the range of choice is broader for some families than for others. Socio-economic, political, cultural, and geographical factors affect the choices and options being touted as positive aspects of personalized learning. If competencies are used to assess potential and then to control access, they might negatively affect the dignity and motivation of some learners and narrow learners’ options for success.

Similarly, educators’ intentions and experiences shape their interpretations of competencies. As educators encourage students to report on their expanding core competencies in the areas of critical and creative thinking, communication, personal and
social identity, awareness, and responsibilities, would they suggest and recognize
demonstrations of competencies that fall outside of their personal realms of experience?

Given the wide range of options for focusing on competencies, when educators
attempt to provide feedback on student progress, they may struggle with what to choose.
Out of necessity, they may apply a reductionist lens to select criteria for reporting on
learning and organize their criteria by applying an atomistic lens. Where criteria
determine access to other levels of education and training, sometimes the choice relied on
an empiricist lens. With each choice, there are also questions about the effects of social
stratification. With no shortage of literature criticizing the reductionist, atomistic,
empiricist, and social stratification approaches to competency-based education (Hyland,
1993; Jones & Moore, 1993; Wheelahan, 2012), could a competencies focus encompass
deeper, more meaningful, more diverse, or more relevant aims for education and
schooling? What are the perceived benefits of this 21st century move to explore
competencies in education?

**Benefits of a Competency-Based Approach in Education**

When researchers point to the benefits of competency-based education (Abner et
al., 2014; Boreham, 2004; Bowden, 2000; Chalkiadaki, 2018; Cheetham & Chivers,
1996; Jeris et al., 2005; Kuchinke & Han, 2005), many understand competency as a
holistic continuum of reflection and action in complex individual and societal contexts.

**Global and societal aims.**

UNESCO’s focus on 21st century learning captured the deeper aims of
competencies in its report, *Learning: The Treasure Within* (1996b), citing how global and
collective educational aims of a learning society were founded on four pillars: “learning
to live together, learning to know, learning to do and learning to be” (p. 37). While Delors (2013) acknowledged the challenges and tensions between the global and the local, the universal and the individual, competition and equal opportunity, he continued to stress the central role of education “as a school of tolerance that teaches us how to live side by side with other people, wherever they come from” (p. 329). Perhaps this 21st century emphasis on competencies underscored a sense of global responsibility, as suggested by Chalkiadaki (2018) who said that “education has also been charged with a more essential core responsibility, that of constructing a culture of peace and tolerance in a world of constant political, social, geographical, economic and conceptual changes” (p. 3). In K-12 education, where career training is not the only aim, the holistic cultural, societal, and relational aims of competencies in education merit further exploration.

**Culturally situated aims.**

In Francophone societies, cultural and collective values placed on the different notions of understanding are signified by “les savoirs” (savoir-faire, savoir être, savoir agir, savoir vivre), and their associations with “compétence” go deeper than simply “knowing.” In French, it is possible to know of someone or know about something as signified by the verb “connaître” without having this deeper understanding or “savoir.” The value placed on demonstrating reasoning and understanding by doing, being, acting, and living in cultural and social relations with others is greater than that placed on demonstrating a vessel-filled accumulation of knowledge. This emphasis on “les savoirs” might be construed as a means to protect a country’s cultural integrity in international spheres (Delamare Le Deist & Winterton, 2005; Jeris et al., 2005).
Boreham (2004, p. 6) pointed out that most societies embody both individualist and collective traditions. At the individual level, a focus might be on student-centred learning, differentiated instruction, and advancing through mastery and demonstration of learning (Sturgis, 2016). However, systemic approaches have different educational aims that tip the scales in favour of societal needs. In Germany, “Kompetenz” has long been valued in multiple forms, through work, personal, and social contexts. Children are assessed in elementary years in order to stream students efficiently into high schools (Hochschule) oriented toward trade schools and apprenticeship programs (Berufschule) or to university prep schools (Gymnasium). All students are expected to graduate with varied competence in order to contribute meaningfully to different aspects of German society. This dual-track streaming approach is sometimes criticized for its early assessment of individual potential. Biemans, Poell, Mulder and Wesselink (2004) claimed that “[in] recent German and Dutch discussions on competence-based education, a more holistic approach is advocated, to overcome the risks of the disintegrative approaches. In these discussions, competence is regarded as the integrated abilities required to cope with complex tasks” (p. 528). When individuals and collectives worked together to become more competent in complex learning environments, disintegrative approaches shifted toward mutually beneficial, supportive, and integrated learning relationships.

Even those who resent the influence of “neo-liberal” markets, economics, and politics on local ways of knowing, recognized that individuals require competence to be adept at “coping with uncertainty, taking calculated risks, [and] making deliberate but informed choices” (Biemans et al., 2004, p. 535). Reviewing skills and competencies described in 21st century research literature, Chalkiadaki (2018) referenced how teams
needed to be able to work together and learn to deal with conflicts with an open mind in diverse heterogeneous environments. Despite potential pitfalls, proponents of holistic, competency-based education were attracted by deeper opportunities for action through culturally diverse learning environments for students’ and workers’ local and global contexts. In Holland and Denmark, vocational training often includes learning opportunities for students to spend time in other countries. As learners gain greater multi-lingual communication proficiency, they expand their personal global awareness of diversity and, at the same time, enrich their nation’s collective competencies.

Aims of life-long, adaptive, and expansive learning.

In K-12 educational reform across jurisdictions, competencies have been increasingly viewed as a continuum of life-long learning (BC Ministry of Education, 2018b; Bowden, 2000; Hoffmann, 1999; Ministère de l’Éducation du Québec, 2001; Woodruffe, 1993). Entry-level competencies are seen as an indication of the degree of one's ability to perform basic, technical, or skill-driven steps within specific contexts. However, with increased experience, expertise, and professionalism, individuals become more competent at determining which skills and knowledge to activate when, where, how, and why. By focusing on holistic, collective and personal multi-dimensional and meta-competencies, like Boreham (2004), Bowden and Marton (1998) looked to competency-based education as a means to improve the “capabilities of seeing and handling novel situations in powerful ways, capabilities that frequently integrate disciplinary and professional knowledge” (p. 113). In seeking to better connect practice, knowledge, relevance, and contexts, Bowden (2000) proposed, “a competent person knows what aspects of their knowledge and skills are relevant to the situation” … and “is
able to discern and be aware of all relevant aspects of the phenomenon and of the situation simultaneously” (p. 11). This seems daunting at first glance, but when individuals learn to ride a bike, drive a car, solve a conflict, or prepare a meal following a recipe book, they are usually capable of describing where they fall on the competency continuum for each situation, in both familiar and unfamiliar contexts. Researchers seemed intrigued with competencies as a means to explore the potential of flexible, self-motivated, innovative, and relational learning.

Recognizing that reflection, intuition, collaboration, and experience applied to teams working together are complicated interactions to observe and that richness and complexity develop over time, Kuchinke and Han (2005) proposed a four-part model of professional development with competency at the beginning, followed by proficiency, global development, and finally, expertise. They made the distinction that:

Compotent behaviour requires situation-specific and context-dependent responses and the ability to gage situational variables to draw from a range of alternative possible actions. Professional expertise requires the ability to examine situational variables critically and often to arrive at pareto-optimal solutions, rather than rote applications of competencies. Competency frameworks, thus, are suited as the beginning rather than the end of professional development. (p. 387)

To support students with assessing personal progress based on some form of competency continuum, educators need to be able to examine the discourse of core and curricular competencies in relation to their professional learning and school district assessment contexts. To develop collective understandings and grow as a community of professionals, educators also need opportunities to examine their professional competencies and their learning needs.
Generic assessments of performance output measures are insufficient in societal contexts where individuals are expected to work collectively and collaboratively. Kuchinke and Han’s (2005) four-part model and other holistic views on assessing competency are more easily applied to professional judgments and collective efforts to create complex products or processes. To this end, school districts have been attempting to develop professional learning assessment models that reflect quality standards and personalized goal setting to expand employee competencies. However, in some situations it is possible educators do not feel supported in taking risks and collaborating with colleagues or with their employer in expanding their competencies. Social, political, cultural, and economic underpinnings influence how educators view their varied and shifting personal, social, and contextual learning situations in relation to competencies.

**Aims for deeper collective understandings.**

Bowden’s (2000) hierarchy of competency-based practices, along with Kuchinke and Han’s (2005) competency-to-expertise continuum, is built on contemporary views of competency-based education (Chalkiadaki, 2018; Cheetham & Chivers, 1996, p. 27; Delamare Le Deist & Winterton, 2005, p. 40; Pepper, 2011). Even though these researchers used different terms to define competencies in different contexts, the emerging holistic and dialectical conceptions are that competencies are:
- Cognitive (accessing knowledge, information, communication, and experience),
- Functional (applying skills and know-how, including digital literacy),
- Personal (involving reflection, analysis, self-development, creativity), and
- Relational (considering social, ethical, and personal impacts, problem solving).

For outcomes-based thinking that tends to focus on parsing performance into specific skills, knowledge, aptitudes and attitudes, it is challenging to accept that holistic, life-
long views of competency-based education cannot be operationalized through a generic fixed outcomes model.

Pepper (2011) suggested that assessing key competences across the curriculum requires innovative responses that involve “specifying or ‘unpacking’ key competences and ‘mapping’ them to contexts” (p. 335), and then using new and existing methods to access information about learners’ development. In BC’s Education Plan, there has been an attempt to do this by distinguishing between curricular competencies (the specific cognitive and functional content area knowledge, skills, and processes) and core competencies (more holistic cognitive, functional, personal, and relational competencies that enable students to be lifelong learners).

In BC’s new Student Reporting Guidelines, this shift in focus was evident in the move away from summative grading of standardized outcomes toward an ongoing assessment and reporting model. This model includes four elements: curricular learning standards, authentic samples of student work, teacher feedback, and student reflection on learning (Government of British Columbia, 2016). As school districts changed their reporting structures and adopted competency continuum reporting terminology (emerging or beginning, developing, proficient, and extending), educators began to realize these terms were not mere replacements of letter grades and percentages. Within a competency continuum, these terms reflected a notion of students on a continuous learning journey. However, this notion is not yet well understood by educators, students, parents, and the broader society.

Boreham (2004) moved beyond individualistic models of competence to encompass collective competence, where acting competently involves “making collective
sense of events in the workplace, developing and using a collective knowledge base and developing a sense of interdependency” (p. 9). He presented collective competence as a means to challenge the individualistic occupational workforce trends in the UK: not to polarize them but to balance them. In short, when individuals work to become competent in safe, challenging, collaborative and interdependent environments, both the individuals and the collectives benefit from this mutually constitutive relationship (Boreham, 2004, p. 15). The challenge is to set aside time, to create spaces, and to explore processes for building individual and collective competence in the busy world of education.

In a competent collective, many minds work effectively together to accomplish a common aim or vision. For example, Boreham (2004) described a flight crew’s need for well-orchestrated collective thinking and actions. In another example, Roth (2014) presented a case study describing how one airline company worked to bridge the competency gap between its training courses and pilots’ actual experiences with flying their planes. Roth’s point was to demonstrate the benefits of closely aligning the competencies of the practice activity system with the object and motive of the actual flying activity. It is easy to imagine how important this notion becomes in environments like operating rooms, research centres, or construction sites, as well as in classrooms, schools, and districts. The challenge is how to align and implement intentional processes, structures, and shared responsibilities so members teach and learn from each other in ways that expand their collective competencies.

**Co-Constructing Collective Competencies**

Competency-based education, as Bowden (2000) described it, is neither a panacea nor a pariah. He calls on educators to develop students’ capacity to discern what is
relevant and what is known about novel situations. Biemans, Wesselink, Gulikers, Schaafsma, Verstegen and Mulder (2009) urged educators to deal with the potential pitfalls of the relevant and the novel through an open-school culture with careful planning, design, implementation, and reflection. Jeris, Johnson, Isopahkala, Winterton, and Anthony (2005) suggested:

If we think about the situated nature of diverse applications of the competence concept as philosophical problems for applied fields, then we can begin to think about their aims in relationship to their context, the accompanying teaching-learning dilemmas and program development issues and problems – all highly relevant issues for practitioners, stemming from theory that has not kept pace with changes in practice. (p. 383)

As stated, educators need to think about this concept of competencies in the K-12 curriculum in BC in relation to the aims of provincial and local contexts, with consideration to how a focus on core and curricular competencies will improve learning. Prior to the arrival of the new curriculum, educators were already actively exploring shifts in learning intentions, contexts, and strategies. The competencies focus of the new curriculum helped participants in this current study to co-construct their collective conceptual, practical, and contextual understandings of their local practices, while also expanding their individual and collective competencies.

Changes to curriculum also imply changes to how knowledge is shared and passed on to future generations. Even though Ozga and Jones (2006) did not refer directly to competencies, they did reflect on contemporary knowledge transfer. Their perspectives get to the heart of the concerns around competency as merely an economic driver for global markets. How do societies transfer increasingly complex knowledge, skills, and attitudes? What is being lost in the transfer? Just as Bowden (2000) demonstrated with a
progression in the perceptions of competencies, Ozga and Jones (2006) referred to a shift from traditional linear models of knowledge production and dissemination to an “interactive, iterative, problem-focused, trans-disciplinary model” (p. 8). They stressed the need to move away from knowledge as a commercial construction toward including local knowledge (traditions, histories, social relations) that “can promote critical political and social awareness and understanding” (p. 8). In this sense, knowledge is viewed as a situated cultural and historical construction.

To expand on this notion of competencies as a collective co-construction, I relied on Crotty’s (1998) definition of constructionism as “the view that all knowledge, and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context” (p. 42). Meaning-making is a dynamic, interactive process between people and their environment. Historical, social, and cultural environments differ. Thus, depending on what individuals bring to the change process, contrasting beliefs, perceptions, understandings, and intentions may shape the group’s activity and outcomes.

In the current study, for example, including local knowledge and Aboriginal understandings in the BC Education Plan has the potential to expand both local views and worldviews. At the local level, district and school initiatives may focus on competencies through collaborative inquiry to value local understandings, issues, and actions. From a national context, the Truth and Reconciliation Commission might be viewed as an attempt to expand collective competencies by valuing the traditions, histories and social relations with Aboriginal peoples. Instead of coming away with one
clear definition of competency that applies to all contexts, as educators engage with the new curriculum from the context of their school districts, their intentions and interpretations about competencies may differ.

Crotty (1998) described how intentionality brings to the fore the interactions between subjects and objects. He viewed intentionality from its Latin root, *tendere* (to tend) and suggested that “in-tending” was about “reaching out into” just as “ex-tending” was about “reaching out from” (p. 44). As educational leaders interact with the new curriculum, they may attempt to extend their understanding by starting from the previous curriculum. However, as they explore the intentional changes of the new curriculum, their locally constructed understandings become the focus for reaching out toward future teaching, learning, and assessment practices.

If systems are to move away from treating learners as beginners (or vessels to be filled), and move instead toward valuing each learner as an important contributor with experiences that help to shape the learning collective and society, educators need to examine the power relations and intentions driving this shift. Through this change process, various power relations – embedded in the historical, social, and cultural relationships between the local, provincial, and global contexts – can be best understood by examining how individuals co-construct their collective understandings in relation to their experiences and intentions. This is the subject of the current study.

**Summarizing Research Perspectives of Competencies**

Research perspectives on competencies vary. To summarize these diverse perspectives, I used Janssen-Noordman et al.’s (2006) common elements of competencies (see Table 2, column 1). These elements allow for a basic understanding of how
individuals might develop competencies in a linear progression for task-specific learning (see column 2). Focusing on linear, task-specific competencies, individuals develop their ability to perform technical or skill-driven actions within specific contexts to expected standards or pre-determined outcomes. However, these same elements also encompass the more agentic, iterative, and interactive expansions of individual and group competencies in relation to multiple and varied contexts (see column 3). While both linear and iterative perspectives have value, the iterative and agentic view is more open-ended and adaptive.

Table 2

*Common Elements of Competencies: Linear and Iterative Perspectives*

<table>
<thead>
<tr>
<th>Common Elements of Competencies (Janssen-Noordman, Van Merriënboer, Van der Vleuten, &amp; Sherpbier, 2006)</th>
<th>Linear progression of competencies: (Biemans et al., 2004; Boyatzis, 2008; Lane &amp; Christensen, 2015; Marion, 2015)</th>
<th>Iterative, agentic, and holistic view of competencies (Biemans et al., 2004; Cheetham &amp; Chivers, 1996; Delamare Le Deist &amp; Winterton, 2005; Janssen-Noordman et al., 2006)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competencies are connected to activities and tasks.</td>
<td>Activities and tasks are aimed at pre-determined purposes or outcomes.</td>
<td>Individuals and groups determine activities and tasks to resolve problems with unknown outcomes.</td>
</tr>
<tr>
<td>Competencies are context-bound.</td>
<td>Competency protocols are designed for a specific context.</td>
<td>Groups can adapt to the unique aspects of the local context (local culture, history, practices).</td>
</tr>
<tr>
<td>Competencies are indivisible; integrate knowledge, skills and attitudes (KSA).</td>
<td>KSAs are assessed to focus on specific areas for improving performance.</td>
<td>Groups analyze complex cognitive, functional, and social patterns to improve knowledge, processes, and understanding of practices.</td>
</tr>
<tr>
<td>Competencies are subject to change.</td>
<td>Individuals are retrained as protocols, tools, and outputs change.</td>
<td>Individuals have the flexibility and adaptability to interact and contribute in changing situations.</td>
</tr>
<tr>
<td>Competencies require learning and development processes.</td>
<td>Learning and training are seen as sequential steps along a linear continuum.</td>
<td>Learning is iterative and shaped by the ability to gage situations, variables, manage risk, and cope with uncertainty.</td>
</tr>
<tr>
<td>Competencies are interrelated.</td>
<td>Learners build expertise by focusing on relating separate modules within specialty areas.</td>
<td>Cognitive, functional, personal and social competencies are core across all domains.</td>
</tr>
</tbody>
</table>
With an iterative and agentic view of competencies, individuals become more proficient and competent in determining which skills, knowledges, and attitudes to activate when, where, how, and why. This agentic view of competencies allows individuals and groups to be flexible and adaptable in applying their competencies in multiple contexts where possible outcomes are unknown.

In this chapter, I examined the research literature to inform my understanding of the evolution of competencies within the K-12 education system. While the literature helped highlight some of the concerns and benefits of a competencies approach to learning, I found limited research describing how competencies were understood both conceptually and practically by educators in K-12 education. The new competencies focus of BC’s redesigned curriculum provided an ideal opportunity to examine how educators were co-constructing their understandings of this concept. In BC, if the intention of a competencies focus is to stimulate changes in educational practices, then it is not sufficient for educators to go through the motions of operationalizing the Ministry of Education definitions of competencies in BC’s redesigned curriculum. If competencies are to foster flexible and adaptive individual and collective learning, educators need to co-construct understandings of competencies to be able to engage learners in reflecting, communicating, and interacting with the big ideas of the redesigned curriculum.

In Chapter 3, I describe the theoretical and conceptual research frameworks I used to study how educational leaders in our local K-12 context were experiencing this new focus on competencies as part of the curriculum change process.
Chapter 3 Activity Theory and Expansive Learning

Engeström’s (2010) development of the frameworks of activity theory and expansive learning is useful for this study because the “theory of expansive learning puts the primacy on communities as learners, on transformation and creation of culture, on horizontal movement and hybridization, and on the formation of theoretical concepts” (p. 74). Methodologically, I focus on formative intervention research in educational contexts (see Chapter 5). For this formative intervention study, I identified key elements to consider in working with educators on shifting teaching, learning, and assessment practices in relation to the focus on competencies in the BC Education Plan, the redesigned curriculum, and the Ministry’s new Student Reporting Guidelines.

Theoretical Concepts of Activity Theory

Activity theory emerged from Leont’ev’s efforts to extend Vygotsky’s (1978) experimental studies on how human actions toward an object or motive often use mediating instruments to stimulate changes, such as “signs” on an individual level or “tools” on an environmental level. Unfortunately, these instruments may also instill fear, conflict or discord, causing learners to retreat into safe spaces and comfort zones, or even turn on peers in anger or in frustration. For educational leaders, this presents a moral and ethical challenge when attempting to change educational practices, and also when inviting colleagues to access and design systemic supports.

A common theme in this study was educational leaders’ concerns with finding balance in working to promote change among colleagues, in terms of knowing when to push and challenge colleagues to expand understandings, and when to leave space for them to reflect on and deepen their learning. I found it helpful to return to the foundations
of activity theory, sometimes also referred to as cultural historical activity theory or CHAT (Daniels, 2004; Ellis, 2011; Fenwick, Edwards, & Sawchuk, 2011b; Postholm, 2015; Roth & Lee, 2007). Revisiting these foundations brought fresh perspectives on how contradictions and tensions are rooted in situated cultural and historical experiences, and the ways in which societies use mediating means to stimulate and transform learning.

**Using mediating instruments to stimulate expansive learning.**

Vygotsky (1997) demonstrated how *signification* (the use of signs) was responsible for activating higher mental functioning beyond simple stimulus-response actions. He described how, in a state of indecision, an individual might deliberately seek help from “artificially introduced auxiliary motives or stimuli” (p. 46) like the roll of a die or the toss of a coin. In other situations, an individual might notch a piece of wood, tie a knot in a handkerchief or use fingers to count when they do not trust their ability to remember. Just as tools support manual activities, Vygotsky claimed, “the use of auxiliary devices, the transition to mediated activity radically reconstructs the whole mental operation… and it broadens immeasurably the system of activity of mental functions” (p. 63). Crediting Vygotsky with this first generation of activity theory (see Figure 2), Engeström (2001) described Vygotsky’s cultural mediation of actions as “a triad of subject, object, and mediating artefact” (p. 134).

![First Generation Activity Theory Based on Vygotsky’s Mediated Activity](image)

*Figure 2. First Generation Activity Theory Based on Vygotsky’s Mediated Activity*
Engeström (2010) also referred to these mediating artefacts as “instruments (tools and signs)” (p. 78), calling them a central element of activity theory because of their role in stimulating higher mental functioning and expansive learning. For example, in a classroom, a teacher might present students with a demanding task, a first stimulus, by challenging them to multiply two numbers. To support the task, the teacher might give students graph paper and bingo chips (a neutral second stimulus), asking the students to arrange the chips on the graph paper in different ways, with one chip in each square. Using eight bingo chips, the students might arrange one row of eight chips (1 x 8) or two rows of 4 (2 x 4) or 3 rows of 2 with 2 extra (3 x 2 + 2). Instead of simply answering a series of multiplication questions like 2 x 4 = x, students begin to see potential arrays and algebraic equations that deepen understandings of math symbols and processes. Mediated processes are aimed at activating higher levels of thinking.

Mediating instruments might seem neutral, but they emerge from communities’ beliefs and practices about the role of activity systems in learning. A key premise of activity theory is that individuals and collectives create and access mediating instruments to stimulate change within themselves and to their contexts. Children develop their understanding of the world by actively participating in the dynamic social systems of their environment. In educational activity systems, adults and competent peers stimulate learners’ zones of proximal development by selecting instruments that bring deeper understandings of cultural and historical contexts to this learning dynamic (Vianna & Stetsenko, 2006).

In this study, I use the term mediating instruments to focus on the tools, models, ideas, signs, processes, resources, and strategies employed in education to expand or lead
to new understandings for both individuals and collectives. Mediating instruments help individuals and groups activate their zones of proximal development (ZPD). Vygotsky (1978) defined ZPD as “the distance between the actual developmental level as determined by independent problem solving and the level of potential development as determined through problem solving under adult guidance or in collaboration with more capable peers” (p. 86). He focused more on interactions between learners and guiding adults than on interactions with peer mentors.

Engeström (1987) adapted Vygotsky’s notion of ZPD to collectives by defining ZPD as “the distance between the present everyday actions of the individuals and the historically new form of the societal activity that can be collectively generated as a solution to the double bind potentially embedded in the everyday actions” (p. 174). A double bind is a state where old models are obsolete and new models have not yet been created. Engeström (2010) further refined his definition of ZPD within and across activity systems as “the space for expansive transition from actions to activity” (p. 76). In our district, educators were questioning assessment differences between “applying” and “extending” competencies. Where students in the past were encouraged to complete teacher-directed tasks to get a good mark, now students’ options for demonstrating how they were applying their understandings had become more open-ended. In expanding learners’ choices for how they might extend their learning and share it with peers, the collective learning of the group was expanding, too. These ways of knowing, doing, and understanding exemplified how multiple actions accomplish the object of an activity.

To stimulate and support learning, educators draw on mediating instruments such as curriculum materials, learning resources, technology supports, formative interventions,
training, and professional collaboration. From this perspective, the *BC Education Plan*, with its focus on competencies, is a provincial mediating instrument stimulating changes in education. The new *Student Reporting Guidelines* (2016) is another stimulus for changing practices. These policies and guidelines, emerging from interactions between the province, local communities, and other external systems, motivate educators to access and create local instruments that support their learning and that of their students. How these local instruments are then defined shapes implementation practices in districts across the province. With the current interactive approach to BC’s educational redesign initiatives, locally developed solutions are emerging to replace practices and models that no longer fit with the newly introduced stimuli.

**Recognizing how rules and roles shape collective activity.**

Where Vygotsky focused on mediating student learning through interactions with teachers, Leont’ev (1978), Vygotsky’s student and colleague, expanded activity theory to distinguish individual *actions* from collective *activity*. In one example, Leont’ev described how the individual actions of hunters beating bushes to chase an animal *away* might appear contradictory to the collective activity of providing food for the community. However, for the tribal hunt to be successful, strategic division of labour required some hunters to chase the animal *toward* other hunters waiting with spears. Division of labour, as a basis of collective activity, has its roots in Marxist ideas about understanding human activities practically rather than ideally, in terms of real production and satisfaction of generalized needs (Engeström, 2010, p. 76; Roth, 2014, p. 525).

Incorporating Leont’ev’s views on division of labour in a collective activity system, Engeström expanded Vygotsky’s mediated activity into a framework that he
called Second Generation Activity Theory (see Figure 3).

Figure 3. Second Generation Activity Theory (Engeström, 1987, p. 78)

This framework emphasized the significant cultural and historical contributions of community (or communities), rules, and division of labour in shaping the outcomes of activities between subjects using instruments to achieve an object or motive.

Acting within multiple environments, individuals inhabit many roles as they go about their lives. Within these roles and responsibilities, there are horizontal divisions of tasks or actions and vertical divisions of power and status (Feldman & Weiss, 2010, p. 37). These power dynamics and status divisions between community members shape the rules and processes for dividing tasks and actions. Relevant to this current research, a curriculum change initiative like BC’s is an opportunity to observe and question how power, resistance, contradictions, and agreements emerge and shape actions, activities, and outcomes between members of local learning communities. Curriculum change is a dynamic process and interactions between people shape change.

In education, it is often challenging to grasp the “hidden curriculum” of underlying and often unspoken beliefs, norms, and conventions that have developed over time into the dominant culture of the school. Further, “both implicit and explicit rules act
as constraints and affordances within activity systems. Rules can be regulations, norms, conventions or other types of beliefs” (Feldman & Weiss, 2010, p. 37). The implicit and explicit rules constraining or supporting educators may vary as they attempt to co-construct their understandings of competencies. Interwoven with educators’ efforts are their perceptions and experiences within the system. When a system undergoes significant changes, it is common for educators to be confused about the changing rules and roles as they work with students, colleagues, and district committees.

In this study, though educators shared a loosely defined vision of improving student learning, their perceptions of the object of this district-wide activity varied. The district’s engagement with its learning communities in defining its rules and roles – and the support of individuals and collectives with these rules and roles – affected the energy, effort, and commitment of participants in the system. Similarly, interpretations of rules and roles differed among members within and across the systems of each school.

**Co-constructing the object of collective activity.**

Engeström (2001) described object-oriented actions in collectives and networks as “characterized by ambiguity, surprise, interpretation, sense making, and potential for change” (p. 134), where the object of activity is a “moving target, not reducible to conscious, short-term goals” (p. 136). By encouraging educational leaders to share their ideals and challenges in the current study, I saw potential for broader co-constructed understandings of competencies to lead to greater impact on local practices.

Activity theory highlights how mentors and learners draw on mediating instruments, in the form of cultural tools and signs, to socially co-construct their visions and act on these to work toward future outcomes. Vianna and Stetsenko (2006) describe
how social and cultural practices are grounded in a dialectical view of history where “the past, the present, and the future are blended and always contained in each other” (p. 89). They emphasized that learners, through their activities, are also co-authors of this development because they are immersed “in the ongoing, continuous flows of collaborative practices… that extend from the past and exist prior to each individual learner and each individual community” (p. 102). Vianna and Stetsenko (2006) presented history as “a continuous flux of social practices, to which each generation contributes, while inevitably transforming it” (p. 82). While Vianna and Stetsenko refer to this notion as social constructivism, Crotty (1998) suggests reserving the term constructivism for the meaning-making activities of the “individual mind” and differentiating constructionism to emphasize “the collective generation and transmission of meaning” (p. 58). In the current study, I use co-construction to describe the process that the participants and I undertook to define and elaborate the notion of “competencies” in the BC education context.

Engeström (2007) described how the term object “embodies the meaning, the motive and the purpose of a collective activity system” (p. 337). Vygotsky had originally used the term predmet instead of objekt. Even though both terms translate to object in English, predmet relates “to a broader social need, sense and relevance” (Fenwick, Edwards, & Sawchuk, 2011a, p. 65). This broader meaning takes into consideration the upward and downward flows that connect and embed local processes within the structures of society. In BC, the notion of competencies is still a moving target. The definitions of core competencies are shifting as educators work through the curriculum implementation process. Even as the categories of core competencies (thinking,
communicating, social, and personal) have remained constant, within these categories the emphasis may change depending on the visions of local districts and school activities.

Systemic rules and power dynamics are interwoven both within an activity system and between activity systems with a potentially shared object. Engeström (2001) explored the potentially shared objects of interacting activity systems by expanding the activity theory framework to its third generation (see Figure 4).

![Image of Third Generation of the Activity Theory](image)

**Figure 4.** Third Generation of the Activity Theory (Engeström, 2010b)

To provide an example of how third generation activity theory is applied, in his project *Learning for and in Interagency Work* in England, Daniels (2004) identified how various agencies shared the object of reducing the exclusion of marginalized secondary students. These agencies came together in search of new ways to work together professionally and with students through more interdependent co-configurations and strategic alliances that moved beyond conventional teamwork. Daniels referred to these co-configurations as *knot-working* “a rapidly changing, distributed and partially improvised orchestration of collaborative performance which takes place between otherwise loosely connected actors and their work systems to support clients” (p. 193).
In our district, the principals’ task force was an example of knot-working, as loosely organized pods of members collaborated to bring new instruments to monthly principals’ meetings to stimulate professional learning discussions. For this study, knot-working was evident in the strategic alliance of educational leaders as they co-constructed their understanding of competencies; then untied their connection to this group to return to their roles across the district, adapting the understandings gained in this group to their work contexts.

Schools, districts, and the Ministry of Education are intersecting systems that differ in their educational approaches because of their unique contexts, roles, and division of labour. Their shared object of improving student learning is defined by the manner in which these various systems elect to work toward this shared object. Therefore, individual schools and departments in a school district might differ in their actions, even though they share or are guided by a unifying district object or motive. Roth and Lee (2007) noted that networks were both enriched and complicated by contradictions in motive, dialogue, multiple perspectives, and issues of power. My interest in bringing together educational leaders from multiple sites increased the complexity of this study, but these diverse contexts offered an opportunity to enrich the competency discourse as participants shared their varied experiences from multiple worksites across the district.

**Formative Intervention Research and Expansive Learning**

Given my aim to work with educational leaders to explore their understandings of competencies in the new curriculum, the studies based on formative intervention research (FIR) methodologies and Engeström’s cycle of expansive learning seemed most relevant (Ellis, 2011; Engeström, 2010, 2015; Engeström & Sannino, 2010; Postholm, 2015). In
these studies, researchers worked with participants to analyse the tensions within their activity system, and then used these historical contradictions to develop new models and tools to shift and transform practices toward the object of their activity. Formative intervention research, evolving from activity theory, aims to bring together individuals and researchers for the purpose of examining contradictions within challenging contexts to imagine and act on solutions beyond those possible when working in isolation.

Formative intervention research goes by many names because research teams have created their own intervention models and processes for contextualized purposes. Engeström and colleagues used formative intervention research to support health care, business, and educational organizations within their Change Lab (2007; 2014) and Developmental Work Research (DWR) models (1987, 2001, 2010). Daniels and Edwards applied intervention research toward better supporting students accessing multiple agencies through their project Learning in and for Interagency Work (LIW) (2004; 2012).

Often teams conducting formative intervention research are outsiders working with representatives from groups to resolve systemic contradictions within or between organizations. However, Ellis (2011), Roth and Lee (2007), and Fire and Casstevens (2013) worked from an insider stance working with students, teachers, and curriculum to observe interventions and transformations over time. These formative intervention research studies built on systemic objects—increasing professional creativity, supporting student restoration of a creek, and fostering more constructive learning environments—to improve learning using the theoretical framework of activity theory.

In their research project with secondary students in Victoria, BC, Roth and Lee (2007) described how students formed a collective identity, “producing themselves as
active participants and learners within the environmental movement while realizing
greater collective agency or competency than they could have achieved as individuals”
(p. 216). Engeström (2010) described collective agency as one of the three defining
characteristics of formative intervention research. Participants construct novel concepts,
they negotiate and shape the process, and they gain agency by developing new concepts
to generate solutions in other settings. Engeström suggested, “In expansive learning,
learners learn something that is not yet there. In other words, the learners construct a new
object and concept for their collective activity, and implement this new object and
concept in practice” (p. 74). Daniels (2004) defined expansive learning as “the capacity to
interpret and expand the definition of the object of activity and respond in increasingly
enriched ways” (p. 190). Both researchers aimed to support systemic activity changes.

In 2017-2018, at the time of this study, our district was definitely in the middle of
constructing what was not yet there. Core competencies in our district documents were
broadly defined as “a set of abilities central to success in the 21st century” (2017). As K-9
educators worked to understand competencies from their experiential lenses, secondary
educators were preparing to implement the graduation-years of the new curriculum in
2018-2019, as the Ministry’s Student Reporting Guidelines (Government of British
Columbia, 2016) for K-9 were extending into grades 10, 11, and 12. These changes,
occurring at both the local and provincial levels, also signalled paradigm shifts as
educators attempted to discard existing practices that did not align with these changes.

**Exploring expansive learning cycles.**

Expansive learning cycles are organic and iterative. Engeström, Sannino, and
Virkkunen (2014) studied how transformative agency and expansive learning evolved
over time when individuals were motivated to work through resistance and conflict to envision new solutions to difficult problems using multiple perspectives, roles, and instruments. Engeström (2001, 2010) credited Vygotsky, Leont’ev, Il’enkov, Davydov, Bateson, and Bakhtin (see Table 3) for contributing to his theories about the various states of expansive learning stimulated by formative intervention research. Engeström built on others’ theories to describe the different needs participants encounter at various states in the expansive learning cycle of their object-oriented activity.

Table 3

<table>
<thead>
<tr>
<th>Researcher</th>
<th>Contributing Theories</th>
<th>Effects of contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vygotsky (1978, 1997)</td>
<td>Mediated action (tools &amp; signs) Zone of proximal development Double stimulation</td>
<td>Mediated actions are used to help expand learning by problem solving a demanding task using neutral artifacts.</td>
</tr>
<tr>
<td>Leont’ev (1978)</td>
<td>Division of labour in object-oriented collective activity</td>
<td>The separation of individual actions and roles contributes to the object of group activity.</td>
</tr>
<tr>
<td>Il’enkov (1977)</td>
<td>Contradictions as historically evolving tensions</td>
<td>Contradictions are the driving force of transformation.</td>
</tr>
<tr>
<td>Davydov (1988)</td>
<td>Ascending from the abstract to the concrete in learning activity</td>
<td>The initial simple idea or “germ cell” is transformed into a complex object.</td>
</tr>
<tr>
<td>Bateson (1972)</td>
<td>Double bind (existing solutions are problematic)</td>
<td>Joint, cooperative actions solve challenging problems where at first there do not appear to be solutions.</td>
</tr>
<tr>
<td>Bakhtin (1982)</td>
<td>Multi-voicedness or heteroglossia</td>
<td>Conflicting and complementary voices bring new possibilities for solutions</td>
</tr>
</tbody>
</table>

A summary of information presented by Engeström (2010)

Engeström suggested that historically evolving tensions initiated the first state of the expansive learning cycle, which he called the primary contradictions or needs state. As participants question practices and voice their needs for systemic change, they begin to generate concepts in the form of abstract, germ-cell possibilities for solutions. Through inquiry, negotiated roles, and awareness of dynamics, participants can transform conceptual ideals into tools, practices, and advocacy (Coghlan & Shani, 2008).
In their efforts to bring about changes, participants inevitably encounter practical challenges Engeström refers to as the secondary contradictions or double-bind state, where existing models no longer fit and new solutions are not yet apparent (see Figure 5). In formative intervention activities, participants work through this double-bind state, by focusing on the double stimulation of their challenging task and their mediating actions in order to generate new solutions, tools and models.

Figure 5. Aiming Strategic Actions at Contradictions in the Expansive Learning Cycle

As participants implement new solutions or models, the multi-voiced perspectives force them to consider the tertiary contradictions, or resistance state, as communities attempt to work with newly established activities while still dealing with the remnants of previous activities in this state of the expansive learning cycle.

This multiplicity can be understood in terms of historical layers. An activity system always contains sediments of earlier historical layers, as well as buds or shoots of its possible future. These sediments and buds – historically meaningful differences – are found in the different components of the activity system including the physical tools and mental models of the subjects. They are also found in the actions and objects of the activity. (Engeström, 1993, p. 68)
The historical layers of the broader community bring to the change process diverse cultural and historical belief systems, experiences, and backgrounds. By exploring these tertiary complexities, new or adapted solutions may emerge.

At the quaternary state of the expansive learning cycle, participants involved in the activity process reflect on how new concepts might be aligned with neighbouring activity systems and other contexts. These sideways moves can transform or hybridize ideas within an activity system or in interaction with other activity systems, potentially motivating a whole new expansive learning cycle.

Engeström (2001) explained how practitioners and parents developed a patient care protocol in Finland that allowed them to accumulate “experiences to challenge and transform this concept again in new sideways moves” (p. 155). Implementing change is neither linear nor easy. At any state in the expansive learning cycle, sideways moves generated to resolve contradictions may lead to new objects and unforeseen possibilities. Expansive learning is a process of concept formation where “the most important outcome is agency—participants’ ability and will to shape their activity systems” (Engeström, 2010, p. 85). My challenge with using activity theory as a theoretical foundation for expansive learning was to capture and document participants’ moments of making sense of the concept of competencies in ways that were relevant to their local contexts and broader societal needs.

**Summarizing Activity Theory and Expansive Learning**

In this chapter, I described how activity theory and expansive learning form the theoretical frameworks of this study. Formative intervention research models like *Change Laboratory and Developmental Work Research* (Engeström, 2010, 2015; Engeström &
Kerosuo, 2007; Engeström et al., 2014) and Learning In and for Agency Work (Daniels, 2004; Edwards & Daniels, 2012) helped to bridge the relationships between the collective creativity and transformative agency of individuals co-creating mediating instruments to work toward the object of making positive and enduring changes to their activity system.

In my research context, shaped by local communities’ values, rules, and roles, educational leaders are working together to generate new ideas, solutions, learning directions, and cultural artifacts that would not have been possible had each person worked alone (Engeström, 2001).

Formative intervention is not about creating a static protocol or checklist. The moment a tool is created, those using it begin to shape how it is interpreted. So, while I initially used Engeström’s expansive learning framework (see Figure 5) to design and refine my research questions, as I proceeded I realized the pertinence of these contradiction states for exploring how educational leaders in our district were acting: building understandings of competencies, designing supports, sharing with the local community, and adapting practices for multiple contexts. In this study, Engeström’s second and third generation activity theory and expansive learning frameworks serve as my foundations for a formative intervention study of expansive learning. To comprehend the underlying dynamics between individuals, collectives, and systems, in Chapter 4, I describe some of the more significant cultural, political, and historical influences shaping BC’s redesigned curriculum initiative.
Chapter 4 A Context of BC’s Competencies Curriculum

BC’s local and provincial educational reform is embedded in and influenced by other global and national environments. While curriculum policies are created at the provincial level in Canada, they are implemented at local district and school levels. Miettinen (2013) suggested that “there is an interplay between the local organizational actions and macrostructures of the society” (p. 112). Educational practices focused on improving learning are influenced by local, provincial, national, and global power dynamics. Figure 6 is a graphic representation of the context of BC’s competencies curriculum change, including some of the influences that may be shaping local educational leaders’ efforts to bring about district-level changes.

Figure 6. Some of the Contexts Influencing Interpretations of Competencies

In this chapter, I briefly describe some of the historical, cultural, and political influences on the local district context. I begin with the global and national context of competencies in education, before moving on to describe the provincial context of BC’s curriculum changes, and then conclude with the local context for implementing these changes. In this study, my interest was in how local educational leaders co-constructed their
understandings of competencies through curriculum implementation in our school district. While this study cannot be generalized to reflect another district’s experience, the situated context is likely to be familiar to other school districts in BC.

A National and Global Context of Competencies in Education

British Columbia’s focus on competencies in redesigning its curriculum was not isolated or unique. Competencies had become a central concept in curricular reforms in several provincial and international jurisdictions (Alberta Education, 2016; OECD, 2018; Sinnema & Aitken, 2013).

In Canada, Quebec was the first province to focus on competencies in its curriculum reform, known as the Quebec Education Program (QEP) (Inchauspé, 1997; Les réformes curriculaires regards croisés, 2004; Ministère de l'Éducation du Québec, 2001; Younk, 2003). Emerging out of the Estates General (a forum equivalent to BC’s Royal Commission on Learning), the QEP claimed its inclusion of competencies was driven by a cultural need to define Quebec society in contrast to its Canadian and North American backdrop and its European heritage.

Beginning its curriculum reform process, BC turned to Alberta Education’s more recent Framework for Student Learning: Competencies for Engaged Thinkers and Ethical Citizens with an Entrepreneurial Spirit (2010), which juxtaposed ethics, citizenship, and entrepreneurship and defined competencies as “critical for equipping students with the knowledge, skills and attitudes that they will need to successfully navigate their personal journeys in learning, living and working” (Alberta Education, 2016, p. 1). Alberta Education listed its core competencies as: critical thinking, problem solving, managing information, creativity and innovation, communication, collaboration, cultural and global
citizenship, and personal growth and well-being (p.1). Like Alberta, BC’s focus on competencies appears to have been underpinned by an economic and technological imperative to improve young people’s digital literacy skills for employment in knowledge management industries and innovative labour markets (BC Ministry of Education, 2012a, 2015a; Sullivan, 1988).

The curriculum changes in BC, Alberta, and Quebec were also inspired by broader global, economic, political, and educational policy discourses occurring through the United Nations Educational, Scientific, and Cultural Organization (UNESCO) (Delors, 1996b) and the Organization for Economic Co-operation and Development (OECD) (Istance & Kools, 2013; OECD, 2014). The competencies discourse described in Chapter 2 was in response to increasingly complex demands to expand the vision for education beyond an accumulation of knowledge and skills. The OECD’s (2005) Definition and Selection of Competencies known as the DeSeCo Project and the OECD’s Programme for International Student Assessment (PISA) launched in 1997 both promoted the idea that countries could learn from each other about successes in their education systems, while recognizing that the criteria defining success were culturally and contextually determined. In the DeSeCo Project (OECD, 2005), the authors noted,

Key competencies are not determined by arbitrary decisions about what personal qualities and cognitive skills are desirable, but by careful consideration of the psychosocial prerequisites for a successful life and a well-functioning society. What demands does today’s society place on its citizens? The answer needs to be rooted in a coherent concept of what constitutes key competencies. (p. 6)

In an attempt to examine the questions about what demands today’s society places on its citizens, PISA assessments shifted to focus on interactive, collaborative problem-solving activities, including survey questions asking students about their learning environment
and their attitudes toward learning. PISA, working under the OECD (2018), also expanded its focus to include **global competence**.

Global competence is a multidimensional capacity. Globally competent individuals can examine local, global and intercultural issues, understand and appreciate different perspectives and world views, interact successfully and respectfully with others, and take responsible action toward sustainability and collective well-being. (p. 4)

The OECD’s recent inclusion of global competence in PISA is another example of a broader societal aim emerging from the OECD’s research. Many educational jurisdictions are simultaneously attempting to define the skills, knowledge, attitudes, and abilities 21st century learners need within the rapidly changing cultural, political, technological, and economic context of an increasingly global workforce.

Chalkiadaki (2018) referred to how “massive growth” in knowledge generation, management industry, and information communication technologies (ICT) is “changing the conditions for policy-makers and educators and challenging concepts that are taken for granted, such as knowledge, information and ability” (p. 2). He described how the contemporary global debates about the aims of education, in addition to considering 21st century technology, also focused on: “economic well-being and stability,” “human and social development in multicultural, heterogeneous societies,” and “constructing a culture of peace and tolerance in a world of constant political, social, geographical, economic and conceptual changes and conflicts” (pp. 2-3). In attempting to compile a list of 21st century skills and competencies in research literature between 2000 and 2018, Chalkiadaki noted creativity, innovation, problem solving, and self-management as prominent personal skills, while communication, conflict management, open-mindedness, global and cultural awareness, and leadership were important social skills. Addressed
separately and often associated with digital literacy were: knowledge and information management, self-reflection, independent learning, and meta-cognition competencies.

As provinces and nations attempt to identify their aims for education, their varied contexts influence how they define competencies. What is consistent across jurisdictions is that personalized learning is seen as a life-long journey. With this in mind, educators needed to incorporate learner-focused reflections on core competencies beyond subject area learning into their planning and assessment practices. Woven into this challenge is a responsibility to advocate for the inclusion of all learners, opening pathway options, and valuing their varied contributions to society.

**Provincial Context of BC’s Redesigned Curriculum**

The historical development of the competencies discourse, discussed in detail in Chapter 2, illustrated some of the global influences shaping BC’s curriculum changes. The new curriculum—with its focus on developing students’ core competencies through knowing content, actively doing curricular competencies, and demonstrating understanding of big ideas—was an intentional shift to increase student engagement and options for future employment.

There was a strong historical foundation for this, as the *Royal Commission on Reform in Education* (Sullivan, 1988) recommended changes to how students in British Columbia reflect on their learning. When the *Royal Commission* committee published their findings, they emphasized they had tried to define a better educational future “marked by opportunities for greater choice, access, flexibility, cooperation, and responsibility – a future that we hope is both achievable and fair” (p. 71). Individuals and groups from many contexts continue to shape this public vision, defining education in
British Columbia. Following this report, the Social Credit government charged a task
force with interpreting and operationalizing the Royal Commission’s recommendations.

Two years later, this task force published the *Year 2000: A Framework for
Learning* (BC Ministry of Education, 1990). In 1996, the mission statement of this
framework (p. ii) was inserted as the revised preamble to the BC School Act:

AND WHEREAS the purpose of the British Columbia school system is to enable
all learners to become literate, to develop their individual potential and to acquire
the knowledge, skills and attitudes needed to contribute to a healthy, democratic
and pluralistic society and a prosperous and sustainable economy…(Government
of British Columbia, 2014).

This mission statement emphasized the aim of education in BC to develop learners’
individual potential and their ability to contribute to society and the economy. While
there was an emphasis on a “healthy, democratic and pluralistic society,” there was no
direct reference to critical and creative thinking, personal and cultural identity,
sustainable environments, or Aboriginal worldviews. Harker (1992) highlighted the
tensions reflected both in the Royal Commission’s findings and in the *Year 2000* during
Bill Vander Zalm’s time as Premier of a Social Credit government: “Despite frequent
mention of the need for schools to develop students’ individuality through the
encouragement of their critical thinking, creativity, and flexibility, the development of
this individuality is constantly subordinated to the need to maintain social stability and
economic prosperity” (p. 4). His descriptions of these tensions echoed educators’
frustrations with attempting to meet the individual needs of all learners in an environment
where standardized expectations and prescribed learning outcomes were the norm until
2016. Harker also noted the *Year 2000* framework called for learners’ progress “to be
monitored through a comprehensive and pervasive program of assessment” (p. 7).
Using the Year 2000 framework, the Ministry of Education under the NDP government (1991-2001) had a decade to bring educators together in teams to define the K-12 scope and sequence of each subject area. Between 1995 and 2001, a series of curriculum binders, known collectively as BC’s Integrated Resource Packages or IRPs (BC Ministry of Education, 1995) began arriving in schools across the province, starting with English Language Arts, then Mathematics, and so on, until the expectations for each subject area had been explicitly detailed and supplemented with examples and resources. Educators were encouraged to integrate the learning outcomes with students’ experiences and other subject areas but the IRP binders failed to provide support for cross-curricular exploration (Case, 1994). While attempting to ensure students attained approximately 400 prescribed learning outcomes at each grade level, educators had little time or energy to focus on encouraging students to go deeper with their learning.

BC’s public school educators felt additional pressures and frustrations as class size and composition language was stripped from their negotiated contracts when the BC Liberals followed through on their election platform, A New Era for British Columbia: A Vision for Hope and Prosperity (BC Liberals, 2001). In 2002, the Liberal government also brought in structural reforms through Bill 34 that focused on:

- **choice** (per student block funding allowing students to take courses in multiple locations);
- **accountability** (in 2003 the Fraser Institute began publishing district and school performance data based on the Ministry’s Foundation Skills Assessments); and
- **access** (increasing on-line, open-learning and independent school options).

Bill 34 added to teachers’ concerns that public schooling in BC was being subjected to market-funding models (Fallon & Poole, 2013). Block funding at elementary schools had significant potential to change how schools operated. A student could take classes in
more than one school and the Ministry funding for that student would be divided among the schools. This example seemed to suggest BC’s original focus on competencies was driven by a market vision of stackable credentials, an empiricist focus on accountability, and a technology-driven focus on digital literacy.

With more students in classrooms being identified with unique needs, and with the expectation that teachers would be accountable for meeting the diverse needs of all students, teachers were feeling increasing tensions over the responsibilities being downloaded to schools from the Ministry and from districts. Between 2002 and 2016, the BCTF was involved in a dispute over the stripping of contract language and the resulting crowded classrooms and school closures made for a frustrated work force.

Given the Liberal government’s acrimonious relationships with the BC Teachers’ Federation (BCTF) (Fleming, 2011), Premier Gordon Campbell invited his Premier’s Technology Council (PTC), comprised of influential business partners, to develop the vision for BC’s educational reform. The PTC then invited a cross-section of representatives in education to join this council in crafting the framework document, *The Premier's Technology Council - A Vision for Education in the 21st Century* (Government of British Columbia, 2010).

Since the framework of the *BC Education Plan* was first introduced in 2012, diverse groups, like the BC Teachers’ Federation (BCTF), the Federation of Independent Schools (FISA), the First Nations Education Steering Committee (FNESC), and partners from local school districts, advocated for fundamental changes. These individuals and groups played an important role and, as a result, some of the proposed changes—like weaving in Aboriginal understandings—were added to the Premier’s Technology Council
vision for education in this province. Personal and social identity, awareness, and responsibility were added and communication competencies were expanded to reflect relational and interactive intentions of communication, rather than simply technical aspects of language, symbols, and digital literacy. Public engagement and input into redesigning the curriculum shifted the original framework in significant ways, by including Aboriginal understandings and environmental considerations, for example.

At the time of this study, public school educators in BC were working under a long-term contract and the Supreme Court had ruled in favour of the BC Teachers’ Federation (October 2016) with regard to the stripping of contract language in 2002. The Truth and Reconciliation Commission recommendations were represented in BC’s redesigned curriculum emphasis on developing Aboriginal understandings. There was a sense that the BC Education Plan (2012a) framework and the online redesigned curriculum known as Building Student Success (BC Ministry of Education, 2016a) were documents open to changes and inputs from educators and the public in order to consider diversity and inclusion as priorities.

Partners in the Ministry of Education seemed comfortable with having local districts define, shape, and experiment with the implementation of the BC Education Plan and the new student reporting measures. After nearly two decades of assessing “prescribed learning outcomes,” many teachers in BC were cautiously optimistic about the changes. In the redesigned curriculum, the prescribed learning outcomes were reframed as “content area learning standards” (what students were expected to know) and “curricular competencies” (what students were expected to be able to do). Some teachers questioned whether this was simply a manipulation of terms. However, as educators
engaged with the redesigned curriculum, *Building Student Success* (BC Ministry of Education, 2018a), there was a willingness to explore how to integrate this new policy into local contexts. This shift to a more openly negotiated process was a challenge many educators seemed ready to accept.

The *BC Education Plan* (2012a) reiterated the ideals of the *Royal Commission on Education in BC* (Sullivan, 1988). It also attempted to address educators’ frustrations with the shortcomings of the *Year 2000 Framework* (1990) and the *Integrated Resource Packages - IRPs* (1995). The *BC Education Plan* framework, followed by the new curriculum *Building Student Success*, focused on learner engagement:

> To maintain high achievement, British Columbia must transform its education system to one that better engages students in their own learning and fosters the skills and competencies students will need to succeed. One focus for this transformation is a curriculum that enables and supports increasingly personalized learning, through quality teaching and learning, flexibility and choice, and high standards. (BC Ministry of Education, 2018c)

*Building Student Success* (2012a, 2015a) stated that *all* learners could be successful contributors to a prosperous and sustainable society. At the time of this study, the Teacher Regulation Branch and the BC Teachers’ Council (2013) were consulting with partner groups to revise professional standards that would reflect ongoing professional development instead of the present competence/incompetence model (Teacher Regulation Branch, 2017). In this study, as I explored connections with the new curriculum and with competencies, I could see how personalized learning, contributions to society, and the ongoing development of core competencies were also becoming part of the discourse around educators’ professional learning and teaching standards.
A Local Context for Examining Practices in Relation to Competencies

Nanaimo Ladysmith Public Schools, the district in this study, is mid-sized with 29 elementary (K-7) and six secondary schools (8-12). This district is both urban and rural in nature, a characteristic that appeals to families with school-aged children and to the elderly because it is neither a remote, isolated area nor a sprawling metropolis. In 2017, this district was comprised of nearly 2000 employees working with approximately 15 000 students in Kindergarten through Grade 12. Nearly 11% of the K-12 students were in French immersion (16% in the K-7 grades), 5% of students accessed English Second Language supports, 7% of students had a special education designation, and 15% of students identified as being of Aboriginal ancestry (BC Ministry of Education, 2016b).

Like other districts across the province, employee groups in this district have been through periods of labour unrest over working conditions, fluctuating student enrolment, school closures, budgetary compressions, and employment uncertainty. In 2017-2018, in response to the court ruling on class size legislation, the district needed to bring in over 40 portables and had to fill over 150 teaching positions for these new classrooms. Principals worked closely with district staff to provide remedy measures for any class not meeting the class-size and composition legislation. These significant changes in staffing and school organization, along with the new curriculum and new reporting measures, provided ample stimulus for change. At times, these changes seemed stressful and overwhelming; at others, they were exciting and energizing.

Over the course of this study (2016-2018), the district had embedded mechanisms to support professional learning in the areas of inclusion, curriculum, assessment, and collaboration. At the school level, the district funded one hour per week within the school
day for Professional Learning Communities (PLCs). In 2017-2018, each school also had a half-day per week to allocate support for professional Inquiry and Innovation (I&I) learning initiatives. At the district level, a full-time learning coordinator and three part-time assessment coordinators supported district inquiry and assessment initiatives under the guidance of two Directors of Instruction (elementary and secondary) leading the Department of Learning Services. A small group of vice-principals and principals led professional inquiry at administrator gatherings while *Natsumat Tatulut*, a Coast Salish term meaning “learning together,” united a team of teachers, principals, coordinators, and the Directors of Instruction to collaboratively plan professional learning events for all district employees working with students (education assistants, teachers, principals and vice-principals). The district’s pride in its collaborative learning models was reflected in this quote on the district website: “The district has become the exemplary model for the province through the use of its curriculum implementation days. The first was held on January 29, 2016 with a second held on May 16, 2016” (NLPS, 2016).

At the first district-wide curriculum implementation day, a group of 60 educators volunteered to lead the initial explorations of the new curriculum with their colleagues (January 29, 2016). At the second implementation session (May 16, 2016), educators from across the district formed their own inquiry groups. These collaborative learning implementation initiatives were a welcome shift away from top-down curriculum implementation, as they opened possibilities for teachers, coordinators, and administrators to “take advantage of the messiness of the educational policy system rather than cleaning it up, [so that] constructive, creative approaches might be developed locally” (Firestone, 1989, p. 23). Buoyed by the successes of these early sessions and the
work of other district committees made up of all employee groups on literacy, inclusion, assessment, and primary (K-3) education initiatives, after 2015-2016, there was a creative energy resonating in our school district that was not as evident before.

This creativity was also evident in other districts as they shared their reporting models and efforts to focus on competencies using successful learner traits and Aboriginal understandings. Though our district lagged behind others in September 2016 when it came to experimenting with new reporting formats, it had the advantage of examining other districts’ formats before deciding to go with grade-less reporting from K through 9. In making this decision, our district became the only district in the province extending grade-less reporting into the secondary grades. Therefore, each district began by focusing on what was most important to them and then shared their new instruments with other districts, leading to boundary-crossing innovations.

Similar to educators in other jurisdictions, many teachers in our district were participating in inquiry-based research projects using Kaser and Halbert’s (2013) *Spirals of Inquiry* model, as well as other intentional collaborative inquiry models (Earl & Timperley, 2009; Katz & Dack, 2013; Katz & Earl, 2010; Timperley, 2008). Some schools were examining research evidence for positive impacts of teacher feedback on student learning (Hattie & Timperley, 2007). Though many educators admitted feeling overwhelmed with the new aspects of the curriculum and the student reporting practices, educators were gradually introduced to the new curriculum and the new reporting focus on competencies through participation in professional learning committees in schools and district gatherings like the Inquiry and Innovation (I&I) meetings for school-based I&I teachers.
Summarizing a BC Context for Competencies as Curriculum Change

In BC, many local and provincial groups were approaching different aspects of the redesigned curriculum and its focus on competencies from their areas of expertise. As a result, local districts and special interest groups focused on core competencies from a variety of angles, seeking to improve: Aboriginal understandings, diversity and inclusion, environmental perspectives, and assessment of competencies beyond the traditional one-dimensional performance grades. Global and national education organizations like the OECD and curriculum documents from other provincial jurisdictions also helped shape local and provincial initiatives.

These interconnected contexts added an important foundation for understanding how dynamic systems in activity theory are influenced by multiple groups interacting to bring about transformative changes. The object of each group’s activity is shaped by the subject’s relationships with the rules, divisions of labour, and the cultures and beliefs of their varied communities. Groups interact within the context of these historically evolving tensions while using instruments to mediate the contradictions in order to bring about transformative changes. For example, BC educators were accustomed to the Ministry playing a prescriptive role in curriculum, which was disrupted by the more open approach offered by competency curriculum reforms. The discussion in this chapter is, therefore, an important foundation for understanding the context of educators’ efforts to co-construct their understandings of competencies in the chapters that follow.

In Chapter 5, I describe my formative intervention research methodology for exploring how participants in this study described their activities in relation to the expansive learning for educational change.
Chapter 5 Formative Intervention Research Design

This chapter builds on Engeström’s (2001) theoretical frameworks for activity theory and expansive learning, and on formative intervention research (FIR) methodology as described in Chapter 3. I begin by clarifying my position as a researcher-participant before introducing the other participants of the working group. I then outline the research aim, questions, and design guiding this study, followed by the data collection process in the working group sessions and the methods to analyze and represent the data from these sessions. I conclude with a reflection on the trustworthiness, transparency, and reflexivity of my research efforts throughout this study. Formative intervention research was particularly appropriate for this study as the research design provides opportunities to stimulate conversations around challenging contexts or problems with the aim of having participants collaboratively create and implement solutions beyond those they might have imagined had they worked in isolation.

Researcher-Participant Position in Formative Intervention

As I am both a researcher and a participant seeking to better understand and to improve educational practices, formative intervention research was an opportunity to share my understandings based on my experiences while learning from the experiences of others. As a practitioner, I have 35 years of experience as an educator in K-12 education, with 12 of those years as either a vice-principal or principal in four elementary schools. I am intrigued by the possibilities created by the shift to competencies in BC’s new curriculum and, at the same time, I am wary of the range of definitions that can be taken up and applied. My interests are in ensuring that educators in my district have opportunities to build on a holistic, expansive, and collective view of competencies,
rather than an additive or reductionist focus on the acquisition of skills and behaviours. My perspective is informed by and builds upon the work I have been doing in relation to both leading and participating in professional learning opportunities.

At the time of this study, I was a participant in Professional Learning Communities (PLCs) at my school, with my school district, and with my professional association. In our recent collaborative work, there has been considerable focus on improving educational practices. My research into activity theory and expansive learning and my belief that meaning-making is a mediated and socially constructed activity informed my choice of formative intervention research methodology. With my ongoing efforts to integrate curriculum in meaningful ways with students’ real-world experiences, I was interested in exploring a more expansive view of competencies with other educational leaders. My goal was to help equip us all to support students and colleagues, while avoiding a reductionist approach to the core competencies of the new BC curriculum. I recognize that my research motives differ in scope, depth, and intensity from those of my colleagues participating in this research.

I chose to focus primarily on understanding how core competencies were shaping practices because the Ministry’s Student Reporting Guidelines specifically referred to student voice in relation to core competencies. Curricular competencies did not generate the same level of questioning, except when participants attempted to make distinctions between core and curricular competencies (see definitions on page 1).

In this chapter, I elaborate on my shift from my role as a participant in this formative intervention study to my role as a researcher. As the researcher designing and conducting this study, I also had a responsibility to ensure the research process was
trustworthy, transparent, and reflexive, and that I had considered the ethical implications of this study. A discussion of these aspects is presented at the end of this chapter.

**Research Participants Involved in this Working Group**

In this section, I introduce the participants of this formative intervention research and describe the recruitment and selection criteria used in this study. The term “participants” refers specifically to the 12 educational leaders involved. As I was also a participant in this working group, I include myself as the 13th member of the group and frequently describe our collective work with the terms “we” and “our.” All 13 participants were actively involved both in teaching students and supporting colleagues in a variety of leadership roles. Participants were supporting colleagues and parents with assessment and reporting practices, with French Immersion, with Aboriginal understandings, and with inquiry projects in their professional learning communities.

Table 4 provides an overview of the distribution and number of participants in different roles, levels, and areas of expertise.

Table 4

<table>
<thead>
<tr>
<th>Participants’ Roles, Grades, and Areas of Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles</td>
</tr>
<tr>
<td>Teachers (All 13 participants)</td>
</tr>
<tr>
<td>Vice- Principals (3)</td>
</tr>
<tr>
<td>Principals (3)</td>
</tr>
<tr>
<td>District Coordinators (5)</td>
</tr>
<tr>
<td>Teaching/Supporting Grades*</td>
</tr>
<tr>
<td>Primary (4)</td>
</tr>
<tr>
<td>Intermediate (5)</td>
</tr>
<tr>
<td>Secondary (4)</td>
</tr>
<tr>
<td>Areas of Focus</td>
</tr>
<tr>
<td>French Immersion (2)</td>
</tr>
<tr>
<td>Aboriginal Education (3)</td>
</tr>
<tr>
<td>Assessment (4)</td>
</tr>
<tr>
<td>Inquiry-PLC (7)</td>
</tr>
<tr>
<td>*Main area of support</td>
</tr>
</tbody>
</table>

Participants’ worked in schools from across the district—north (4), central (6) and south (3). It was interesting to note that between April and November 2017 (the duration of this study), 6 of the 13 participants changed roles, schools or grade level focus areas.

The term “educators” refers collectively to teachers, principals, vice-principals, and coordinators with whom participants were interacting as they carried out their district
roles; however, these “educators” were not participants in this study. There are certainly power differences in these roles; however, acknowledging our district’s efforts to work collaboratively across roles, I refer to “educators” except where the individual’s position is key to understanding differences based on roles and responsibilities.

Recruitment and selection criteria.

Upon receipt of approval for this study, with input from the Director of Instruction and from District Coordinators, I used purposeful sampling (Brewerton & Millward, 2009) to identify a number of educators actively supporting colleagues in their schools with inquiry, assessment, and reporting elements of the redesigned curriculum. Patton (in Morse, 1994) suggested that “the logic and power behind purposeful selection of informants is that the sample should be information rich” (p. 229). My primary selection criteria for participants were that they were educators with a wide range of experiences, that they represented the diversity of our school communities, and that they were actively working with students. I did not consider leadership styles in my selection criteria as my research focus was on how participants co-constructed their understandings of competencies as a stimulus for changes in their focus areas at both school and district levels (assessment, inquiry, French immersion, and Aboriginal understandings).

As this was a study of district systemic practices, I had invited a district administrator to be a member of this study. This individual initially accepted but was concerned that a recent role change might influence how freely others felt they could contribute within the group. The research participants accepted this rationale and agreed to have this individual receive the session summaries but not participate directly. In this
way, I was able to keep the district informed of the process and stay with my selection criteria for participants.

In April 2017, I sent an invitation letter (see Appendix C) and consent form (see Appendix D) to educators who had indicated an interest in participating or who had been recommended by the District. I was surprised when each of the 12 individuals contacted accepted my invitation. As I had worked purposefully with the district coordinators to invite participants who represented a range of district dynamics, and since these participants accepted my invitation, I did not need to look for additional participants. With so many participants, I was a bit concerned it would be challenging to share multiple perspectives. However, this was not the case. Later, the extra participant numbers became an advantage because scheduling conflicts and unpredictable events prevented participants from attending all the sessions.

Diversity within the working group was important to ensure a variety of school-based contexts and experiences were represented. For example, even though the curriculum and assessment reforms were not yet compulsory at the Grade 10-12 levels, they were present in Grades 8 and 9. I considered the pilot stages of the secondary experience important for this study and was relieved to have three participants from the secondary level and others who had previously worked in secondary schools. Several participants could speak directly to the curriculum focus on Aboriginal understandings, another important aspect of our work.

The geographical location of the schools also reflect the diversity of communities in our district. North-end schools tend to be in newer subdivisions, central schools tend to be older with a mix of settled and shifting communities, and south-end schools represent
a mix of rural, newer, and older communities. The three First Nations communities—Snaw-naw-as, Snuneymuxw, and Stz’uminus—were also represented by these three geographical areas. School size, grades, diversity of populations (Aboriginal, students accessing English Second Language supports, French immersion, elementary and secondary, and socio-economic diversity) and diversity of roles (teacher, vice-principal, principal, and district learning coordinator) also brought participants’ diversity into this study. Additional criteria in this purposeful sampling included considerations of gender, role, and years of experience.

In terms of exclusion criteria, I did not include support staff and students, as these groups were not responsible for implementing the curriculum or for reporting on student progress. Individuals opposed to curriculum change were not directly represented given they had not applied or volunteered for leadership roles. Instead, I encouraged participants to bring forward tensions and criticisms they were hearing from school colleagues. This was not difficult as participants were eager to share challenging scenarios. In our first working group session, one participant opened our discussion by asking permission to describe a problematic situation. The focus questions also invited participants to consider contradicting perspectives from individuals in schools.

**Coordinating sessions for meaningful participation.**

My original intent was to conduct six 90-minute working group sessions over a period of three months. At the first session, participants indicated their preference to extend the research over a longer period; as a result, the first three sessions were held in May and June and the other three in September, October, and November of 2017. To accommodate conflicting schedules and to include as many participants as possible in the
data collection process, I conducted Sessions 2, 3, and 4 on two separate dates so participants could attend one of the two dates. As a result, the data collected for this study consisted of recordings and transcripts from a total of nine working group sessions, each approximately 90-minutes in length (see Table 5).

Table 5

*Working Group Participation in this Study*

<table>
<thead>
<tr>
<th></th>
<th>Session 1</th>
<th>Session 2 (a &amp; b)</th>
<th>Session 3 (a &amp; b)</th>
<th>Session 4 (a &amp; b)</th>
<th>Session 5</th>
<th>Session 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirming</td>
<td>12</td>
<td>9</td>
<td>3</td>
<td>6</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Attending</td>
<td>10</td>
<td>9</td>
<td>2</td>
<td>6</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

There was some attrition between June and September, when two participants indicated they were unable to continue because of the intense workload of their new assignments and one member was on leave from the district.

All sessions were well attended with the exception of Session 4, where the September start-up was unusually busy because changes in class size legislation necessitated the hiring of 150 new teachers and class reorganizations. So, even though participants had confirmed their attendance for Session 4, only two people were able to attend each of the proposed dates for this session. This created an opportunity for targeted conversations that went deeper into individual challenges and perspectives. For the final session, a rescheduled district meeting prevented some from attending and one participant had a school reporting deadline. I communicated with the absent participants by email.

Juggling role expectations between schools, communities, and family affected participation but by over-recruiting, the size of the research working group sessions was sometimes reduced without losing the input of the other members. In this way, I was able
to mitigate factors out of my control like workload, rescheduled school and district meeting dates, and participants’ role changes between June and September.

**Participants’ motives and working group challenges.**

Formative intervention research methods for improving practice rely on participants having strong common motives for the research activity, given that they have to be willing to work through the contradictions emerging from the challenges. The collective activity of the working group was both formative (informing individual and group practices) and interventionist (seeking improvements to school and district practices). Naomi represents a sentiment I heard among other participants about their reasons for participating in the study.

The core competencies and cross-curricular content competencies were the focus of my collaborative work with staff in my I&I [Innovation and Inquiry] role and for our NOII [Network of Inquiry and Innovation] inquiry… It is my hope that participation in your project will help me to work more meaningfully with my staff when I return in the coming year.

(Naomi, personal communication, May 27, 2017)

As Naomi’s quote highlights, participants in this working group hoped to co-construct an understanding of competencies that had the potential to inform systemic practices in their work with district educators and students, families, and other community partners.

Participants faced challenges deciding what information and experiences to share between the working group and their school communities. For example, it was important to respect confidentiality when referring to school contexts and sharing samples of student work, just as it was important to respect the confidentiality of comments shared in the working group. These participants were also dealing with changes beyond their control, with respect to workload demands and keeping pace with the changes in Ministry and District policies at this interim stage of implementation.
Connecting Research Aim, Research Questions, and Research Design

My research aim was to examine how a small working group of educational leaders (teachers, district coordinators, principals, and vice-principals) co-constructed their understandings of competencies to inform their work with colleagues on curriculum and reporting changes in our district. This working group was my unit of analysis. Even though participants had different aims and understandings of competencies, each participant was committed to the goal of expanding the group’s collective understanding of competencies in order to support their learning communities across the district.

This formative intervention research consisted of six phases: 1) the preliminary phase; 2) the research design phase; 3) the data collection phase; 4) the initial data sorting and coding phase; 5) the in-depth data analysis; and 6) the representation phase. I have addressed the preliminary phase in previous chapters by describing the foundations of activity theory, expansive learning, the evolution of competencies, and the changes in BC’s education system. I describe the other phases in the subsequent sections.

The Research Design Phase

I began the design phase by drawing on parts of Engeström’s (2001) expansive learning framework to test the potential of my research questions. Observing colleagues’ responses to the competencies focus of the new curriculum (see Table 6), I could see the significance of my questions and Engeström’s framework.

I then adapted Daniels’ (2008a) change lab layout (see Figure 7) to describe the research methods used in this study. I designed the initial conceptual idea for the study and selected some of the mediating instruments. Participants provided the vision and examples of disturbances and change in their communities that I then referred to as
mires in subsequent sessions. In my researcher role, it was my responsibility to bring forward key concepts emerging from participants’ examples, student work samples, experiences, and documents they shared. These key concepts were essentially the formative intervention tools or mirrors I relied on to stimulate discussions, which then prompted participants to consider additional mediating instruments for their work with colleagues. My analysis of this process was done in relation to the frameworks of activity theory and expansive learning.

Table 6

*Observations of Competencies in our Local Context*

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Early observations of local educators interacting with the competencies focus of the new curriculum</th>
</tr>
</thead>
</table>
| How are educational leaders co-constructing their understandings of competencies as learning? | *Primary Contradiction or Needs State*  
At the first two curriculum implementation days, educators reviewed and discussed the curriculum changes in the *BC Education Plan*, particularly the new competencies terminology. They explored connections between their current practices and the competencies focus for improving learning. |
| What tools are educational leaders accessing and creating to support their colleagues in co-constructing understandings of competencies? | *Secondary Contradictions or Double-Bind State*  
The depth of curriculum change became more apparent when the Ministry Reporting Order mandated inclusion of student voice when reporting on core competencies. Districts needed to develop new reporting models to be able to report on competencies. |
| How are educational leaders working with contradictions and resistance from local learning communities in co-constructing understandings of competencies? | *Tertiary Contradictions or Resistance State*  
Tensions were beginning to emerge in school communities as educators struggled with how to focus on both core and curricular competencies and engage in ongoing communication of learning with parents. Parents were having difficulty understanding the new reporting formats and graduation years. Teachers were questioning which assessment and reporting models would ensure students transition to post-secondary. |
| How do educational leaders perceive the focus on competencies to be shifting teaching, learning, and assessment practices in their local school district? | *Quaternary Contradictions or Reflection-Realignment State*  
As communities began to implement curriculum changes, especially at the secondary grades and considering graduation requirements, new considerations and new contradictions were emerging. |
In the design phase, my initial observations from Table 6 and the formative intervention research design model from Figure 7 influenced my research proposal and consent process with the school district. I shared my proposal with the Director of Instruction in June 2016. Then, because the Ministry released its draft Student Reporting Guidelines in August 2016 and this document was significant to my research, I included this new stimulus, sharing my revised proposal with the District Superintendent, the Director of Learning Services, and the District Learning Coordinators (see Appendix A). I then presented my revised proposal it to the research participants at our first working session in May 2017.

**The data collection phase.**

I describe the data collection phase in terms of design elements and formative intervention tools (see Table 7). During the data collection phase, I changed my plan for six working group sessions to nine in order to allow for greater participation, as presented in the first column of the table. Each session was approximately 90 minutes long and took place monthly in the library at my school, with the exception of the final reflection and
celebration session, which took place in my home. To collect the data from these sessions, I used two audio recorders. I preferred these because, unlike video recorders, participants tended to forget the audio recorders were there. Even though the participants knew they could pause the recording at any time, they never did. It was easier for me to recall the discussions while they were fresh, so I transcribed the recordings within two weeks of each session.

Table 7

Research Phases, Design Elements, and Formative Intervention Tools

<table>
<thead>
<tr>
<th>Research Phases</th>
<th>Design Elements</th>
<th>Formative Intervention Tools in Working Group Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary Phase:</td>
<td>General Research Models</td>
<td>• Activity Theory &amp; Expansive Learning (see Chapter 3)</td>
</tr>
<tr>
<td>Theoretical framework and historical contexts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Design Phase:</td>
<td>Working Group (Researcher and Participants)</td>
<td>• Proposal and consent forms (see Appendices A, B, C, D)</td>
</tr>
<tr>
<td>Proposal and Consent Stage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Setting the tone for interactions, dynamics, trust &amp; critique</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Collection Phase:</td>
<td>Vision (Participants’ aims)</td>
<td>• Audio recordings</td>
</tr>
<tr>
<td>Working Group Sessions</td>
<td>Mediating Instruments</td>
<td>• Coded transcripts</td>
</tr>
<tr>
<td>- # 1 Questioning needs</td>
<td></td>
<td>• Formative Intervention Questions (see Appendix A, Sessions #1-6)</td>
</tr>
<tr>
<td>- # 2* History and data</td>
<td></td>
<td>• Past, present, future activity theory charts with coded data (see Appendices E, F, G)</td>
</tr>
<tr>
<td>- # 3* New models</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # 4* Community resistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # 5 Realignment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- # 6 Reflection and celebration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Sessions 2, 3, and 4 were done twice, for a total of nine sessions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Data Analysis Phase (as a formative intervention tool for the working group sessions)</td>
<td>Mirrors (examining experiences, documents, student samples, coded data and themes)</td>
<td>• Session summaries and sensitizing concepts (see Appendices F, G, H, I, J)</td>
</tr>
<tr>
<td>Initial data sort in relation to the nodes of the activity theory framework for participants to further explore in sessions 2 – 6.</td>
<td></td>
<td>• Concept summary after session 3 between June and September (see Appendices K, L)</td>
</tr>
<tr>
<td>In-Depth Data Analysis Phase</td>
<td>Reflections on expansive learning experience</td>
<td>• Member checks from participants: feedback on concepts and themes (see Appendices M, N, O)</td>
</tr>
<tr>
<td>Analysis of concepts pointing to identified needs (themes) in the expansive learning cycle.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Representation Phase</td>
<td>Outcomes Dissertation</td>
<td>• Presentations to district and other groups</td>
</tr>
<tr>
<td>Analysis chapters 6-9</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For the first working group session, the research focus was on participants’ understanding of competencies and their visions for learning in relation to the new curriculum. In the second and third sessions, the questions focused on participants’ descriptions of their efforts to support colleagues with shifting from past practices toward a competencies focus, including the new mediating instruments they were designing and implementing to support this shift. The fourth and fifth sessions aimed to explore the resistance and new solutions participants encountered in their schools and in the broader community as they worked through the change process. The final session was an opportunity to reflect on participants’ experiences in this study. For a more detailed outline of the sessions, see Appendix A.

For the initial data analysis, I prepared a brief summary of the transcript, including emerging questions to send to participants prior to each subsequent session (see Appendix E and Appendix F). These summaries and the past, present, and future data charts served as the mirrors for participants to reflect on previous sessions. I describe the initial data analysis and the more in-depth analysis phases in the next two sections.

**The initial data sorting and coding phase.**

In the initial data analysis phase, the nodes of Engeström’s activity theory framework acted as sensitizing concepts to sort and code the data. Patton (2002) defined sensitizing concepts as the “categories that the analyst brings to the data” (p. 456), including concepts that emerge in theory and the relevant literature.

He considered each question in relation to the five central principles of activity theory: 1) the activity system as the unit of analysis, 2) multi-voicedness, 3) historicity, 4) contradictions, and 5) expansive cycles. Prior to conducting my study, I constructed a matrix of my research questions in relation to these principles of activity theory (see Appendix N). Working through this matrix helped me examine my assumptions about my practice based on the stimulus of this unfamiliar research tool. I returned to this matrix to compare my pre-study assumptions with the ideas emerging from each session. Of course, analyzing 14 hours of discussions between 12 participants over 9 sessions and 8 months, was richer and more complex than my initial assumptions. This matrix was a reminder that systemic activity is culturally and historically situated.

As the researcher, it was primarily my responsibility to provide the formative intervention tools for the working group sessions. Immediately after transcribing the recording of each working group session, I examined the data for lines of inquiry to bring to the subsequent working group sessions. Not knowing in advance what those lines of inquiry might be, the nodes of Engeström’s activity theory framework acted as the sensitizing concepts for this initial sort. For this categorization process, I colour-coded participants’ statements according to the six nodes of the framework: “subject” (yellow), “object” (green), “mediating instruments” (blue), “community” (pink), “rules” (orange), and “division of labour” (violet). This initial sort yielded six separate charts of statements potentially pointing to examples of each node (see Appendix G). This initial data analysis phase served to identify key words, phrases, and ideas based on the nodes of the activity theory framework; I then built on these ideas to generate focus questions and summaries for each subsequent working group session.
Once I had completed this initial sort of the data from the first transcript, I realized I needed to situate participants’ statements in relation to the sensitizing concept of historicity. For this part of the content analysis process, I asked participants at the start of the second working group session to review and code the statements from the first session by whether they were referring to historical (H), present (P), or future (F) practices or contexts. Going through this process allowed me to observe how participants reacted to my initial coding of the first session. It also provided participants with an opportunity to become familiar with the nodes of the activity theory framework early on in the process, and to comment on what they were noticing as they read the statements. Participants were able to see how I identified their comments using alphanumeric codes rather than their names. Using the activity theory framework for this colour-coding and chronological sorting process guided the transcript analysis of subsequent sessions, but I did not ask participants to repeat this coding exercise in the subsequent sessions.

For the third and subsequent sessions, I taped the colour-coded excerpts from previous sessions onto three activity theory framework charts: 1) historical, 2) present, and 3) future (see Appendix H). Participants had an opportunity to review these charts at the start of each session. Just by the distribution of the colour-coded excerpts hanging from each node on each of the three charts, participants could see which nodes had been important in each session: stories about rules and structures from the past; existing instruments, division of labour, and community in the present; and the object of our activity as a future-oriented vision. By summarizing and building on the data from each session, participants had multiple opportunities to interact with the data and share connections I might have missed.
This visual coding, sorting, and representing process allowed me to distance the statements from the flow of the working group context and consider each statement in relation to the nodes of the activity theory framework. However, these nodes were interconnected and interdependent. For example, participants described their engagement with the object of their activity while focusing on how their relationships with their learning communities, their roles and the rules provided structure to our school system. Discussions about structures generated ideas for new instruments based on a vision for changing the markers of success. This initial analysis was insufficient for understanding how participants’ co-constructed understandings of competencies evolved and expanded our collective learning. For this, I needed to go deeper into my data analysis by also using the sensitizing concepts of the expansive learning framework to understand the themes emerging from the participants’ words, phrases and ideas.

**The in-depth data analysis phase.**

Following the third working group session, I had time to conduct a more in-depth analysis of the transcripts and my initial coding according to the nodes of the activity theory framework during a three-week summer course focused on researching, writing, and data representation. In order to more easily locate the threads connecting participants’ ideas across the sessions, I refined my initial coding charts where I had sorted participants’ key words, phrases, and ideas according to each node of the activity theory framework. Beside each statement, I noted the transcript session and page number for each entry (for example, 1.5 referred to a key word mentioned in session 1 on page 5 of the transcript). Where possible, I regrouped similar ideas to have fewer categories (see Appendix I). I expanded this chart to show the distribution of coded words, phrases, and
ideas from session to session to be able to search for shifts in the discussions (see Appendix J). In this way, I was able to see continuity from one session to the next, identify interruptions, and notice at what point new words were introduced.

My challenge with this chart was that, by focusing on recurring ideas, I risked missing the unique germ cell ideas that stimulated and transformed our conversations. To uncover these “aha” moments, I returned to my journal notes and listened to each recording again while reading each transcript. As I analyzed the transcripts, I reflected on the ethical contradictions and critical challenges of representing participants’ voices. I often wished I could reproduce the tone of voice, the reflective pauses, and the excitement when a participant broke through a frustration to suddenly see an idea in a different way. Where participants’ depth of conviction collided, these moments seemed to inspire new confidence and stimulate participants to push on. Rich experiences resonating with emotion and passion were easy to identify as potential triggers of change.

Yet, the day-to-day mundane, systemic routines and structures, stretching like warp threads on a loom, were often what supported us while we focused our attention on transformative shifts in instruments, rules, and roles. How could I ensure that my analysis represented these key but slight shifts in tension interwoven with the more obvious ideas participants expressed?

I concluded this phase of my in-depth analysis by preparing a 30-page summary of the sensitizing concepts with exemplars of participants’ statements and the preliminary themes I was noticing. I shared this summary with participants for member checking (see Appendix K). This document gave participants an opportunity to review their input from the May-June sessions in preparation for the September-November sessions. I included
an alpha-numeric index so participants could quickly locate their statements within the document (see Appendix L). By sharing my initial coding, participants had an opportunity to see how their comments were shaping the study. They added their input through email and conversations, and during subsequent sessions. These ongoing researcher-participant feedback loops increased the trustworthiness and reflexive value of my interpretations (see Appendix M). They also provided a summary of potential ideas that participants could explore with colleagues in other contexts. From the transcripts of the September, October, and November working group sessions, I continued to categorize participants’ ideas, words and processes according to the sensitizing concepts, added to these charts (see Appendix J). At the end of the working group sessions, I had between 22 and 68 codes for each node of the activity theory framework, for a total of 223 codes across the six nodes.

While analyzing the data emerging from the sessions, I reflected on how these transcripts depicted participants’ challenges as they co-constructed their understandings of competencies. Participants often referred to their challenges in terms of what they believed was needed to shift practices toward a focus on competencies. I focused on these needs in my interpretation of our working group’s efforts to co-construct understandings of competencies as a change process. The contradiction states of Engeström’s expansive learning cycle and the core competencies focus of this study informed how I organized my analysis of our learning process.

**The representation phase.**

*Gathering inspirational people to share ideas about learning is energizing! Deciding how to analyze and represent their ideas in a meaningful way for the benefit of others, that is challenging! As I reviewed the transcripts, I reflected on my grandmother’s weaving skills. Beste*
prepared the warp threads on her loom, gathered her tools, and selected her wool. My research framework was like the loom with my methodology forming the warp threads. As I examined the data from my transcripts, I could see the coloured yarns coding our conversations, but I agonized over how to weave these rich ideas so others would see how our process had unfolded to shift our practices. Beste patiently wove her tapestry, adjusting as she went. This study was co-constructed, but it was my role to weave the tapestry of our journey so it could inspire others. (Younk, PR)

At the conclusion of each working group session, I interpreted the themes I saw emerging from participants’ contributions in relation to the sensitizing concepts of the theoretical frameworks and their efforts to co-construct their understanding of competencies. I structured my analysis so as to help readers outside of this process understand each state of the expansive learning cycle.

The initial categorization linking participants’ statements to the nodes of the activity theory framework helped to make visible ideas I might not have seen without conducting this step of the process. However, these separate strands of data did not hold on their own; they were interwoven with the contextualized, dynamic relationships between the participants’ activity and each node of the framework. If I had described our conversations by separating statements according to the nodes, I would have lost the relationships connecting the nodes and how these relationships generated new ideas and changes. If I had presented my analysis chronologically – through an exploration of historical, present, and future excerpts – I would have lost Vygotsky’s dialectical notion of history and culture as a “living, continuous flow of practices” (Vianna & Stetsenko, 2006, p. 89). Returning to Patton (2002), I was drawn to his statement about how “concepts are never a substitute for direct experience with the descriptive data. What people actually say and the descriptions of events observed remain the essence of qualitative inquiry” (p. 457). The nodes of the activity theory framework helped to
initially categorize the data from the transcripts. Participants’ ideas brought to life the dynamic and dialectic relationships between theory and practice; from the analysis of these relationships, themes emerged.

I initially aligned my research questions with the states of Engeström’s (2001) expansive learning framework to give structure to my formative intervention research process. What I had not realized at the outset was how this framework would also inform my analysis of the needs participants identified at each state of this expansive learning cycle (primary questioning, secondary double binds, tertiary resistance, quaternary reflection and realignment). Participants’ early efforts to clarify their vision for a focus on competencies reflected Engeström’s Primary or Needs State. Examining the data, I realized I had not fully appreciated the extent to which my research questions had been a powerful formative intervention tool as participants moved from their abstract ideals about competencies to more concrete, practical understandings of instruments, models, and processes in relation to our local contexts.

Re-examining the themes that were emerging from my coded data, I considered how participants’ needs shifted as they moved from questioning ideals to implementing instruments in ever-broader contexts; essentially, this was their journey through the contradiction states of Engeström’s framework. At each state, I limited my analysis of the transcripts to three themes and three sub-themes that were most central and representative of participants’ words and ideas; I determined which themes and sub-themes to focus on based on repetition, consistency, or clusters of uptake across the sessions. To conclude my analysis and the reflection/alignment state of our expansive learning cycle, I looked at three broad themes at the core of our efforts to stimulate systemic changes in relation to
competencies. Inspired by the notion of meta-competencies, defined as “an overarching input that facilitates the acquisition of output competences” (Delamare Le Deist & Winterton, 2005, p. 40), I refer to these themes as “meta-themes” because they reflect the core of our working group’s expansive learning journey.

At the initial data analysis stage, I was the scribe, the transcriber, the data filterer, and the formative intervention leader. Once the working group sessions were concluded, I retreated into researcher mode to conduct this deeper analysis. I went from scribe to the weaver of participants’ stories, so that outside readers might learn from our specific experiences. My analysis process was really two parallel expansive learning cycles: one that informed the internal working group and a second that informed my analysis in order to present it to others.

**Evolving Factors Affecting this Study**

The working group sessions ran from May 10 to November 15, 2017, but the start and end-points of our activity were naturally blurred because participants were already engaging with elements of the curriculum change process prior to this study. In July 2016, when the Ministry of Education announced that student assessment of core competencies would be one of the criteria in teacher reporting on student progress, this announcement added a timely stimulus for this study. It also increased educational leaders’ motivation to understand competencies. As our District Department of Learning team opted to focus on the 2016-2017 and 2017-2018 school years to implement new assessment instruments, I saw an opportunity to examine our district’s process for aligning its reports with the Ministry’s reporting guidelines. The timing of the Ministry
and District’s experimentation with reporting practices aligned well with my research focus.

While these additional stimuli were exciting, they also added a level of uncertainty as many key change components were still at a fluid “interim” stage. The motives driving educators involved in this learning process were shifting as the curriculum changes moved from the K-9 grades into the graduation years of grades 10, 11, and 12. As the new curriculum was still being revised, changes to terms and content on the Ministry of Education website meant that local districts were also having to be flexible with their interim documents and models.

Each district had local variables influencing educators’ perspectives and motives. By limiting my research to the district with which I was familiar, I was able to focus on local leaders’ interactions with the competencies of the new curriculum without learning the culture of another district at the same time.

**Trustworthiness, transparency, and reflexivity.**

*Trustworthiness* is defined in terms of “transferability, credibility, dependability, and confirmability” (Given & Saumure, 2008, pp. 895-896). Hiles (2008) suggested trustworthiness is also reinforced through *transparency*. In an effort to ensure the entire research process was trustworthy and transparent, I have included a detailed audit trail of the steps in my research process, first in this chapter and also in the appendices of this study. I began by presenting a detailed proposal to the university and the school district prior to initiating this study (see Appendices A and B).

Through their informed consent (Appendices C and D), continued involvement, and ongoing feedback at each step in the process (Appendices E to M), participants
greatly contributed to ensuring the transparency, trustworthiness, and reflexivity of this study. As an example, after each session, I sent participants a session summary (see Appendix F). I brought these summaries and the actual transcripts as formative intervention tools to subsequent sessions. I constructed three activity theory charts to show participants a visual representation of their comments on historical, present, and future-oriented experiences (see Appendix H). Participants referred to these documents and visuals during the sessions. In our discussions, participants also shared some of the theories that informed their thinking about competencies, learning, and meaning-making.

Regarding reflexivity, Coghlan and Shani (2008) referred to a researcher’s first-person voice and reflexive practice in terms of both tasks and skills. I saw my task as supporting a spirit of inquiry in our working group, while holding and valuing my skills in my dual role as researcher and participant. For this, I needed to question my assumptions, practice self-awareness, hone my reflection skills, and consider my ability to act both politically and authentically (Coghlan & Shani, 2008). As a member of the school district, I was an insider participant. My long-term insider knowledge and experience was a strength for my participant role in this study.

I also needed to consider my formative intervention tools based on my researcher knowledge and experience in order to stimulate participants’ zones of proximal development. Formative intervention research is based on the premise that participants and researchers draw on formative intervention tools as mediating instruments to spark potential new directions. I needed to balance my intentional interjections without dominating the group discussions. I was more often actively listening to learn from my fellow educational leaders’ initiatives before injecting new stimuli through my focus
questions. As a researcher, it was my role with the working group and in my analysis to delve into the underlying assumptions of colleagues’ responses, as well as my own.

To balance my researcher-participant stance, during the working group sessions and during my analysis of the transcripts, I reflected on my participation to gage my ability to listen, share, question, and learn from colleagues. When participants expanded the competencies discourse into their areas of expertise, like Aboriginal understandings and ecological principals, I incorporated their input as formative intervention tools for subsequent sessions. I relied on feedback from participants about the transcripts and in follow-up conversations or emails. I also invited participants to do a member check of the transcripts, the data charts, and the executive summaries for accuracy. As I prepared this dissertation, I initially sent each participant the exemplars of their ideas that I proposed to use and asked for their input. Two participants asked to read the first draft of the dissertation and other participants asked to see specific sections based on the summary tables I shared. Moving between the working group processes and the framework guiding this study was challenging. For this, I relied on the members of my dissertation committee and other critical friends prompting me to clarify Engeström’s and others’ work in activity theory and formative intervention in relation to the working group process. At the end of the process, I sent all participants a copy of the final version of my dissertation and my presentation for the oral exam.

**Ethical considerations for this research.**

As an employee of the district, I am an “agent of the board” and bound by its fiduciary duties. As a member of my local School Administrators’ Association, the BC Principals’ and Vice-Principals’ Association, and the BC College of Teachers, I am
bound by the standards of my profession. As a doctoral candidate at UBC, I also follow the standards of the Behavioural Research Ethics Board (BREB). In considering the implications of my comments, observations, and findings, where personal stories might have identified participants, names identifying colleagues, and specific references to schools were not included in my analysis. While I would have preferred to introduce the participants by their real names to honour their contributions, pseudonyms protect their identity; however, I use my name for transparency. I excluded elements outside the realm of consent for this study, like samples of student work. Feedback from participants and from my dissertation committee addressed potential ethical concerns in the collection, publication, and dissemination of this study.

**A Reflexive Summary of this Research Design**

In this chapter, I described the process I used to design and carry out this formative intervention research. Coding the data from the working group transcripts by using the nodes of the activity theory framework was appropriate for an initial sort of the data. It was also an essential step that allowed me to discover sensitizing concepts I might not have noticed just by reading through the session transcripts. However, sorting by subjects, instruments, rules, community, roles, and object did not sufficiently illustrate the relationships between participants’ ideals and their efforts to stimulate change and shift practices. The intrigue of activity theory is in the expansive learning interactions and relationships within the activity system so a discussion of each node of the activity theory framework would have been incongruent with the iterative process I was observing. I needed to examine how participants’ experiences in this activity were interwoven with
the needs they identified as they worked with communities to bring about change. These expansive learning needs became the themes for my analysis of this study.

The formative intervention research design and expansive learning matrix supported my analysis of the working group data. Built into the research design, participants reviewed the sensitizing concepts I had identified and expanded on these at subsequent sessions (see Appendices E through J). Throughout this analysis process, the members of my dissertation committee posed critical questions about how I was aligning theory and practice to ensure my approach was trustworthy, transparent, and reflexive.

In Chapters 6 through 9, I present my analysis of how the leaders in this working group co-constructed their understandings. In each of these chapters, I respond to one of my four research questions. Chapter 6 focuses on the “Questioning or Needs State” of Engeström’s expansive learning framework by examining the primary contradictions and needs participants expressed as they co-constructed their conceptual understandings of competencies. In Chapters 7, 8, and 9, I continue my analysis of this expansive learning cycle by describing how participants in this group shifted their conceptual understandings from what activity theorists call “abstract ideas or germ cells” to more concrete, complex and practical understandings related to our contexts (Engeström, 2010; Vygotsky, 1978).
Chapter 6 Questioning Conceptual Understandings

In this chapter, the needs or questioning state of Engeström’s expansive learning cycle (2010) guides my analysis of my first research question: How were educational leaders co-constructing their understandings of competencies as learning?

Engeström (2010) presented the first epistemic or learning action for ascending from the abstract to the concrete as a needs state focused on “questioning, criticizing or rejecting some aspects of the accepted practice and existing wisdom” (p. 79). For example, in this study, participants were quick to reject the notion that learning applied only to children. Carol acknowledged she “wanted to expand [her] own practice while facilitating that with others” (1.2). Participants were focused on their own learning while simultaneously mentoring colleagues and students. Instead of describing learning environments as being teacher-centred or learner-centred, I was hearing participants reflect on how sometimes students were assuming leading roles, and how educators were both leading and following depending on the object of the activity. I consider all members of our learning communities as potentially both learners and mentors.

Participants examined competencies through their own ideals and visions for learning. While several sub-themes emerged from their conceptual ideals about competencies, I saw three broad themes defining their efforts to support learning communities: 1) a need to positively engage learners’ identities, 2) a need to focus on learning as a process, and 3) a need to envision competencies as a systemic change. As participants identified their ideals and visions for learning, they also identified where they needed to focus their attention. These conceptual ideals formed the sub-themes of my analysis of how participants began co-constructing their understandings of competencies.
A Need to Positively Engage Learners’ Identities

The first theme focuses on participants’ ideals for improving learning through understandings of competencies that positively engage learners’ identities. Participants expanded on three sub-themes contributing to their conceptualization of this ideal: 1) a need to honour learners’ personal and cultural identities, 2) a need for learners to engage with and own their learning, and 3) a need for learners to actively contribute to their learning communities. Participants’ comments were shaped by their interactions with the new curriculum. In each subsection, I have included definitions of the facets of personal and social competencies from the new curriculum so readers may have access to the same formative intervention tools as the participants.

A need to honour learners’ personal and cultural identities.

Participants described their aspiration that a competencies focus would enable learners to feel a sense of belonging to their learning communities, and that these communities would honour learners’ identities. This ideal appeared to be consistent with how the new curriculum defined positive personal and cultural identity as:

The awareness, understanding, and appreciation of all the facets that contribute to a healthy sense of oneself. It includes awareness and understanding of one’s family background, heritage(s), language(s), beliefs, and perspectives in a pluralistic society. Students who have a positive personal and cultural identity value their personal and cultural narratives, and understand how these shape their identity. Supported by a sense of self-worth, self-awareness, and positive identity, students become confident individuals who take satisfaction in who they are, and what they can do to contribute to their own well-being and to the well-being of their family, community, and society. (BC Ministry of Education, 2015c)

While curriculum documents reflect the policy agenda of the Ministry of Education, these policies often follow societal ideals. It seems consistent that for students to “have a
positive personal and cultural identity,” their communities also need to support and honour learners’ “personal and cultural narratives.”

In our group, Dana noted how weaving Aboriginal understandings into the curriculum had pushed educators into an area where few had expertise, creating a need for educators to honour personal and cultural identity in new ways.

I thought it was exciting that we are bringing opportunities to students to bring their understanding of who they are individually and culturally instead of having schools attempt to define for them who they are and what their culture is because, in most cases, it has really missed the mark… When we went to school, representations of Aboriginal people were very stereotypical and generalized and not based on the local situation or accounting for diversity at all. (Dana, 1.2)

Encouraged to see learners positively enriching collective learning at school, Dana appeared hopeful that a competencies focus would build on identities learners brought with them to school, rather than trying to change learners’ identities to fit a certain mold or standard.

Ellen observed how some learners’ past experiences had negatively impacted their self-esteem, their sense of belonging, and their identities as learners.

The school I came from was a very academic school and many people left that school or did not make it through because of it… They could have been in a different environment with teachers that fostered that part of making them successful and they would have probably been more successful citizens of this world had they not had such a negative experience. (Ellen, 2.39)

Ellen’s past experiences motivated her to question how a focus on competencies in learning communities could do a better job of honouring diverse personal and cultural identities, suggesting “ultimately, we want students to have this real sense of identity as to who they are and to be present in the learning process” (1.8). She viewed learners’ positive sense of identity as an important pre-requisite for their engagement at school.
Bridget was inspired by the prospect of a competencies focus bringing greater acceptance of the diverse experiences shaping learners’ personal and cultural identities.

What you said about the competencies honouring the diversity among students and the power for that really hit me. When we are able to get in a place where our students have an excellent understanding and are able to talk about where they are with their competencies, they begin to see we are honouring differences and we are honouring the progress we are making as individuals rather than looking at each other, “I’m the same as that person.” (Bridget, 1.7)

Bridget seemed hopeful that educators would learn to celebrate diversity instead of seeking one best practice to meet the diverse needs of all learners. As participants shared their visions for honouring positive personal and cultural identities, they envisioned both students and educators as learners. Viewing the new curriculum from this perspective, participants wanted all learners in our system to see themselves as belonging to our learning community as competent and valued contributors.

**A need to engage with and own learning.**

With BC’s previous curriculum, the Integrated Resource Packages, or IRPs (BC Ministry of Education, 1995), educators had focused on large sets of prescribed learning outcomes in each subject area. Like Bridget, participants often referred to this emphasis on outcomes as “learning being done to students,” rather than “with them.”

Something we noticed about our students was they were not as actively involved in their learning… There was not that sense of ownership. It felt like what happened at school was just happening to them as opposed to them being part of the process. (Bridget, 1.2)

Bridget’s conceptual understanding of competencies included increased student involvement by engaging them more with the learning process.

Sinnema and Aitken (2013) described how competencies were being written into national curriculum documents as a form of “student agency” involving personalization
and choice so students would want to show and share their competencies. They suggested that education departments like those in Wales and Scotland had taken the view that students had a right to be heard and that “all pupils should have an opportunity to have their views considered when decisions are taken that affect them” (p. 152).

In a similar vein, in the context of secondary students, Carol viewed “student engagement with their own learning, their self-awareness” as the most important means to allow them “to take ownership of some of the directions of their learning and their self-assessment” (1.8). She viewed the competencies focus as a positive change for building awareness of students’ roles as life-long learners and citizens in a broader society.

I see the direction of the new curriculum as being positive for engaging students in this new landscape that they are navigating... if we can get our heads wrapped around how the new curriculum will engage them... we can move a lot more forward than just curriculum. We can move that whole citizen forward as well. That is what brought me here. (Carol, 1.2)

Carol stated that embracing the new curriculum by focusing on the big ideas and competencies may incite students and teachers to become more engaged as citizens. However, first educators needed to figure out what had to change.

Isaac pointed out that his current classroom reality did not necessarily correspond with his efforts to use open-ended inquiry and questioning.

[Students are] still waiting for us to spoon-feed them. Today in class, when we were working on media, I asked, “So what is this ad saying?” I was challenging their thinking and they were saying, “You’re making this really hard for us.” For every answer, I was posing a question back. I think that’s the tension we face with kids because they are so used to having strict criteria and following the teacher’s rules and many kids have gotten really good at doing just that... no more and no less. (Isaac, 4b.3)

Isaac acknowledged that students struggled to take ownership and be more actively engaged because they were used to trying to please the teacher. Consequently, new
approaches were unsettling for learners. He noted that educators need to shift how they communicate their expectations by asking students whether they had given their best effort: “Do you think this is good enough for you?” (4b.4)

Henry, having more experience with older students, expressed his surprise at the level of engagement among younger students who viewed themselves as learners. He questioned how educators could “continue that excitement from grade four all the way through [schooling] so it did not end” (1.10-11). Henry wanted all learners to notice how their engagement in the learning process was helping them shape both their identity as learners and as active contributors to their learning community.

As the participants described their ideals for competencies through increased engagement and ownership of learning, I saw potential overlaps between their ideals in another facet of the curriculum’s definition of personal and social competency:

Personal awareness and responsibility includes the skills, strategies, and dispositions that help students to stay healthy and active, set goals, monitor progress, regulate emotions, respect their own rights and the rights of others, manage stress, and persevere in difficult situations. Students who demonstrate personal awareness and responsibility demonstrate self-respect and express a sense of personal well-being.

(BC Ministry of Education, 2015b)

To work toward these ideals of personal awareness and responsibility, participants focused on creating a sense of belonging so all learners felt confident sharing their identity and actively engaging as members of a community.

Willms (2003), author of the OECD report on Student Engagement at School, also equated engagement with student participation and a sense of belonging, claiming these two aspects pointed to a disposition toward success with schooling and with life-long
learning. What seemed to be missing from Willms’ definition, but was present in our discussions, was how identity linked with actively contributing to society.

**A need to actively contribute to society.**

The conversations in this working group about conceptual understandings of competencies tended to be both future-oriented and focused on larger ideals for our learning communities that encompassed both students and educators. For example, Dana described her ideals for competencies engaging learners in larger societal calls to action, like Canada’s Truth and Reconciliation efforts.

I see education as being a place that can open up that area of really important discussion and learning. However, it is more than that; it is our calls to action. How are students going to see themselves, take what they’re learning, and then apply it to how we are moving forward together? (Dana, 1.8)

Activity theory is based on the premise that individuals and groups work toward future-oriented outcomes by engaging in culturally- and historically- situated actions within their present activity systems. Vianna and Stetsenko (2006) described the co-development of child and humanity as “the child who develops through actions that contribute to (not just participate in) the collaborative practices of humanity (not just of local communities here and now)” (p. 90). Similarly, as the school district focused on ideals of reconciliation, equity, and inclusion, educators needed to expand their collaborative practices to find ways to actively contribute to these broader societal aims with their students.

In the new curriculum’s definition of personal and social competencies, learners’ contributions extended beyond the classroom. This signaled a systemic shift toward
encouraging learners to collaboratively engage with their schooling while honouring their individual identity and their contributions to the learning community.

Personal and social competencies are the set of abilities that relate to students’ identity in the world, both as individuals and as members of their community and society. Personal and social competency encompasses the abilities students need to thrive as individuals, to understand and care about themselves and others, and to find and achieve their purposes in the world. (BC Ministry of Education, 2018b)

Within our working group, we saw this shift toward valuing learners, both educators and students, not only for who they were, but also for how they might contribute their experiences and expertise to their peers to build collective competencies in their learning communities. Bridget worried that as more societal responsibilities like poverty, hunger, and mental health were falling on educators, these were also being passed on to students. As a result, helping learners “find and achieve their purposes in the world” encompassed many unexplored societal layers, pressures, and roles. Isaac wondered whether educators’ increasing range of responsibilities in the classroom and in society were part of the broader ideals we were attributing to competencies.

I know we’re talking about core and curricular competencies and the new curriculum, but I also think maybe some of the challenge is educators re-questioning the purpose of school as a whole… What is our moral purpose? What is our collective responsibility? (Isaac, 1.16)

Referring to the definitions of core and curricular competencies (BC Ministry of Education, 2018b), Isaac compared the challenges of defining core competencies to the challenges of defining skills needed to be successful in 21st-century environments.

That’s the contradiction of what core competency is… it’s moving into this notion of 21st-century learning which is sort of a fallacy in and of itself… here we are 17 years into the 21st century and we still can’t agree what 21st-century skills are. Yet, now we are trying to label 21st-century skills as core competencies and we are still not sure what those are and cannot agree on the core competencies as essential. (Isaac, 4b.27)
To support learners, Isaac was attempting to define the acquisition of skills as one aspect of learning as a process.

In our discussions, some of the resistance being voiced stemmed from participants’ realities: managing classroom behaviours, communicating with parents, collaborating with colleagues, planning and assessing for personalized learning, and keeping abreast of technology and changing systemic demands both within and outside their instructional day. Many of these current responsibilities were already overwhelming. Just as educators’ increasing workloads were blurring the boundaries between their professional work and personal lives, new responsibilities like shifting to a focus on competencies required huge investments of energy.

By co-constructing our conceptual understanding of competencies, participants recognized that as we continue to add layers of societal expectations onto educators, the expectations are, in turn, transferred to students. As a result, we need to ask the limits of what demands can be placed on the educational system. In supporting learners with their journey to contribute to society, did educators and school districts ever get to say, “Sorry, but that work is outside the scope of our role?” Not usually. Participants wondered how to expand learner competencies as active contributors in their present contexts while protecting them from expectations better reserved for future activities and contexts.

Amid these expanding expectations, I found it remarkable to observe how participants embraced the core competencies and their interactions with the curriculum.

[It is] moving from a very traditional, reductionist system toward helping students to grow, emerge, and develop and then watch the resulting ripples throughout the culture within which they're embedded. What can you create… in terms of a person, a culture, a way of being and then ultimately, a world? (Janice, 1.5)
Janice’s understanding of core competencies as a “fascinating experiment in complexity and emergence in terms of human identity and development” (1.5) was the stimulus for her participation in this group. She wanted to focus on collaborative engagement and ownership of learning by valuing contributions, honouring individual and cultural identity, and being prepared to take action.

Janice concluded our initial exploration of competencies by borrowing from local educators’ work with Networks of Inquiry and Innovation (Halbert & Kaser, 2013), where the vision was for all students to graduate with dignity, purpose, and options.

My vision? I would like to develop people who are adaptable, resilient and present, who have a personal, articulated, sustainable worldview, who have personal and community metacognition, passion, dreams, and goals. I would like to help create a system that helps this type of person graduate with passion, purpose, and options. (Janice, 1.13)

As with many of the participants, Janice was focused on the possibility for positive futures. In shaping our conceptual visions of competencies, contradictions in relation to engaging learners’ personal and cultural identities were associated with the challenges of addressing the diverse and divergent range of needs when the demands on educators seem to be continually expanding.

Wanting active participation and ownership of learning is an admirable conceptual aim; achieving that aim in a practical sense with all learners is much more challenging. Cultivating a sense of belonging by honouring identity is a noble ideal, but can one educator with do this with every student? How can educators ensure all students are actively contributing to society? These were questions raised as participants explored their conceptual understanding of competencies.
A Need to Focus on Learning as a Process

Related to the theme of positively engaging learners’ identities, participants co-constructed an understanding of competencies that emphasized learning as a process. In this section, I elaborate on this second theme.

In our roles as educational leaders, we were motivated by the view of learning as an ongoing process because we were constantly reminding educators that this new focus on competencies was not about having all the right answers. Rather, it was about exploring the big questions of the new curriculum. Faye described how she supported educators to distinguish between core and curricular competencies while also helping them to recognize that both are important in valuing learning as a process.

Students self-assess or talk about their growth in a strengths-based model (the core competencies). When children are engaged with their learning and explaining it, they’re more into the core..., but as teachers, we are responsible for the curricular. If you give [children] a chance to self-reflect, they can connect the two. (Faye, 1.3)

In Faye’s efforts to support colleagues, she emphasized learning as a process of engaging, describing, and reflecting. I found her example relevant to explain Boreham’s (2004) notion of how we build collective competence. Faye was supporting educators by helping them see how students “collectively make sense of their understandings,” how they use a “collective knowledge base” to explain their learning processes, and how learners “develop a sense of interdependency” with teachers and peers mediating these processes.

I examine competencies as participants expressed their ideals of: 1) a need to shift from a focus on content to a focus on process, 2) a need to expand metacognitive awareness of process, and 3) a need to mediate social learning processes.
A need to shift from a focus on content to a focus on process.

Participants described a de-emphasis on content and a greater emphasis on learning as a process, not just for students, but for all learners. Even though Gordon did not feel fully prepared for the changes, he craved this shift from an emphasis on teaching content to a focus on learning processes (1.10). Like Gordon, Ellen described how competencies were uncovering formerly hidden, or assumed, learning processes and changing teachers’ relationships with their students.

We have always had this hidden curriculum at work. The fact it is so explicitly connected now to the core competencies, I am seeing a shift in the process of learning, connecting that back to the child versus the curriculum being done to children and students being the recipients of that knowledge. Instead of filling up the vessel, we understand [that] kids are really connected to their learning process so they can then own it and move it forward. (Ellen, 1.3)

For Ellen, there was a sense that the focus on core competencies was creating opportunities to remove barriers and power imbalances for learners in classrooms. Ellen’s ideal was to increase learner agency through awareness of learning as a process. One interesting aspect of this shift is that it allows learners to describe different ways of learning by incorporating their own experiences, examples, and vocabulary. If a teacher’s example is a mystery to some learners, perhaps a peer’s example can make a much-needed connection.

Lauren suggested that, for many educators in her secondary school, the ideal of focusing on process through competencies was unsettling.

When we first got the learning standards and the core competencies, we were reading them over and teachers were saying, “But where is the checklist? There’s nothing here!” Some teachers are so focused on the content they lose the big picture. (Lauren, 2.34)
While Lauren appreciated the freedom of the new curriculum and its focus on process, she recognized that not all secondary colleagues feel that way about this shift. Participants admitted that some educators are more comfortable teaching fragments of content and skills, leading many to feel overwhelmed by the diverse ways that students are interacting with each other and making connections with their learning.

The theme of comfort-discomfort was an interesting tension in this shift in focus from content to process. As educators moved away from the certainty of what content to they needed to cover toward exploring the different ways learners could approach this content, Carol noted how that discomfort was making educators feel less competent.

Another layer to that, is that they are being pushed completely out of their comfort zone and out of their sense of their own competence. You give me a list of content to teach in my area of expertise and I will go learn it and know it so well that I can impart it to my students and I can be the expert. Now, you are giving me core competencies where maybe I do not have such great skills. (Carol, 1.17)

Not having a clear road map to follow was unsettling for many educators, since content was always one area where teachers felt in control. But with the increasing focus on process and approaching learning from many angles, there was a shift in power and control. As participants shared their visions of competencies as a move toward learning as a process, their ideals did not always align with their present realities. For learners to engage in learning as a process and contribute to their learning community, there also needed to be a major shift in how educators approached their roles and their observations of student learning. For educators to shift their focus onto learning as a process, they also needed opportunities to engage in learning experiences where the focus was on the process and not on mastery of content.
Ellen questioned how to encourage educators to focus on the big ideas of BC’s “Know-Do-Understand” curriculum model to engage in learning as a process.

How do we move a profession from some of the things that have been so content-based [knowing] to really figuring out the best ways to facilitate that learning process and engage in those curricular competencies [doing] to get kids to reflect on core competencies? How do we take responsibility for progress along that continuum and how do we unlearn some of the practices that have not been helpful? (Ellen, 1.8)

Ellen recognized that educators need support to change how they plan their lessons. Participants’ ideals about learning as a process were tempered by questions about whether schools have access to quality resources, whether students want to engage with the learning tasks, and whether educators want to “unlearn” some of their practices. Our ideals about learning as a process do not always reflect our working reality or the reality of our colleagues.

**A need to focus on metacognitive awareness.**

Participants suggested that one way to shift thinking processes in the classroom was to consider how a focus on metacognitive awareness helped learners make sense of their expanding competencies. In our group, Henry reflected on how educators could stimulate learners to reflect on their learning as a social and a personal thinking process.

I am encouraged to have more conversations around, “How do we engage kids in metacognitive thinking? How do we elicit that back? How do you bring that to the forefront so kids become very confident and competent in self-assessments?” That is one gap I see as a system. (Henry, 1.4)

Henry saw learners’ discussions of their core competencies as a way of expanding their ability to shape their internal reflections about learning.

Metacognitive thinking was evident in BC’s “Know-Do-Understand” curriculum model, where learners are expected to adapt and use their knowledge, processes, and
understandings to a variety of contexts and purposes. The thinking competency definition referred to this concept as “metacognitive awareness”:

The thinking competency encompasses the knowledge, skills and processes we associate with intellectual development. It is through their competency as thinkers that students take subject-specific concepts and content and transform them into a new understanding. Thinking competence includes specific thinking skills as well as habits of mind and metacognitive awareness. (BC Ministry of Education, 2018b)

In this process, educators and peer mentors play an important role in selecting contexts that stimulate learners to engage in dialogue about their thinking.

Ellen observed how educators also need opportunities to think about how they are learning in order to be able to share their metacognitive awareness with others.

Some educators do not believe they are innovators. They do not know that what they are doing is different from the person in the classroom next to them because there is not that open dialogue. It is not until you bring it to their attention, “Hey, can you share this? What you are doing is exceptional and we want to be growing that!” (Ellen, 2.18)

When learners describe their thinking process to peers, their conversations stimulate not only their own metacognitive awareness but also create tensions and ignite sparks motivating others to think about their learning. Wells (2008) explained how the capacity for speech shaped learners’ abilities for advanced speculation and reflection before, during, and after a collective activity. As learners engage in social dialogue, they expand their ability to interact, individually and collectively, with both their outer and inner worlds. With the competencies focus, metacognitive awareness extends beyond individual thinking about learning to making metacognitive connections that contribute to collective awareness.
A need to mediate social learning processes.

Even as participants considered how the relationship between educators and students might be changing, they recognized the important role educators continued to play in mediating social learning processes. Isaac commented on educators’ roles in helping students understand their identity through positive interactions with peers.

This is really about meeting kids where they are at and involving them in their learning… That is where the core competencies come in. This is teaching you a process; this is teaching you a way of thinking; this is teaching you a way to be; this is going to help you understand something about yourself, whether it be your culture, your identity, what your skills are, and what your areas of growth would be. It is involving students in that process. (Isaac, 1.5)

The ability to involve students in their learning is a relational competence that educators hone throughout their careers as professionals. The challenge for educators is in how to continue this important role of mediating social learning when learners are potentially moving in so many different directions.

With the new curriculum, there was increased awareness of the importance of social relationships between students and teachers. In describing this relationship, Vadeboncoeur (2017), noted the inseparability of these processes: “teachers are continually learning and learners are continually teaching” (p. 15), which needs to be factored into “the range of a teacher’s considerations and decisions when engaging a child, as well as the interests, motives, and cultural experiences the child brings to the relationship” (p. 15). The challenge was in how to manage the learning dynamic when students brought forward ideas from their experiences to be taken up in the classroom, potentially shifting and expanding learning in multiple directions, both for students and teachers. Are all educators capable of navigating these diverse tangents?
Faye referred to this shift as a flip where, even as some of the learning content and processes are the same, learners are expected to take on a more active role.

So there is a flip… The idea is that the system has turned upside down. Now you look to the child to tell you who they are and what they can do and what they need help with and then you encourage them, wherever they are at, to go to the next spot. That is so different from the system [we’ve known] for so many years. (Faye, 1.9)

Shifting practices was not easy, but since the new curriculum provided an opportunity to work toward shifting practices, Faye indicated she was eager to take advantage of this opportunity. Her comments seem to place the majority of the responsibility on the student. In reality, both educators and students have greater responsibilities and are expected to take on more active roles in navigating social learning interactions.

To shift from directing to mediating social learning interactions, Gordon reflected on how some educators might fear a loss of authority or control. Even though he was nervous about the changes, he believed his role was to aid learners in connecting their processes, metacognitive awareness, and social learning contexts.

It gives us the latitude to engage kids, let them make educational choices and let them give meaning to their learning. Yes, it is going to take me totally out of my comfort zone because I will not have control of their learning. But, if the students are learning, they are going to be successful at some point. (Gordon, 1.18)

Like Faye and Gordon, other participants considered that educators were facing a more challenging role with stimulating dynamic social learning processes so that learners are actively contributing, and not passive recipients of content transmitted to them. Gordon commented that he had students who told him “You push us too much” and his response was, “That’s my job” (2.15). When students wanted to stay in their safe zones, Gordon felt it was his responsibility to push them to expand their learning. Educators were still
the critical conductors stimulating students to venture out of their safe zones to actively contribute to their learning communities. How can we expand learning communities to develop individual competencies, while also relying on individuals to contribute to the collective competencies of their learning communities?

A Need to Envision Competencies as a Systemic Change

The BC Education Plan was a stimulus for systemic change. The Ministry of Education’s added requirement that educators include student voice when reporting on progress was a second stimulus that pushed both students and educators to expand their understanding of the competencies focus of the new curriculum. One place where educators could experiment with their understandings was through professional learning communities (PLCs). The district implemented PLCs as a systemic change, embedding collaboration time within the work week. This would allow educators to engage with colleagues and take ownership by initiating changes through an inquiry process.

How as a learning organization, as a district, as a school, do we facilitate this transition [to focus on competencies in the new curriculum]? How do we work with staff members to support, shift, and move, recognize, and value? How do we shape our worldviews and paradigms so that together we can wield skillfully and facilitate that within a child? (Janice, 1.5-6)

Janice further questioned how, as a district, we could work with staff members to support this shift and value deeper understandings of learning.

Participants in this study were already involved in shaping systemic changes in our district connected with the new curriculum and the new reporting guidelines. As a result, their conceptual understandings of competencies were informed both by their visions for the district and by the expectation that, in their roles, they would be designing, experimenting, and implementing systemic changes. As a result of their roles, I noticed
that participants often referred to competencies in relation to systemic changes by focusing on three ideals: 1) a need to have a continuous learning mindset, 2) a need to view competencies as a continuum, and 3) a need to measure learning in new ways.

**A need to have a continuous learning mindset.**

As I examined our discussions around systemic changes in relation to competencies as an expansive approach to learning, I focused on Marissa’s link between our ideals about competencies and Dweck’s (2017) research on growth mindsets.

For the members of my class to know that everybody is learning… for them to have a growth mindset and not a fixed mindset, is huge… It’s important that we model for our kids that we are learning, jumping in like you said, taking that journey with them and modeling the growth.

(Marissa, 3b.18)

Marissa emphasized how, when younger kids were learning to read and were giving it their best shot, their persistence reflected her ideal of competencies as growth learning.

Dweck (2017) contrasted how children working from a fixed mindset focus on achievement and avoid challenging tasks, while those working from a growth mindset have a more malleable view of learning, where problems and setbacks are not seen as failures but as challenges to overcome. Dweck’s observations about adult praise of learners’ efforts was relevant to our discussion of perceptions about competencies.

Praising intelligence created a fixed mindset and a helpless reaction to difficulty… praising the process children engaged in, such as their hard work or their good strategies as the reason for their good performance led to more of a growth mindset and mastery-oriented reaction to difficulty.

(p. 141)

Marissa’s reference to Dweck’s research on praise reinforced our working group’s view of competencies as a continuous learning process where everyone was making an effort and open to learning more. These connections helped us consider how to encourage
learners to take those uncertain next steps to expand their competencies, instead of congratulating them for task completion.

In our discussions about systemic change in relation to a vision of competencies from a growth mindset perspective, Janice was curious about how many schools in the district were “actively using the language of growth mindset with their staffs, in their buildings, with their students and their parents?” (3b.17). Even though we could not answer Janice’s question during our working group sessions, her question stimulated our discussion of competencies as an ongoing focus for systemic change.

Dana described how shifting away from completion of teacher-directed tasks to a perspective where teachers encouraged learners to consider their learning journey as continuous was similar to Aboriginal views of learning.

In the traditional First Nations way, learning was a part of your everyday lived experiences. Formal education started from birth and went until death. Your teachers were everyone around you, young and old. Learning is community-based… it has really shifted a lot over the past few decades to where it is now. (Dana, 2b.1)

Dana’s view of systemic change incorporated her ideal that students learn from many teachers and community experts, “not as guest speakers, but as our teachers and our knowledge-keepers” (2b.1).

To understand competencies as a systemic change requires a continuous learning mindset even around definitions in the curriculum. For example, the Premier’s Technology Council vaguely defined the communication competency as “language, symbols and digital literacy.” But as learning communities interacted with the evolving curriculum, adding their understandings, the communication competency became re-defined in the curriculum as “the set of abilities that students use to impart and exchange
information, experiences and ideas, to explore the world around them, and to understand and effectively engage in the use of digital media” (BC Ministry of Education, 2018b).

The original definition was enriched by the values and beliefs of other learning communities, just as our working group’s understandings of competencies were expanding through our interactions with educators, parents, and students.

A continuous learning mindset allows educators to explore their abstract ideas, so that their layered and intersecting understandings of competencies can become both more complex and more concrete. Faye initially observed that we might never come to a collective understanding of competencies because we all come to this process with our preconceived ideas, expertise, and passions (1.9). Agreeing to work together did not mean we would always agree with each other. Instead, working together was an opportunity to draw on others’ experiences and ideals about competencies to shape the systemic changes in our learning communities.

**A need to view competencies as a continuum.**

Understanding competencies as a continuum was a central theme to envisioning systemic changes in teaching, learning, and assessment practices. This new curriculum was not simply asking educators to seek greater input from their learners. It was asking educators to consider learning processes differently. Learners do not progress at the same pace or perceive learning outcomes in the same way, so viewing learning as an achievement of a prescribed set of outcomes is akin to working from a fixed mindset. If the ideal is for learners to form continuous learning, growth mindset perspectives, then systemic change needs to embrace learning as a continuum that may branch out in many directions for learners.
Faye conveyed how even her grade one learners could have conversations about where they were on a competencies continuum. In her example, a boy was identifying how many more objects were needed to make 20 in each question. His answer?

“I can tell you what I can do to 10.” He scratched out the 20s and said, “It's all going to be to ten now.” I prefer to know that about a learner than the child who answered two questions right and did not try to be innovative with what he could show of his learning. This boy was able to know himself enough to say, “I need to change [this] so I can tell you what I know, because I can't tell you what I know right now in the way you’re presenting it to me.” (Faye, 2.23)

To engage students in ongoing reflection and communication about their learning, Faye explained, “As teachers, we need to adapt so children can show us what they know” (2.23). For Faye’s student to be able to say what he was able to do and what he could not do yet was far more meaningful than being told a score. A view of competencies as a continuum does not diminish learning but rather encourages learners to expand their individual learning goals.

This ideal of a competencies continuum might seem overwhelming to educators still operating from the paradigm that all learners must reach the same pre-determined endpoint for content and skills. But viewing competencies as a continuum allows learners to work together with peers and their mentors to construct understandings, describe their successes, and identify their ‘next-step’ needs and goals. Isaac noted his surprise when students were assessing themselves before handing in their math quiz saying, “Yeah, I got this” or “No, I didn’t get this” (4b.3). He saw this as a major shift. When students had a sense of control of their learning, it was much easier for them to recognize and identify the next steps in their learning continuum. Most importantly, the vision of a systemic shift to competencies as a continuum encourages learners to extend their learning beyond
teachers’ expectations and in directions the teacher may never have considered, enriching the learning experiences of others, too.

A need to “measure” competencies in new ways.

One tension participants noticed was that educators were trying to fit their understanding of competencies into their existing reporting structures. Their attempts to blend competencies and achievement were not working because these systems were based on different ideals. Grading students in relation to learning outcomes and performance levels is based on the assumption that students will perform to pre-determined standards. Success is defined by how well students achieve what they were asked to do. In contrast, participants understand that core competencies allow learners to extend beyond subject area expectations.

At one point in our discussions, Bridget and I suggested that the boundaries as defined by subject areas might even disappear as we envisioned systemic changes to assessment and reporting formats.

I am totally there with the whole idea of self-assessment as the driving tool and just dissolving subjects. The only reason we actually have the curricular competencies is because we felt this need to cordon them off and stick them in a little box. In reality, you are exploring phenomenon and events in the world and your experiences within them. If that is where we could get… wow! (Janice, 1.6)

Janice was excited by this idea, but also acknowledged this was a huge paradigm leap. Nonetheless, the suggestion of doing away with measuring achievement by performance in curricular subjects was exactly what was happening with the changes in the Ministry of Education’s reporting guidelines requiring students report on their core competencies. The object of our activity was aimed at formulating our ideals for a different future, and these ideals were also being motivated by systemic changes in the present. Engeström
and Sannino (2010) described how “expansive learning is manifested primarily as changes in the object of the collective activity. In successful expansive learning, this eventually leads to a qualitative transformation of all components of the activity system” (p. 8).

Dana proposed other possibilities for adding to the argument for measuring competencies differently. “We want students to graduate with dignity, purpose and options. How are we measuring those things? Because right now, the measurements we have are not measurements of dignity or of purpose” (3.23). Discussing Dana’s conceptual ideals for exploring new ways to assess competencies, participants in our group reflected on the contradictions between the purpose of traditional assessment practices using percentages and our ideals for supporting learners with purposeful feedback to help them reflect on the next steps in their learning journey.

Henry and Lauren labeled grades, numbers, and percentages as reductionist measures of performance. They believed grades limited student effort and created a fixed mindset culture, where students are valued through test performance and not for the many unique aspects that define their learning journey.

I found I was always fighting a system that wanted letter grades and quantification where I just wanted to create those experiences… because I knew they worked. Then there was always that thing at the end that the system required something. How do you quantify that? (Henry, 2.10)

That number [percentage] is limiting because students see a number and they go, “Oh, I’m not smart. I can’t do this.” Then they drop the course… because of a number! When they get a higher number in something, they go, “Oh, maybe I am worth something…” (Lauren, 2.26)

Lauren lamented the horrible disconnect between grades to judge learners and valuing learners as the unique individuals they are becoming. The sadness in her voice expressed
the depth of her concern about how grading systems often negatively impact learners’ views about their identity based on their grades rather than by their progress on a continuum, “You just see their self-esteem go up and down, up and down” (2.23). Henry was encouraged to see colleagues questioning assessment practices. “That is a big first step… reflecting on your practice. Does this make sense? Does this move learning forward?” (6.3). Even as participants noticed tensions around assessing competencies, they had a sense that educators want to engage in changing assessments.

A district PLC rubric that uses a canoe metaphor helped to shape the abstract ideals we were formulating about envisioning systemic changes for measuring learning.

I don’t feel competent in this yet because I am just dipping in and I’m scared to make waves. How does that metaphor move us forward in our understanding of competencies? What is another metaphor? Competencies is an interesting word because it really shifts how we think about what we do in education. We want kids to be competent, but for what purposes? Our answers will shift and change depending on our focus. (Karina, 4.17)

As participants in this study worked with colleagues across the district, they sometimes used metaphors and examples from their experiences to make connections and engage educators in questioning their purposes for measuring learning.

If our vision to measure competencies as a continuum was a systemic change, then, to be coherent, we need to shift how we measured educators’ learning as well.

Our educators have their own personalities and stuff to get through. We have to figure out a multitude of ways to break through that because one way is not going to work for everybody. It is just like when we work with our students with these competencies. We have to recognize them as individuals and be questioning, “What's the measure of success for that student?” So for teachers, when we were talking about small steps, what is the measure of success for that teacher? (Bridget, 1.20)

Bridget suggested a need to apply our ideals about competencies to teachers. Professional performance reviews, a common source of tension for educators, were often seen as
judgments about educators by individuals in power. Yet, these same reviews, explored as an expansive learning continuum, can allow educators to focus on their professional learning goals. In relation to this reflection process, the difference is in the purpose.

Dana considered that feeling valued, respected, and effective was essential to employee job satisfaction and ongoing learning in our system. “So, how we talk about individualizing education for students, we need to be open to doing that for our staff members as well so they feel valued and respected and their skill sets and their time are being honoured” (4.13). She also wondered whether adult learners were feeling valued through the system’s ways of assessing or “measuring” professional competencies.

Thinking about the competencies as they apply to our staff, they have their different strengths and we have the expectation they are all going to be able to meet this diverse range of needs. But their strengths are not necessarily in all areas. Some are stronger academically, some are stronger culturally, and some are stronger with the social-emotional. How are they feeling when we expect them to be able to do all of it? In thinking about job satisfaction, how are people feeling about their work? (Dana, 4.11)

As part of this conversation about ensuring systemic changes to foster learning for all members of our learning communities, our group questioned how to mediate adult learning conversations with a competencies continuum focus. Our belief in the need to validate learner identity and to encourage a view of learning as a process informed our ideas as a working group about the aims of systemic change in our district. This was an important consideration if we were to be authentic about valuing lifelong learning.

Otherwise, there would be a significant disconnect between our vision of competencies as a systemic change and our practices for “measuring” growth. If learning is continuous and expansive, then we needed to consider our ways of measuring learning, not learners, be they children or adults. How were these beliefs reflected in district practices?
Primary Needs: Negotiating Conceptual Understandings

In this chapter, I examined how research participants negotiated their conceptual understandings of competencies by examining their ideals: engaging positively with learners’ identities, focusing on learning as a process, and envisioning competencies as a systemic change. This reflects the primary needs state of Engeström’s expansive learning cycle, in which an abstract, germ-cell idea gradually takes on more concrete, complex understandings through questioning existing practices.

As participants reflected on their ideals about competencies, they recognized that social, cultural, relational, and structural factors were influencing learners’ ability to explore ways of knowing, doing, and understanding through a competencies lens. Even though our group was coming together to focus on co-constructing a shared understanding of competencies, how we came to understand this concept was based on our contextualized expertise and lived experiences in our various learning communities. As participants in this study elaborated on their conceptual ideals for systemic changes and moved from ideas to actions, I offered this idea as a formative intervention tool for encouraging colleagues to ask questions about their conceptual ideals and to begin taking next-step practical actions:

Explore the questions that are meaningful to you. All of these questions will move us forward as a school, but if we all go in the same direction, someone’s not going to be passionate about that one question. If we are going to model personalized learning for our students, we have to allow our staff members to be able to do the same. If we are going to do growth plans, we have to ask, “What is your personal growth direction? What would you work on?” and then spend time doing just that. (Karina, 4.13)

In Table 8, I summarize the themes of our group’s contextualized understandings of competencies, alongside the definitions of the core competencies from the curriculum.
Primary Needs: Conceptual Understanding of Competencies

Table 8

| What were the primary needs participants identified in co-constructing their conceptual understandings of competencies? |
|---|---|---|
| A Need to Positively Engage Learners’ Identities | A Need to Focus on Learning as a Process | A Need to Envision Competencies as a Systemic Change |
| These themes emerged from participants’ expressed needs to… |
| - Honour learners’ personal and cultural identities | - Shift from a focus on content to a focus on process | - Have a continuous learning mindset |
| - Engage with and own learning | - Focus on metacognitive awareness | - View competencies as a continuum |
| - Actively contribute to society | - Mediate social learning processes | - “Measure” competencies in new ways |

In this analysis, I also considered participants’ negotiated conceptual understandings of competencies with the core competencies as defined in the BC Education Plan…

<table>
<thead>
<tr>
<th>Personal and Social Competency</th>
<th>Thinking Competency</th>
<th>Communication Competency</th>
</tr>
</thead>
<tbody>
<tr>
<td>...is the set of abilities that relate to students' identity in the world, both as individuals and as members of their community and society. Personal and social competency encompasses the abilities students need to thrive as individuals, to understand and care about themselves and others, and to find and achieve their purposes in the world.</td>
<td>...encompasses the knowledge, skills and processes we associate with intellectual development. It is through their competency as thinkers that students take subject-specific concepts and content and transform them into a new understanding. Thinking competence includes specific thinking skills as well as habits of mind, and metacognitive awareness.</td>
<td>...encompasses the set of abilities that students use to impart and exchange information, experiences and ideas, to explore the world around them, and to understand and effectively engage in the use of digital media.</td>
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The primary needs identified in this chapter influenced our group’s inquiry into the next steps of co-constructing our conceptual understandings of competencies to support our learning communities. In Chapter 7, I analyze how this working group created and employed mediating instruments to stimulate and support a transition from their conceptual ideals about competencies to working with practical, contextualized understandings of competencies.
Chapter 7 Mediating Shifts from Ideals to Practices

In this chapter, I shift my focus to consider the mediating instruments educational leaders are accessing and creating to support their colleagues in co-constructing their conceptualization of competencies. I examine participants’ efforts to move from existing practices toward ideals, including the need to positively engage learner identity, focusing on learning as a process, and envisioning competencies as a systemic change. This shift also constitutes what Engeström (2010) referred to as a second state of the expansive learning cycle, i.e., the double-bind state where participants challenge the contradictions of historically evolving tensions in their current practices by seeking new models and solutions to help them move in the direction of their ideals. To negotiate through this double-bind state with their learning communities, participants identified new mediating instruments needed to stimulate a shift in the existing rules, community beliefs, and division of labour in our district toward a competencies focus.

What supports were needed for educators to be comfortable with the curriculum changes? In many ways, our working group process was an effort to enhance the competencies of teachers working with a new curriculum that was challenging the practices of many. Our efforts were aimed at validating educators’ roles by helping them understand the changes and why these changes were important, as well as helping them see how they were playing a role in constructing the changes taking place.

In this chapter, I summarize some of the ways participants worked to support colleagues with addressing the needs they had identified. For example, to positively engage learners’ identities, the working group saw a need to shift beliefs about learning by engaging educators in collaborative support practices like PLCs. To shift practices
toward a focus on learning as a process, participants described the need for a shift in roles, rules, and mediating instruments that could support this ideal. Finally, to act on their vision of competencies as systemic change, participants needed to challenge existing assumptions about assessment and propose new models for assessing competencies. To map out some of the connections between participants’ ideals and the mediating instruments they were accessing or creating to move toward their ideals, I expand on Engeström’s second generation activity theory framework (1987) (see Figure 8).

![Diagram showing Engeström’s second generation activity theory framework]

**Figure 8.** Some of the Mediating Instruments Identified by the Working Group

Working from this framework, and from the secondary needs state of Engeström’s expansive learning cycle, I show how participants moved from their conceptual
understandings of competencies to co-constructing practical solutions for working through double-bind challenges and working toward their visions of competencies.

This movement from identifying double-bind tensions and needs to proposing tentative solutions corresponds with my second research question: What instruments were educational leaders accessing and creating to support colleagues with co-constructing their understandings of competencies? As I analyzed how participants were drawing on existing instruments (tools, processes, models, or signs) or creating new ones, I noted that their next-step questions often began with “How…” “How do we create the experiences that allow kids to transform and hold that awareness in and of themselves, to move forward, and to create their own journey and path?” (Janice, 2.30). “How do we shift away from the idea that as teachers we are not expected to be the holders of all knowledge anymore; that we are facilitating learning instead of providing knowledge?” (Dana, 2b.5). I shared my observations for the group to reflect these “how” questions.

Embedded in these “How…” questions were the realities of participants’ experiences with learners who have diverse needs, interests, and degrees of motivation. The open paths of the new curriculum created uncertainty about how to support learners navigating multiple pathways. How can participants use their conceptual understanding of competencies to mediate supports in the form of new or adapted instruments in the form of tools, models, processes or structures that would begin to shift practices? In this chapter, I analyze participants’ efforts to mediate shifts from ideals to practices as they attempted to address: 1) a need to engage in collaborative support practices; 2) a need to create instruments that support learning as a process; and 3) a need to design new models for communicating competencies.
A Need to Engage in Collaborative Practices

In addition to engaging with students, an obvious theme for participants in this study was a need to engage with educators in collaborative practices. Participants were already supporting colleagues through Professional Learning Communities (PLCs), the Aboriginal Equity Scan, Networks of Inquiry and Innovation (NOII) teams, and district-wide assessment and reporting teams. Considering their roles, Lauren’s description of her first experiences with implementing inquiry practices with students was surprising.

What really struck me was that if I had not had my colleague supporting me it would not have happened. There is no way. I would have said, “Let’s abandon this. Let’s go back to the old way.” So that is the big take-away. If you want staff to do this, they are going to need supports to bring this into their classrooms. You cannot do this in isolation. (Lauren, 2.13)

Through their own implementation efforts, participants understood many of the tensions colleagues were experiencing with shifting their practices to focus on competencies.

Janice noted how secondary educators needed support and reassurance as the new curriculum moved from the elementary grades into the secondary years.

There is a lot of confusion. It is like everybody’s ploughing through a swamp and nobody really knows what stable ground is. I watch the confusion on their face [staff] as they lean in and then rock back and forth and fidget in their chairs. I say, “OK, let’s break it down, let’s get it into its simplest pieces and start to build it up.” Then I see their body language relax as they give themselves permission not to know. (Janice, 3.3)

With colleagues feeling professionally vulnerable, Janice had to balance her desire to push for change with colleagues’ need for time to build connections with the competencies focus of the new curriculum. Participants’ views on engaging in collaborative practices are reflected in the three subthemes in this section: 1) a need to expand collective competencies; 2) a need to build trust and acknowledge vulnerability; and 3) a need to mediate tensions and interventions.
A need to expand collective competencies through collaborative practices.

Henry acknowledged that educators are caught in a double-bind because, even though educators often shared the ideals of the new competencies focus, their existing practices did not align with the principles of the new curriculum. Educators needed time to unpack these changes with colleagues in the contexts of their workplaces.

I think we are getting a sense of the theory but it’s the practical application: How do you actually make this work? New teachers are coming in with [core and curricular competencies] being the only way they know without any idea of how to apply it in practice. Then, we have experienced teachers who are saying, “I don’t even know how to practically apply this.” What we have is this situation where new or seasoned, there is a lot of not knowing, not just trying to make sense of it, but how to actually operationalize it? There is confusion and no expert to talk to and ask, “How do you do this?” (Henry, 5.2)

Educators need collaborative spaces, like that of our working group, to work through their questions and explore their next-step actions for shifting practices toward their co-constructed ideals and visions.

Engeström (2001) summarized an activity system as a community “of multiple points of view, traditions, and interests” where multi-voicedness was “a source of trouble and a source of innovation, demanding acts of translation and negotiation” (p. 136). In striving to make explicit the connections between our understandings of competencies and our practices, Dana questioned whether our communications about competencies to colleagues, students, and parents truly reflect our intentions and values. “How is what we are doing really reflective of what we are wanting here? Is it the acquisition of knowledge, skills, and ability or…?” (3.19). Her question emphasized the importance of our working group’s process of collaboratively considering our ideals about competencies as we looked to shift teaching, learning, and assessment practices.
Ellen explained how the resistance she encountered in her conversations with colleagues was sometimes a result of misconceptions about which teaching and assessment practices needed to change. “[T]here is a gap in what [teachers] think they are supposed to be doing. When you actually sit down and dig into ‘What are you thinking this needs to look like?’ – There are misconceptions” (1.20). One misconception was that all students need personalized learning plans when this was not the case.

Gordon and Marissa added to Ellen’s observations about gaps in understanding by commenting that, despite their beliefs about encouraging others to make changes, when they felt under pressure or uncomfortable or were lacking time to reflect, they also resisted by retreating to their familiar practices. “Just because you have beliefs about learners and new ways of doing things, I think you are right, in a new situation, you go back to the way you were taught and what you are comfortable with” (Marissa, 2.8).

Another area where participants supported each other was in challenging what Katz and Dack (2013) called confirmation bias, where educators sometimes got stuck seeking only information that confirms their preconceived beliefs. To work through misconceptions, resistance, discomfort, and confirmation bias, while also recognizing that educators’ motives for engaging in new practices would differ, participants appreciated the safe space of this working group to learn from each other and question the multiple ways their colleagues were shifting practices in their learning communities.

The notion of safe spaces for ongoing learning opportunities was also in the research literature the district shared with educators to initiate collaborative dialogue.

To make significant changes to their practice, teachers need multiple opportunities to learn new information and understand its implications for practice. Furthermore, they need to encounter these opportunities in environments that offer both trust and challenge. (Timperley, 2008, p. 15)
Timperley’s research from the International Academy of Education (2008), along with Groff’s (2012) practitioner guide to the OECD research on *The Nature of Learning*, placed learners at the centre by focusing on the social and emotional nature of learning, by recognizing individual differences, stretching all learners, and building horizontal connections across the disciplines and across communities. Participants suggested these principles also apply to educators as they are learning about competencies.

With the district’s initiative to embed school-based Professional Learning Communities (PLCs) into the work week, educators had ongoing opportunities to examine their practices with colleagues in relation to the new curriculum and its focus on competencies. Wenger-Trayner (in Omidvar & Kislov, 2014) described these Communities of Practice (or COPS) as the “primary loci of learning, which is seen as a collective, relational, and social process” with “social learning capability as the most fundamental aspect” (p. 266). Being able to lead, collaborate, and work in teams is not new, but Chalkiadaki (2018) added that the “contemporary student and future citizen and employee needs to be able to do so in environments characterized by the challenges posed by diversity” (p. 11). Educators were turning to their colleagues more frequently for ideas to address new challenges posed by expanding notions of diversity in learning.

One emerging realization in our working group was that the claim to mastery was fading as the competencies focus implied continuous learning *for all*.

Nobody is a master. There is no master anymore. I think that is a shifting paradigm as well of the view of people in leadership… At the September Pro-D Day when we were looking at the core competencies, “I don't think the Dalai Lama could actually be at level 5 or 8.” (Janice, 1.22)

Janice noted how even the most competent individuals in society could strive to become more proficient. Accustomed to operating within a system where success is measured by
tasks completed and personal mastery of skills, participants, too, were shifting their perspective to question their next-steps in learning. Boreham (2004) proposed a theory of collective competence that included collective sense-making of events in workplaces, developing and using a collective knowledge base, and developing a sense of interdependency. Our discussions about professional collaboration focused on learning how to plan and teach in new ways, how to engage all learners in learning processes, and how to value diverse efforts to build a collaborative learning community. This process would take time, mentoring, expertise, trusting relationships, and a belief that experimenting and persevering with this long-term view of learning is worthwhile.

Like Engeström’s third generation framework in activity theory, our school PLCs, district professional gatherings, and our working group were examples of how diverse groups were working toward a shared object of improving learning in our district. Wenger-Trayner’s (cited in Omidvar & Kislov, 2014) more recent work also focused on interactions between multiple communities and systems.

Instead of focussing centrally on a community of practice and membership in that community of practice, the focus is more on multiple communities and systems of practice, landscapes of practice, and identity as formed across practices. More practically, there is also an emphasis on learning capability as a characterization of those systems and the relationships that exist within those systems. (p. 270)

Schools in our district were interacting to co-construct diverse but inter-connected understandings of competencies. Sharing examples of school-based understandings, participants were expanding their ability to support collective understandings of competencies by creating school inquiry projects, sharing resources, co-designing assessment models, and planning for district gatherings. I was surprised by the frequent references participants made to a need for more professional collaboration spaces like
ours, where educators could come together to question practices and examine beliefs about learning in the context of their existing realities and their future-oriented ideals.

**A need to build trust and acknowledge vulnerability.**

In my observations of the shifts taking place in our district, I found it inspirational that, even as participants admitted to feeling vulnerable in their interactions with colleagues and students, they were finding the courage to take risks and engage in processes that challenged their beliefs about their practices.

We have to learn this together with our students. That is a different way of feeling; it is a different way of understanding... of being an educator... we are learning this *with* our students and making that okay. (Janice, 1.22)

You have to be humble and willing to admit that you do not know and that you still can learn. And I think [learners] become less afraid of taking risks if you are willing to take a risk. (Lauren, 3b.13)

Janice and Lauren believed that, if they could support educators to take risks with learning, then educators would also encourage students to take risks. Participants recognized that when we disturbed learners’ safe zones, they often felt more vulnerable. However, if learners can trust in the support of peers and mentors as they take learning risks, then they are generally more willing to engage in the hard work of experimenting with the challenges of the new curriculum and its focus on competencies.

Setting aside time within the school day for PLCs had created a space and time for examining practices. However, participants suggested that allocating time to explore contextualized problems of practice is less dependent on educators’ professional capabilities, capacities, or competencies, and more dependent on the relational trust between the members of the learning community.

We can read research about effective PLCs: it’s student-centred, it is having clear expectations and samples of work... [But] nobody wants to
be the first person in the center of the fishbowl because it is vulnerable and
difficult. When PLCs in schools are formed out of necessity as opposed to
trust in a solid community, it makes it hard to be vulnerable. Colleagues
may not be the persons you feel most comfortable with. (Isaac, 2.17)

Isaac’s observation reflected participants’ views on supportive learning environments
where colleagues could be both vulnerable and safe expressing their needs and ideals.

Carol admitted to feeling out of her comfort zone by the enormity of expectations
around expanding learners’ competencies as active, contributing members of society.

You are asking me to become a little bit vulnerable. We need to be
cognizant that this might be where some of the resistance is coming from.
We are asking teachers to understand their own core competencies while
guiding students in their core competencies. (Carol, 1.17)

These feelings of vulnerability emerged in other ways during the group’s discussions. For
example, Lauren sensed this curriculum change was asking teachers to put themselves out
there; in taking that risk, colleagues were feeling exposed and fearful.

What I sense in some teachers is fear. They’re scared because they always
want to do the best they can, and now they don't know how to do it,
because they don't have this rigorous scaffolding [the previous
curriculum’s prescribed learning outcomes] around them. (Lauren, 3.10)

By admitting to feeling uncertain, participants empathized with colleagues’ nervousness
around engaging with competencies, while helping students and parents to take similar
risks.

Isaac commented that, in the absence of safe spaces to take risks, educators tended
to cling to what they knew, even when they recognized their practice was less effective.

It was one of those things where you jump off that ledge as an educator
and it is failing! You quickly want to get back that structure, to get back
that control, and to get back that feeling of moving forward again… With
new practices, sometimes you take a step forward, and if that does not
work so well, you take five steps backwards, go back to what is familiar,
to what is easier for you as the teacher and for the students. If we wanted
to get theoretical with Vygotsky, it is like pulling back from the zone of
proximal development; it is like just going way back into that comfort zone, into that safe place. (Isaac, 2.13)

Several times during our discussions, the notion of having permission to fail was raised as being a first step in learning. Instead of “That’s it, I can’t do it,” it was important to trust that if “you took a risk and failed, you would have another opportunity… that learning is cyclical with other opportunities to keep on learning” (Karina, 3.5).

To address the fears, Bridget suggested leaders needed to consider how to ensure colleagues felt safe taking risks and could trust they would be supported in their efforts.

We have to make this work safe so educators feel comfortable with taking risks, even just by acknowledging the nature of the job we do. I do not think any of us leave school at the end of the day and go, “Oh yeah! Nailed that!” There is stress. We have been through a lot of change. We need to get that climate of feeling safe, feeling comfortable to take risks, to be vulnerable, and to lean on our colleagues. (Bridget, 1.21)

As excited as we were about the changes in our district, Bridget’s concerns about encouraging educators to take risks resonated. If they were unsuccessful, would this discourage them from taking chances in the future? Could our encouragement help learners view success differently? Building on our lived experiences, our group explored the tensions of experimenting with uncertain outcomes while weaving competencies into educational practices. Working to address colleagues’ fears and feelings of vulnerability, participants sought ways to build trust and balance the tensions in learning communities.

Faye pointed to the paradox in her beliefs about teaching and learning; she saw both as a balancing act, where learners needed structures and routines while at the same time craving flexible and innovative learning experiences.

Therefore, I am constantly balancing the two. Whether my childhood was one way or my new teaching experience as a professional is another, it is truly a balance. The more you teach you can let go of some things. You realize that children, in general, require routine and structure but the
richness of learning happens when you are most innovative and flexible, at a whim almost. So my belief is… combined. (Faye, 2.9)

Juggling this paradox, participants commented that structures and routines helped them feel settled so they could expend energy on ideas that inspired them to try new things.

In their exploration of competencies, participants noted that when encouraging peers to take risks and be vulnerable in shifting their practices, as mentors they needed to consider imbalances in teacher-learner power dynamics. If mentors are driving the process, learners may briefly comply, making temporary, safe changes, and then resume their habitual practices. It was important to assure colleagues that they were safe to experiment with shifting practices, even as outcomes were unknown.

**A need to mediate tensions and interventions.**

In addition to building trust and recognizing vulnerability, colleagues’ and students’ needs shifted with the change process. These shifts required participants to adjust how they mediated tensions and interventions within their learning communities. Engeström (2010) describes formative intervention as a process where, “the contents and course of the intervention are subject to negotiation and the shape of the intervention is eventually up to the subjects” (p. 84). As a result, participants might mediate tensions and suggest interventions to their colleagues, who would then refine the object of their activity and the operational means by adjusting their actions and discourse to fit their contexts.

Isaac pointed to possible tensions in teacher-learner relationships, suggesting that if students believe the object is to please the teacher, then their actions will be very different from those of students who believe the object is to become self-directed, competent learners.
I think the tension or the contradiction here is that kids are still trying to please the teacher. Are they identifying who they are as learners and where they are on the competency continuum or are they saying, “What do you want to hear? I'll put it down so I'll get a better grade and that’s going to shape my sense of self. If you tell me what I need to do to be strong in this competency, I can to jump through the hoops to get there.” (Isaac, 4b, 26)

This same tension applied to educators. If their sense of identity and their notions of success were tied to covering the content standards of the curriculum or to evaluation requirements, then the object of their activity would look very different from a process focused on exploring and expanding competencies and understandings.

Participants considered how to mitigate power differentials so learners could try new ideas from a competencies perspective. Isaac reflected on his struggle to adjust his intervention pace to the pace of his colleagues and his students.

The struggle I see with educational leaders working with other educators is allowing that change process to take place. We want to see change today. As we’re moving into this new curriculum, we need to say, “It’s okay to feel uncomfortable; it is okay for it to take time.” (Isaac, 1.12)

Gordon also reflected on pace by suggesting that leaders “adjust the size of their big steps to balance them with learners’ comfort levels around the changes” (2.24). Isaac’s impatience with the pace of change and Gordon’s efforts to adjust his pace were examples of how participants navigated transformations. As participants located the tensions they were encountering, they also questioned how to mediate those tensions to activate what they saw as better possibilities for expanding learning.

Vygotsky (1978) described mediation as central to social formation, making higher levels of potential development possible in learners’ zones of proximal development “under adult guidance or in collaboration with more capable peers” (p. 86).
Participants realized they were often in the role of “more capable peers,” even when they did not feel completely comfortable in this role.

Bridget observed the discomfort educators were feeling with trying new ways to expand students’ learning experiences with the new curriculum.

We have to show teachers this is not as hard as they believe it to be… Find somebody on your staff who is doing an amazing job and make an opportunity for that person who is not quite there yet to actually see it in action or get support from that other teacher… to have an experience… I have seen where teachers are afraid or think it will be too hard or their beliefs are not there yet and when that teacher gets to be part of an experience… suddenly, the light goes on. (Bridget, 1.19-20)

Encouraging colleagues to act as mentors was one way to mediate peers’ discomfort with venturing into the next-step learning experiences of their zones of proximal development.

Katz and Dack (2013) emphasized the centrality of identifying needs emerging from problems in present practices to determine which tools or strategies might best meet those needs. Janice demonstrated this by giving an example of how she was asking questions when supporting colleagues with examining their practices.

In this process, when we are working with our staffs, we are not going to say, “Was it a good lesson? Was it a bad lesson?” Instead, “What worked well within the lesson? What didn’t work well?” As we go through this transition, it is narrowing even into those small pieces. (Janice, 3.27)

The premise for collaboratively identifying problems in existing practices is that, as multiple voices identify the problem, from the intersections of these perspectives new ideas can take shape. This was the basis of the expansive learning framework applied in formative intervention methodologies like Engeström’s Change Lab and Daniels’ Developmental Work Research (Daniels, 2008a; Engeström, 2010, 2011; Engeström et al., 2014). Emergent ideas, if adopted by members in an activity system, can lead to transformative changes in practice.
Katz and Dack (2013) insisted that mediating collaborative practice was not about coming together in “a culture of superficial niceness” (p. 66); the point is to challenge educators to make their preconceived beliefs, opinions, and ideas explicit. Dana agreed, offering an example about giving presentations to unpack the term “reconciliation.” She shared that she intentionally challenged people’s thinking by helping them recognize when they were feeling uncomfortable, and encouraging them to explore that discomfort in a positive way.

If anything I say makes you feel uncomfortable or if you have an adverse reaction to it, that’s good. I am doing my job because that is bumping up against your comfort zone. Instead of pulling away and going, “I don’t like this,” ask, “What is it about this that bothers me?” It is challenging your thinking, it is shaking up your worldview, and it is uncomfortable; but growth is uncomfortable. So embrace it and go, “Wow. That made me really angry.” Good! Why? What was it about that? (Dana, 6.27)

By exploring zones of discomfort, Dana encouraged educators to examine perceived obstacles. Aboriginal understandings and reconciliation were stimulating arenas for exploring our discomfort with expanding competencies because educators were able to admit they did not feel as competent and needed support in these areas.

Ellen recognized she needed to balance the process of collectively exploring uncharted directions with educators and students.

We know there has to be a balance between collaboration and independence because no one way is ever going to work in every situation. It is always about determining which combinations and proportions are going to work best between the individual and the collective. (Ellen, 3.15)

Participants noted that collective competency required multiple opportunities to internalize learners’ experiences, even when this process was not easy. Throughout my analysis, Vygotsky’s (1978) zone of proximal development, Dweck’s (2017) growth mindset, and the Groff’s (2012) practitioner guide to the OECD principles of learning
served as reminders of what we were trying to accomplish in mediating expansive learning and collective competencies with colleagues and students.

A Need to Create Instruments that Support Learning as a Process

The *BC Education Plan* was an important formative intervention tool stimulating educators to explore learning as an ongoing process through a competencies lens.

[The *BC Education Plan*] seeks to create a more flexible and dynamic education system where students are more engaged and better prepared for their life’s journey. The key focus is personalized learning – where students have more opportunity to pursue their passions and interests – while maintaining B.C.’s high standards on foundational skills like reading, writing and numeracy.

*BC Education Plan Focus on Learning: An Update* (2015a, p. 1)

BC’s new curriculum proposed that learning be designed from the outset by engaging learners’ interests and experiences through big ideas and essential questions. This did not mean educators had to plan for every possible answer; instead, they needed to be open to exploring ideas and questions. The beauty of collaboratively tackling the double-bind of maintaining high standards for all learners while personalizing learning for each student is that diverse minds work together to create and share new solutions.

Participants were supporting educators with building their understandings of competencies as a socially constructed and mediated learning process. At all levels, but especially in the secondary grades, educators were questioning which practices to keep and which to replace as they explored the big ideas and essential questions framing each subject area. To value learning as a process, we needed instruments that allowed learners to demonstrate their diverse competencies. In this section, I explore themes emerging from participants’ expressed needs to: 1) design learning options that value differences; 2) plan for intentional inquiry; and 3) stimulate the sharing of expertise and resources.
A need to design learning options that value differences.

Sometimes the chasm separating ideals about designing options to meet the needs of all learners and the reality of classroom environments seemed overwhelming. “We try and personalize learning with big questions, but in our classrooms not all kids will engage around the big questions. When it is too big and open, we lose the kids who need structures and supports” (Karina, 4.2). In my conversations with colleagues, efforts to support the personalized learning needs of students were frustrating because there were many diverse needs in every class. “It feels like we have cracked something wide-open… What structures can support teachers? Some do not work, some need to go… deciding which ones… We haven’t had time to sit back and look at that yet” (Karina, 4.3). At first glance, my statements may appear to echo the oft-cited concerns about a lack of resources, both material and personnel-based. If educators believe they have to adapt each lesson to personalize for each learner’s needs, they are facing an impossible task.

Universal Design for Learning (UDL) (Meyer & Rose, 2005) is one instructional design model that fits well with this focus on personalizing learning, as it “reframes our understanding of learning away from the vision based on the needs of some mythical ‘average’ learner who can be counted on to experience a curriculum in a certain ‘average’ way” (Hall, Meyer, & Rose, 2012, p. 3). Participants saw UDL as a design tool that encouraged educators to plan for students in the margins from the start so activities did not have to be retrofitted for students with exceptional needs.

Isaac referred to a UDL session he had attended where Moore, the presenter, employed a bowling metaphor to explain how to effectively to reach all learners. Moore offered that expert bowlers do not aim for the headpin; they aim at the pins in the margins
to knock over all the pins. “Shelly Moore really captivated me with the headpin and the need to be teaching to the outside. That is really about planning classes to meet all of your learners” (Isaac, 2.8). UDL is a design process that encourages educators to plan learning experiences that activate networks in learners’ brains by offering multiple means of: representation (ways to access and present information), action (ways to express what they know) and engagement (ways to generate and sustain motivation) (Hall et al., 2012).

Considering Universal Design for Learning during planning does not suggest that educators add endless new practices to their existing toolkits, but, rather, that they expand learners’ competencies by accessing their own toolkits. I shared my UDL experience with Special Education Technology-BC (SET-BC), in which I consider UDL as a means to consider variance as the norm and not the exception during planning.

[UDL] is really about how learners can access information in different ways and share information back to us. If a student can come to me and say, “I can't do it that way but if you allow me to do it this way and access these resources, then I can show you what I know…” We have to be able to get to that place of accepting that students have different ways of accessing information and presenting their knowledge. (Karina, 3.19-20)

Abandoning practices that are barriers to learning might be as simple as accepting alternative suggestions from students. Exploring approaches like UDL demonstrates that educators do not have to create an individualized plan for every learner.

To embed competencies in educators’ planning from the outset, Janice’s staff had set their primary collaboration goal to focus on UDL as a way to engage all learners.

[We are] getting everybody well versed in Universal Design for Learning and structuring our lessons so they are open-ended. It is changing the idea of what learning is from that rote practice to uncovering and discovering and having that self-awareness that, “This is how I learn and how I can express it this time. Next time, I’ll do something different.” (Janice, 3b.11)
Janice recognized that to support successful changes in school, colleagues need time to process how to meet the diverse needs of all learners through a competencies focus.

At times, participants were frustrated when some educators were unable to let go of worksheets and tasks aimed at all learners reaching the same goal in the same manner. Isaac found it challenging to encourage peers to abandon these one-size-fits-all practices.

Why do we do what we do? We are holding onto this toolbox of tools, strategies, practices, and we do not need to take all the tools here. We can take some of them out and lighten the load. That is what [Faye was] saying, “Look, can we just stop doing this now?” (Isaac, 1.23)

As we expanded our understanding of competencies, we recognized that our colleagues also needed time to focus on competencies in their contexts in order to shift their practices.

At a district implementation day, educators watched a short video of local students completing the phrase: “I learn best when…” The students’ statements presented their honest, divergent perspectives in answer to the prompt. Educators at the session were asked to consider this statement in relation to their own learning needs, and to apply this knowledge in planning for a broader range of learning styles. Dana reflected on the district changes she was noticing in relation to planning for diversity where “individuality, cultural differences, personal strengths are being taken into consideration in building a fuller understanding of the students than before” (2b.4). In activity theory, systemic activity is often defined by the successes of small group actions toward a common goal or motive. Valuing differences and planning for options conducive to learners’ diverse needs increases the possibility that school communities can expand their collective competencies.
A need to plan for intentional inquiry.

As we examined other ways to be more intentional about planning for learning options and differences, Carol commented on the need to really understand and question our learning intentions so that we can be open to adapting and changing with learners.

How many times do we say, “We are doing this already”? But that doesn’t mean anything if we don’t understand the intention or if we don’t know why. It is important to be cognizant we may be doing it already because it is rote, not because it is intentional or meaningful or that we are expecting some specific result. (Carol, 1.22)

Carol questioned whether we were actually improving learner engagement. Did students have a greater sense of their personal and social identity? Were they able to communicate their deeper understandings both critically and creatively? How would we know? Katz and Dack (2013) suggested that instead of pursuing quick answers to these kinds of questions, educators need to spend more time being genuinely curious about the rationale for their identified problems of practice, drawing on contextualized examples to view problems from multiple perspectives. Participants in this study were doing just that.

Marissa’s example of intentional planning with her colleague showed how educators were approaching curriculum planning in new ways to focus on competencies.

We started with the question about cooperation and conflict between First Peoples and Europeans. That essential question ultimately became, “How has Canada’s identity been shaped by the interactions between First Peoples and Europeans at the time of first contact?” It seemed more open-ended, but it took us a long time, in discussion with colleagues to come up with that question that guided the rest of the unit. (Marissa, 2.19)

Ellen, who had supported Marissa and her colleague with this process, pointed out how Marissa’s question changed at the design stage and during implementation with students.

[Your question] evolved and changed as you went through the unit design, too. It probably changed after you implemented it. You go through the
planning process, you go back and adjust it in the implementation process and then you go back and adjust it again. (Ellen, 2.19)

Marissa’s experience was essentially the premise of the big ideas in the new curriculum; by asking big questions, learners could expand their inquiry to incorporate their interests. Having experienced this process with a colleague, Marissa was able to model and adapt it with her students and with other colleagues. As she shared her process, she incorporated Ellen’s suggestion to consider competencies during the planning stage.

You had suggested teachers code the curricular competencies to the core competencies. If you code them, then it becomes obvious that the curricular competencies are totally linked to your core competencies. Of course, one curricular competency can be coded in many ways, communication, critical thinking, whatever… (Marissa, 3b.8)

Marissa’s observation was similar to how we initially felt the need to distinguish between core and curricular competencies. As participants became more comfortable with the language, they worried less about isolating the core from the curricular competencies. The idea that curricular competencies draw upon several core competencies speaks to the activity theory notion of boundary crossing, in that core competencies reflect real-world learning and are not bounded by disciplines. The processes participants shared with each other about how they supported colleagues with intentional planning and the big ideas of the curriculum were also examples of boundary crossing that had a ripple effect back out to schools as a result of participants’ roles, contexts and experiences.

With Janice and Carol, I reflected on how to address the needs for teachers to collaborate by deliberately building time into the schedule through preparation blocks, administrator support, and partner classes (3.13):
We made time for this by scheduling [partner] classes back-to-back in music so teachers could have an hour of collaborative time where one class was in music while I covered the other class and then we switched. By orchestrating the music schedule to align with Inquiry & Innovation time, we found opportunities for teachers to work together. (Karina, 5.13)

What we realized in scheduling for collaborative planning was that making this structural change stimulated colleagues to question other traditional structures.

One of the things our grade eight team has appreciated is having that linear time [instead of semesters]. The teachers said, “We know our kids so well.” So next year, we are working with the grade nines, getting them comfortable with working with the core competencies and all the self-assessment pieces and just learning from the grade eight team around how to do this. Then, we might be looking at… we will see if we can swing a linear grade nine program. (Janice, 3b.15)

Janice mentioned how shifting to a linear grade 8 program had teachers in grade 9 asking for a similar shift so they could explore the curriculum and competencies as a team.

Intentional scheduling opened up possibilities for educators to work together. We noticed that educators were sharing resources more frequently as a result.

During discussions about intentional planning, Carol added a surprising twist about how design spaces were supporting personalized and collaborative learning.

Our facility is really designed for sharing classes. When I watched [the rooms] get built, I just saw these massive rooms we were calling Collaboration Spaces. “We don’t need that for students!” But now it’s so deeply entrenched in our practice to use these spaces. We constantly put 60 kids together with four teachers and it works beautifully. (Carol, 3.13)

Janice added her thoughts on the school design changes as well:

What you said about the collective and the individual, we’re seeing that play out constantly. We’ve got the big groups and then they split off into the small breakout spaces. Recognizing and valuing that people are going to need different amounts of interaction is really critical. That’s something we have to carry on with the staff, knowing it is okay to go, have that reflective space on our own, and then bring things back. (Janice, 3.13-14)
Intentionally designing learning spaces and models was another instrument to influence collective collaboration and to value diverse contributions.

**A need to stimulate the sharing of expertise and resources.**

*Natsumat Tatulut*, a Hulqu’minum term that means “learning together,” is the name of our district’s professional learning committee. Like the working group for this study, the philosophy of Natsumat Tatulut is that everyone can be both a mentor and a learner, depending on the context, a view that is essential for sharing expertise and resources between individuals. Engeström (2010) suggested the most important outcome of expansive learning was agency: participants’ ability and collective will to shape their systems. He described evidence of emerging agency when participants “resisted the interventionist, explicated new possibilities or potentials, envisioned new patterns or models, and committed to or took concrete actions aimed at changing the activity” (p. 85).

Naomi recognized that her leadership role gave her an opportunity to expand collective agency by inviting colleagues to collaboratively plan around competencies.

I was able to use the Implementation Day to talk about the project and we combed through the competencies to see which competencies fit. The act of pulling it all together shaped the whole process. It made it much easier because we had it there and I just regrouped it. (Naomi, 3b.8)

By leading and planning shared professional responsibilities and resources for their school’s project-based learning initiatives, Naomi was able to support colleagues with both differentiated and collaborative learning practices.

In 2017-2018, our district experienced a surge in agency as it needed to hire 150 new teachers when the 2002 contract language regarding class-size was reinstated. These new, or recent, university graduates were in their own expansive learning cycle, busy
accessing district and union mentorship initiatives to support their integration into the district (Faye & Marissa, 5.30-31). Participants were also mentoring new teachers through their school leadership roles. This sharing of varied experiences and resources from multiple contexts and areas of expertise provided new energy in schools, as status quo practices were questioned and new ideas were offered to replace them.

The addition of so many new teachers in our district added to the collective learning experiences in schools. Dana and Ellen (3.11) remarked how the traditional power dynamics and hierarchies were shifting as a result of new teachers’ experiences with competencies and the new curriculum. By modeling their recent training in differentiated approaches, practicum students were also shifting how more experienced teachers viewed competencies. Janice was working to encourage new teachers to share their experiences while having experienced mentors support them in other areas.

To enrich their collective understandings of competencies-based approaches, Janice pointed to how educators were normalizing the sharing of resources through instant networking possibilities to support greater diversity in options for learning. “Working through our learning leaders is another way we are spreading a common message, sending it out, then bringing it back, and making that communication flow really steady and consistent” (3.13). Participants noted that providing a structure or a place to start was often all colleagues needed to begin sharing resources to support new ideas to expand learning. Carole, Faye, and Marissa (5.33) commented on how easily educators were sharing resources in multiple non-linear ways through informal and formal networking (blogs, wikis, websites, Google Apps for Education) and how students were actively contributing their networking expertise as well.
As educators became more familiar and confident with how core and curricular competencies were linked to big questions and essential inquiry questions, many were also becoming more comfortable accessing, developing, and sharing competency-focused resources with colleagues. By mediating opportunities for working together, often across school sites, participants were shaping the activity systems of their schools or professional learning groups and providing important scaffolding support through training, resources, and learning blogs for educators. As some of them also worked with provincial groups, they were able to contribute and share new provincial resources.

[The First Peoples Science document from the First Nations Educational Steering Committee (FNESC)] has the competencies woven through it, consciously… Somebody went to a lot of work, many ‘somebodies’ worked to make it. So, for me, it is finding as much as I can to make it safe and comfortable for us to explore together and to know that we do not have all the answers. (Naomi, 3b.21)

This sharing of resources was also reflected on the Ministry of Education website, Building Student Success: The New BC Curriculum (BC Ministry of Education, 2018b), where examples of students demonstrating competencies in diverse ways were posted through teacher-submitted illustrations from class projects and activities. Participants pointed out that a common confusion for educators initially looking at these profiles was a tendency to try to associate the competency stages (1-8) either with a grade level or in relation to a percentage of achievement toward a fixed outcome. This was not surprising as educators were often trying to impose their familiar assessment structures onto these new competency-based models.

Accessing and creating formative intervention tools to support learning as a process required participants to consider how they were designing, planning, and sharing expertise and resources to expand their practices with their students in creative,
meaningful, and relevant ways. In our group, we recognized the learner-focused competencies of the new curriculum challenged us to view our teaching practices from new angles; recognizing how we aligned our practices with our beliefs and understandings about competencies required us to reflect on our intentions, support structures, and interactions in working toward these visions.

A Need to Design New Models for Communicating Competencies

As participants worked to support colleagues with their questions about how to shift reporting practices to align with the Ministry guidelines, they also deepened their understandings of core competencies. In this process, Isaac suggested that even the term “assess” needs to be questioned.

When we say core competencies are to be embedded in assessment in our district, that word *assess* really creates a tension. If we took out the word, *assess* and changed the question to the ways we have students *reflect* on core competencies in our district… that changes the lens to assessment as learning. Then it is no longer about a number, it is now about students’ self-reflection. (Isaac, 4b.29)

In the final theme of this chapter, I analyze participants’ challenges with accessing and designing models to support educators with reflecting on and communicating about student learning from a competencies perspective.

Borrowing from Halbert and Kaser (2013), Ellen shared her view that assessment practices need to change so learners can graduate with dignity, purpose, and options.

You cannot change assessment practices without changing the pedagogy behind it. You cannot eliminate letter grades or numbers from the top of a worksheet that does not lend itself to being able to have conversation and feedback and all that happens during the process of learning. When you have hands-on challenges that are constructivist-based and students engaged in that process, they do not care what that letter grade is at the end. They are proud of themselves intrinsically for how it felt, how much they learned, and how much they can explain. (Ellen, 2.27-28)
Participants in this study described viewing competencies as a means to encourage a paradigm shift away from traditional assessment practices toward intrinsic views of learning. The sub-themes I explore emerge from participants’ expressed needs to: 1) challenge assumptions about assessment practices; 2) include learner’s reflections about their competencies; and 3) design new competency assessment models.

**A need to challenge assumptions about assessment practices.**

Supporting students with defining their learner identity and their ongoing learning process through a focus on competencies is a huge shift away from defining the value of student learning through letter grades. Knowing this vision was not our current reality but wanting to move toward it, participants shared their efforts to challenge colleagues’ beliefs about assessment practices by asking *why*.

It always come down to the ‘*why*’. Is the ‘*why*’ of our [reading assessments] to collect data, process it, and put something out at the end? No actually, it is not. Is the process to look at learners both holistically and individually to see if we need to provide tier two interventions or something like that? Yes, that is more in line. (Henry, 6.8)

Henry recognized that if assessment conversations remained fixated on scores, we will not be leaving the deeply entrenched grades-based paradigm any time soon.

Separating the competencies continuum from summative grades offers an opportunity to challenge assumptions and intentions relating to assessment practices.

In this discussion around competencies we have this set of values as educators around how students learn best: differentiation, creating different access points to get into the learning and then we seem to, for some reason, ignore that. We have had *hundreds* of hours of conversations around assessment practices and what is best for kids and for their learning. (Henry, 6.7)
Henry was encouraged that when he challenged colleagues to reflect on their most meaningful learning experiences, and then asked them to consider how they were assessing those experiences, he could see them shift their thinking.

Faye recognized colleagues need support with shifting assessment models, but also pointed to practices like “one-size-fits-all workbooks” that need to stop.

For some teachers, we actually make the sheet and we walk them through it and others, we give them an idea and they run with it. We have to meet them wherever they are at and that looks different for every teacher. Once we get that going, we have to say, “Now, stop doing…” Some bad practices have to stop. That is where I find the biggest hurdle. (Faye, 1.19)

Faye was frustrated when some teachers assessed a certain way only because they had always done it that way.

“Why are you benchmarking your kids every month [recording reading levels]? Is it helping you? Is it helping them?” When we meet teachers, we say, “Your plate is just so full. This must seem overwhelming. Why are you doing it? What does it give you?” (Faye, 1.24)

We need to consider how a focus on competencies might shift our existing assessment practices.

In the absence of systemic support for alternate communication formats, educators continue to use traditional grading systems, even when confronted with evidence to show how grades and percentages are not accurate representations of growth; thus, these grading systems are often detrimental to encouraging learners to expand their experiences (Dweck, 2017). This practice was described by Katz and Dack (2013) as omission bias and they suggested that if educators do nothing to change their structures and assessment models around this practice, then educators are collectively complicit in impeding learning.
Rose (2017) confronted this same problem in his book, *The End of Average*, describing how Bloom had conducted a study demonstrating how more than 90% of students in a self-paced learning environment were able to succeed, in sharp contrast to the traditional bell curve of success rates based on equal instructional time for all learners. When confronted with this double bind of the punitive impact of our current models of fixed instructional time and graded evaluations, participants in our working group knew changes were needed but struggled with how to do this.

The *unlearn* thing really stuck with me. We know there are practices that we have all done that are not good for kids. Some of those things need to be unlearned. I remember doing the same thing, “If you don’t behave, then I’m taking away your PE class,” but I would not say, “If you don't get your PE done, you're not going to get to do math later.” Those are some of the things I have to unlearn. (Isaac, 1.11-12)

Participants recognized it took courage, support, and sustained effort to shift from familiar but ineffective practices toward experiments aimed at replacing these practices.

At a district learning session, educators reflected on learning from fixed and growth mindset perspectives by considering what it means to become competent, and whether percentage scores were an accurate reflection of competencies (see Figure 9).

Two students take a course in parachute packing. At the end of each week, they packed five parachutes and they were tested for effectiveness. If the parachute was packed in such a way that it would fail to open when the string was pulled, the student was given 0. If it opened, the student was given a 1. Marks were reported like this…

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student A</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Student B</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

Student A’s accuracy was the same at the end as it was in the beginning; 1 out of every five parachutes packed still won’t open. Student B started off really poorly but learned over time and consistently packed every parachute accurately in the last two weeks of the course. But if all you were given was the average percentage, who would you have chosen to pack your parachute? (Adapted from the blog, *Teaching on Purpose*)

*Figure 9. Who is Packing Your Parachute?*
If some learners work diligently to become more competent, and others are satisfied with their achievement from the start because of their mark, how are traditional practices of assigning scores and percentages colliding with our beliefs about lifelong learning? How did we need to shift practices to focus on a learning continuum?

**A need to include learners’ reflections about their competencies.**

Isaac questioned whether the group’s ideals about competencies were really different from letter grades by pointing out how students already compared their work against a rubric or a clothesline of “beginning” to “outstanding” exemplars.

One of the assessment strategies is the clothesline where we put all the work up. Well, whether we have a letter grade or not, whether we have descriptive feedback or not, when I am taking my artwork and I am at the [quality] end of the clothesline and I am moving down… and I am at the end… It is no different from the letter grade of 1 out of 10. (Isaac, 2.28)

Ellen argued the intrinsic difference was that the learner was the one assessing the work. By comparing personal work to a variety of exemplars, instead of receiving a defining grade, the learner had options for revising the work or to consider for the next project.

Marissa offered the example of how the learning journal assignment she used in her class gave students an opportunity to reflect on their learning process over time. “I will look back through their journal with them and look where they were in September. Seeing their personal growth in terms of writing, doing that periodically makes it [more meaningful]” (2.28). Participants explored tensions between how they had learned in the past, how they reflected on their learning, and how they assessed learning. There were different views, ideals, and values within our group, and certainly among educators across the district.
Faye offered her understanding of descriptive feedback in primary. Her tone of voice and emotions showed her frustration with learners’ shifting views in later grades.

Now, competencies are a shift in that we have to ask the child, “What did you learn?” and not, “How did you do?” which is different. It is really upsetting to hear older kids say, “Just ask me how I did. Don’t ask me what I learned because I just dumped it on a piece of paper and threw it out on my way out of class.” Whereas little people, they are still okay with telling you what they have learned. (Faye, 2.34)

Isaac described how assessment practices can support or detract from learning.

What’s amazing is that I sit in on our weekly SBT [School-Based Team] meetings and I have yet to see any of our teachers come to SBT meetings with their grade book. There is the irony. We feel like we need it to justify everything. When they come to SBT, most of them come with virtually nothing and they can set the whole table, complete evidence of learning, where the kids are at, where they are struggling, what their next steps are, what helps them, and what specific help they need. (Isaac, 6.7)

Isaac questioned how to support the use of data to expand learners’ competencies. If our aim is to engage learners in communicating their competencies through their personal, social, and intellectual identities, what can we do to support them with this?

Bridget suggested we needed to focus on practices that encourage students to reflect on and communicate their competencies so their views form part of the data.

The ultimate vision would be that all staff and students have clarity around the core and curricular competencies… Then, learners could assess where they are, where they want to go, and have the skills and abilities to plan in order to empower themselves to move ahead and that we are the facilitators of that… that would be the ultimate dream. (Bridget, 1.7)

Participants shared some of their colleagues’ metaphors for defining and communicating stages of competencies with learners and parents. In my school, learners explored their competencies with school-wide expectations by associating their actions with a bird emerging from its shell, developing with support from parents and adults, proficiently flying solo, and extending competencies by exploring other environments.
Learning to ride a bicycle was another metaphor to describe competencies. This metaphor originated from a poster about successful learner traits.

If you think about riding a bicycle… on the competencies scale, when you first start out, “I'm at the beginning stage.” Then, “I’m at the developing stage because I still need lots of support.” “Hey, I can actually apply what I know and it is working!” “Now, I’m off mountain biking!” It is that piece of how “extending” really allows you to explore different places. It was a great analogy. (Karina, 5.19)

By sharing these metaphors of the competency continuum, our group was expanding our ability to explore this concept with colleagues and students using accessible terminology.

Henry was eager to support colleagues by encouraging questioning and reflection as an integral part of the learning process. He provided multiple examples for this group.

What would an answer look like for this? One of the great things to try is to do two of the same, that is, “Let’s take your first reflection without any guidance from the start of the year and reflect on your learning.” Then, at different points of time over the year say, “Think about communication competency. How did we use it to accomplish this?” (Henry, 6.21)

Through this working group process, participants had opportunities to come together to share their challenges and their breakthroughs, and to explore possible solutions.

They start building and, at the end, it is their portfolio for their core competencies… They are able to see the growth and the change and identify what they need to improve. So there has to be an intention. Not that we have the perfect reflections, unless we try to craft one: What is in this reflection? What does that look like? How could you incorporate that whole piece? I think that would be very intriguing to see. (Henry, 6.21)

The moment Henry verbalized his idea of crafting a “perfect reflection,” he realized he could create a potential model for supporting colleagues. Occasionally the participant sharing a concern was also the one finding a new solution. At other times, one participant’s suggestion stimulated a chain reaction, inspiring new options to try.
Encouraging colleagues and students to reflect on their learning stimulated participants to design assessment instruments that aligned with their inquiry practices.

We did an egg-drop challenge. The kids were so proud of what they did and they did not compare it to other kids… We would have them reflect on their learning and their processes and there was not the comparison. The more we do hands-on, project-based, inquiry activities, and get kids involved in that… there is less comparison. (Marissa, 2.27)

When we are looking at core competencies, it is that shift of how we do not need to teach the content as much anymore… What we really need to do is teach the reflection piece. If we invested our time into how we capture student learning and teach kids how to reflect thoughtfully… I think that is our next frontier. That is going to be challenging. What does it mean to me? How am I involved in this? (Isaac, 6.19)

Participants realized that experimenting with new instruments helped learners reflect on their learning from a “next-steps” perspective they could share with others.

During our discussion about how educators were designing diverse competency self-assessments for students, Carol suggested educators need to complete their own competency assessments, not from a judgmental perspective but as a recognition of their strengths and needs or stretches:

How many times as teachers do we go home and say, “That was a great lesson! That went really well!” You feel the energy and have adrenaline rushing because the kids took it all in and it went really well. That is when we need to fill out one of those [core competency assessments]. I am able to do this. I did this really well. I was able to… (Carol, 3.27)

Henry added to Carol’s idea, noting that both students and educators thrive given opportunities to engage more deeply with processes for reflecting on competencies.

Now we have the process, we can look at it in more depth. What does this really look like and how can we engage kids in this? That is one of the biggest questions I notice coming out of this. How do you get the kids to engage with these core competencies and reflect on them? I not sure that some adults can reflect on some of these and we’re asking kids to build that capacity. I think there is excitement and interest. We are all terribly tired. There is movement; we just have a long way to go yet. (Henry, 6.2)
Our group then focused on next-step actions for inviting educators to reflect on their competencies by expanding on the same models we were developing with students. Henry’s comment that we still have a long way to go was important. Of all the areas discussed, aligning the instruments of our assessment practices to focus on competencies was the most contentious, but also the area where the shifts seemed to be the greatest.

**A need to design new competency assessment models.**

Several participants in this study had helped to create the new district-wide reporting models known as *Ongoing Communication of Student Learning* and *Student Competency Scales* (NLPS, 2018). By replacing the previous reporting format with these new instruments that aligned with the competencies focus of the new curriculum, educators were immediately thrust into actively co-constructiong their understandings of the Ministry’s new reporting terminology and the District’s new instruments for reporting on learning. Even though this put more pressure on participants in our working group, we welcomed the opportunity to have deeper conversations with colleagues about assessment practices while providing support with the new communication and reporting models.

I was so excited when we did not have to give letter grades this year, especially as the format has changed, too. [Learners] see the comments before they see the sliding scale. Before, kids would look and see their letter grade and rather than think, “Oh, I must have worked really hard to get that” or “I worked hard enough,” they would make a judgment, “I’m good in math” or “I’m not good in math.” (Marissa, 2.26)

Instead of measuring progress in percentages or letter grades, educators and learners were reflecting on competencies through descriptive feedback and ongoing communications.

I echoed Marissa’s excitement over the district’s support of ungraded reporting of curricular competencies in kindergarten through to grade 9 and the language being used.
I love the continuum language we have in our district. You are *beginning* your journey, you are *developing*, you are *applying*, and you are *extending*. Now, if teachers could sit back and say, “I am beginning this journey or I am developing my skills, but I still need support.” (Karina, 3b.16)

Originally, the *Student Competency Scales* were designed as a 4-point grid for reporting to parents on each subject area. When educators asked to show how students were transitioning between stages, the model was expanded to a 7-point sliding scale.

This new reporting tool pushed colleagues to refine their understanding of the terms they were using to describe competencies in their feedback to students and parents.

Another layer I am encountering at secondary is a discussion on “What does ‘extending’ mean?” Here at this table, it means “branching out, exploring”. The conversations we have heard from staff is that “extending” means you go “faster” or a grade above or to the next level. How do we articulate to staff and help them understand it’s like a tree and it is okay to branch out and interconnect and weave? (Janice, 5.21)

The terms referenced in our new reporting instruments disrupted educators’ attempts to lay the competency continuum over their former grading schema and stimulated them to think about learning differently. This did not mean the transition between assessment systems was easy, especially for those at the secondary level working with both systems.

He is riding the bike… very well. He’s not mountain biking, but he is doing extremely well, he is doing exactly what in a grade 10 world would probably look more like 90%. However, in a grade 8-9 world, he is “applying”. What this teacher is struggling with, and I do not blame him, is going from having taught or maybe currently teaching grade 8s and 9s to having this class of grade 10s and wanting to honour the competency-based and standards-based learning systems but not being able to translate that into the grade 10 world. (Carol, 5.19-20)

Participants acknowledged this shift was confusing for educators, students, and parents.

Henry compared the competencies terminology with the former grading system to emphasize that, when students did what was expected of them, they were *applying* their competencies but not necessarily extending their abilities into other contexts.
One of the quick ways I get around it is that 100% is still “applying”. As soon as you use that, “Well then, is there a bonus?” No, there is no bonus; 100% shows that on a mastery scale you are competent. You can apply everything [you have learned] with accuracy. (Henry, 5.22)

In the past, when students earned an “A” for successful application of skill and knowledge, they had achieved what was asked of them. Dana equated this with the idea that learners “knew how to jump through the hoops because they knew how to achieve in the subjects but it had no deeper relevance for them” (5.38).

With the competency continuum, being “competent” or “proficient” did not mean learners were done; instead, the continuum encouraged learners to “extend” their competencies into new contexts or areas of interest. This subtle but important shift was aimed at encouraging learners to go beyond what was asked or expected of them and to explore how they could expand their learning experiences in ways that were personally relevant and in ways that would positively contribute to the experiences of others.

A lot of it comes down to personal relevance. Those students that stuck with the sciences… they were able to see there was relevance to who they were individually but also culturally. Once they get to university, they are able to see all of these other fields of study where their knowledge is highly relevant. But sometimes they don’t know about that in high school where science is chemistry, physics, biology… (Dana, 5.39)

Dana saw this as a way to create opportunities for learners to share personally relevant connections with their present contexts so they would be open to future-oriented options.

From the perspective of relevance, competencies are not simply a toolkit of skills to be transferred from one context to the next. Learners, even as professionals, need to continue to develop their competencies “so that they are able to react to and anticipate future developments in their work and outside” (Biemans et al., 2004, p. 524). Educators
need to experience this shift to more collaborative, reflective, and descriptive feedback in their own learning so they can model it with their students.

**Secondary Needs: Mediating Shifts from Ideals to Actions**

Our group’s efforts to mediate shifts in educational practices from ideals to actions were challenged by the double-binds we were encountering between existing practices and new ideals. It was easy to discuss primary needs in relation to ideals for change, but the secondary needs emerging from efforts to shift practices toward ideals were more challenging. Participants in this study accessed and created instruments to support colleagues and students with expanding their conceptual understandings of competencies in the context of their practices. Through our working group discussions, we shared our experiences mediating these shifts by validating collaborative practices, accessing and creating instruments to support what we were trying to accomplish, and then collaboratively designing new systemic models for assessments that supported ongoing learning through core and curricular competencies (see Table 9).

What we realized in this process was how assessment of learning had shifted to an ongoing reflection and communication about and for learning. While it seems such a simple thing to shift the word “of” with the words “about” and “for”, there is nothing simple about the mindset shift required in this process. Educators across the province working with the new curriculum needed to unpack not only the content and the intentions of the new curriculum, but also how the broad scope and the focus on competencies could be explored and implemented in local contexts. As our working group supported colleagues and students in our district, we accessed and created
instruments to reflect and address the practical shifts and actions in response to the secondary needs that emerged from our changing local visions for learning.

Table 9

*Secondary Needs: Mediating Shifts from Ideals to Actions*

<table>
<thead>
<tr>
<th>What mediating instruments did we, as educational leaders, need to access and create to support colleagues in co-constructing their practical understandings of competencies?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Need to Engage in Collaborative Practices</td>
</tr>
<tr>
<td>These themes emerged from participants’ expressed needs to…</td>
</tr>
<tr>
<td>- Expand collective competencies - Build trust and acknowledge vulnerability - Mediate tensions and intentions</td>
</tr>
</tbody>
</table>

Engeström’s (2010) cycle of expansive learning illustrates how systemic contradictions force us to consider new models and practices. Educators in this district had taken brave steps to create new models in response to their needs emerging from a desire for change. Participants focused their change efforts on collaboration, personalized learning supports, and reflective communication of learning. Experimenting with new models, participants encountered tensions between past practices, current contexts, and intentions for the future. As participants worked with colleagues to integrate new models into our systemic practices and as our system adjusted, other community systems interacting with our district exposed new areas for our group to consider. In Chapter 8, I focus on the tertiary needs emerging from participants’ efforts to work through resistance from students, colleagues, parents, and community partners to expand collective community understandings of the shifting practices in teaching, learning, and assessment.
Chapter 8 Exploring Contextual Resistance with Communities

In this chapter, I focus on my third research question: “How are educational leaders working with contradictions and resistance from local learning communities in co-construction of understandings of competencies?” Referencing the tertiary or resistance state of Engeström’s (2010) expansive learning cycle to inform my analysis, I examine the needs emerging as participants expanded the ideals and practices of a K-9 competencies focus to the contexts of grade 10 to 12 educators, students, and parents, post-secondary educators, and other community partners involved with local schools.

Dana commented that “we are so immersed on the inside and the [competencies] are becoming part of our working language.” She went on to question, “How much of this translates out beyond our schools and into homes and even further into community?” (5.37), emphasizing that, as leaders, we need to hear from our broader communities about their perspectives on what we are doing in schools. As the curriculum changes rippled outwards to involve secondary and post-secondary communities and other community partners, participants were noticing emerging areas of friction to be negotiated. Working through diverse contexts in this change process exposed tertiary needs for expanding participants’ understandings and those of the broader community.

From this perspective, encountering resistance and contradictions was a means to stimulate transformative changes, expand learner agency, and potentially open new, not-yet-considered possibilities. As part of the expansive learning cycle, Engeström and Sannino (2010) suggested how experimenting with contradicting perspectives of a new concept or model helps “to fully grasp its dynamics, potentials and limitations” (p. 7). In their later work with Virkkunen (2014), they described how participants involved in
formative intervention work “commonly take over the process at some point and generate deviations from the interventionist’s intentions” (p. 123). In my study, as participants worked to bring about systemic changes through their interactions with community partners’ diverse perspectives and contexts, I could see examples of what Engeström, Sannino, and Virkkunen (2014) described as transformative agency that “goes beyond the individual as it seeks possibilities for collective change efforts” (p. 124).

For example, when some participants shared their experiences with the Aboriginal Equity Scan, they commented how educators and community partner groups were considering the purposes and value of achievement data. This conversation generated new questions within our group.

Maybe it is not about closing the achievement gap [between Indigenous students and other students]. [Graduation is measured as] a six-year completion rate, but is it truly reflective of a meaningful educational experience where Aboriginal knowledge and understandings have been an integral part of the courses and where options for Aboriginal content have been made available? We want to qualify it so it is a reflection of meaningful achievement. (Dana, 6.5)

Dana’s questions pushed us to consider our relationships with communities from new angles as we looked at examples of contradictions between past approaches and current intentions. Was a 6-year completion rate a meaningful reflection of achievement?

Recognizing that participants’ interactions with communities potentially impact our educational ecosystem beyond the walls of our classrooms and schools, I explore three key themes of how participants worked with resistance emerging from interactions with community partners, namely: 1) a need to include voices from intersecting communities; 2) a need to expand assessment paths and options into communities; and 3) a need to assume collective responsibility for competencies.
A Need to Include Voices from Intersecting Communities

In my formative intervention researcher role, I encouraged participants to consider how working with resistance from communities might offer new perspectives. Alternatively, if these perspectives are ignored, the disengaged or silenced voices often work as a counter-current against change efforts. Negotiating contradicting perspectives from colleagues, students, parents, and community partners, though not always easy, enriched our working group’s understandings of change efforts in education.

Essentially, our group’s expansive learning cycle was being supplemented by a series of smaller learning cycles as the various levels (primary, intermediate, and secondary) worked through contradictions to collectively shape communities’ co-constructed understandings of competencies. Participants were motivated to understand curriculum changes and competencies because they needed to support educators, students, and families. However, as they worked with different levels in K-12 and in different contexts, their models had to be adjusted to suit the emerging needs of their communities.

The learning communities beyond our K-9 classrooms, including the graduation years’ programs, families, and community partners also needed time to formulate their understandings of the changes. In the OECD research on the nature of learning, Schneider and Stern (2010) described how “people generally try to make sense of new information by linking it to their prior knowledge” (p. 73) and “different people, all with high competence in a domain, can have very different knowledge structures, depending on their personal preferences and their learning histories” (p. 76). For example, the expansive learning framework was a means to explore the tertiary tensions between
parents’ existing understandings and beliefs about schooling as rooted in their lived experiences and their attempts to understand the new focus on competencies. To engage in this collective learning process, parents and other community members needed opportunities to voice their questions and to have a sense they were being heard.

At the outset, Gordon commented that colleagues and students often felt compelled to resist change because change made them feel uncomfortable.

So, we are the group that is part of this interview. Are people who are resisting or people who are complaining part of it or do we bring our perspective and what we have heard from those people? (Gordon, 1.15)

Gordon prompted a discussion about our efforts to “listen to those complaints and really try to explore them” (Karina, 1.15), rather than becoming “the placebo group” (Isaac 1.16) that only sought to please the communities with whom we were engaging.

At the time of this study, the new curriculum had not yet reached the graduation years and, as Carol described, there were still many emerging questions at these levels.

When I read this first question about parents and graduation teachers and post-secondary institutions, those are three really, different things. Parents are constantly in the thick of wanting to respond to what is happening, but more specifically, what is not happening. Graduation teachers have many questions about the future and they don't want to wait to find out; they want to question it now and when I say they, I mean me because I'm one of those teachers. And with post-secondary institutions it is… silence… we’ve heard nothing. So, that's where some of the fear and uncertainty are for parents and graduation teachers. We’re being told they're in the fold of the conversation, but I have not seen any evidence of that. (Carol, 5.1)

Like Carol, some of the participants were experiencing this uncertainty, not only from their contexts as leaders and educators but also because some were parents of students in secondary grades. Being in these multiple roles put them at the centre of Engeström’s (1987) activity theory triangle where often intense debates were occurring in schools and in other arenas. I equated Carol’s description of the silence of post-secondary institutions
with the same silence I had observed initially from secondary educators, like the calm before a storm as the systemic changes moved through the grades of our system and outward into the contexts of our communities.

Therefore, in this first theme, I focus on participants’ efforts to include voices from communities intersecting with our schools. As the needs emerging from different contexts differ, I group them as: 1) a need to examine resistance from secondary colleagues and students, 2) a need to expand learning conversations with parents, and 3) a need to invite community partners to add their voices.

**A need to examine resistance from secondary colleagues and students.**

One of the benefits of participants’ district-wide presence was that their roles helped reveal some of the diverse contexts of communities interacting with our K-12 learning continuum. At the time of this study, the new curriculum was just beginning to move into the secondary years, and participants working with secondary educators were able to bring forward examples of tensions and resistance from their communities as they straddled both the old and the new curriculum, as well as assessment models and practices.

Carol shared her views that the district’s formative interventions were changing the culture of schools and that secondary educators were leaning more on each other for planning (3.12). Yet, Ellen pointed out that the voices of educators who preferred to work alone or who had not found compatible colleagues to work with also need to be heard.

*I love* working collaboratively, but *I hate* working collaboratively when it is unproductive. There are times that it's much more productive to be independent and come back to the collaborative table and do it that way and then there are times where you get stuck and you need the collective to jump start. It has to be this balance in what works. (Ellen, 3.15)
As secondary colleagues were adjusting to changing professional relationships by relying more on each other to understand the new curriculum and the concept of competencies in their contexts, for many this meant a need to negotiate new working relationships.

Isaac suggested that when dissenting voices were not valued, not considering these voices represented a loss to the learning community.

In some places, it is just thriving and people feel supported and really valued. Other places might be more fear-based where they might be feeling really micromanaged or like they don't have a voice in what's happening. Those are really stressful situations for people. (Isaac, 4.14)

For educators to engage in this demanding and challenging change process, they needed to feel valued and supported in their professional relationships so they could devote their energy to expanding some of the collective competencies of their learning communities.

Dana recounted a conversation with a colleague where he brought forward his sentiments that his competencies were no longer valued in his present context.

Sometimes it gets to the point where it creates such a feeling of dissatisfaction that people leave… All of us can experience that feeling when it gets to the point where it is like, “I can't do this anymore.” When it is so bad for your own personal well-being that you leave it entirely. Whenever that happens, it is a loss. So it took a lot of courage for that individual to say, “Hey, I just have to tell you…” I have a feeling he would have quietly removed his name… That is what happens; people do not feel safe to articulate when things are not going well. (Dana, 4.13)

As a group, we examined how, if educators feel their competencies no longer fit with the dominant values of the collective, then, rather than voice their ideas, these adults might simply shut down or leave the system. How can the district build in systemic practices that are open to exploring resistance as a form of agency where all learners felt their views were at least considered?
As our group explored resistance through students’ and colleagues’ voices around the curriculum implementation, Carol brought forward an observation that students at the forefront of changes in the secondary grades need to have their voices considered. “We need to be very aware of the fact that our grade nines [in 2017-2018] are being hit with everything for the first time” (Carol, 3.2). In 2016-2017, this cohort had experimented with the new K-9 curriculum in grade 8, then the new reporting measures in grade 9, and they would also be the first to experiment with the new graduation curriculum in grades 10-12. Janice wondered what these students were thinking about these major changes, and whether it was something they valued or even wanted to be a part of (3.7). Carol suggested that the district had done parent and teacher surveys; perhaps it was time to survey this cohort (3.7) so these students could have a sense of agency in the change process and so their perceptions could inform next-step actions around learning practices.

In September 2016, there had been a district-wide grade 7-12 student forum on new assessment practices. One student, speaking on behalf of her peers, pointed out that students’ voices were not all heard or represented by this initiative.

That teenager had the courage to stand up and say, “Look who is in this room. You were chosen to come here because you could miss a day and you could get caught up again. What about the people who are not in this room? We are not representative of every high school student or every grade 7 student in this district. Who is speaking for them?” (Karina, 2.27)

Student representatives returned to their schools to share what they had heard and to ask their peers to complete a survey so their voices could contribute to the process.

Isaac and Marissa reflected on how some educators resisted change because they were overwhelmed by some of the challenging socio-economic realities affecting their students’ ability to focus on and relate to their learning context.
Educators are saying, “What is our real job here?” Because there is so much more in that invisible knapsack (or clearly visible knapsack) that kids are bringing in every day. It takes us back to that moral purpose. Many teachers are questioning this because of the struggles of our schools on a day-to-day basis. When we layer on the new curriculum, it’s like, “Holy cow! I’m just keeping my head above water!” (Isaac, 1.16)

Aspects like poverty, mental health, complex situations, and the volume of educators’ workloads were just some of the concerns participants observed in their learning contexts. Sometimes, like with the student forum, it was possible to identify the exact origins of a stimulus. Other shifts were more difficult to articulate because they had been evolving over a long period of time. Engeström, Sannino, and Virkkunen (2014) explained how historically evolving tensions collided to stimulate transformations in practices. When these tensions were viewed as hurdles to overcome, they stimulated systemic change.

**A need to expand learning conversations with parents.**

With the double stimulus of the new curriculum and the new assessment and reporting practices, parents were feeling confused and needed opportunities to understand how their roles were shifting as they moved through the K-12 learning journey attempting to support their child. Ellen was noticing:

> Everyone's all over the map. Parents I have talked to are saying, “I don’t know where I am and I don't know where my child is.” That is because of the experience they are having where maybe the practice is not there yet or the parent or the student is not getting enough information. (Ellen, 3.9)

Dana had observed that competencies were becoming “common language for students, who had to be the translators of these changes to the people in their lives” (3.10).

> From their personal experiences, participants understood the importance of designing clear communication models and language so students would be able to use these in their learning conversations to help parents feel competent, too.
My husband asked, “Applying? I don't even know what that means.” My son replied, “Well, I learned everything I was supposed to learn.” So it is about the newsletter going home from the teacher and the teacher using the language with the kids and then the kids making sure they know it to be able to explain it to their parents. (Faye, 5.20)

Faye expanded on her comment by explaining that even though the district provided printed information to parents about the new reporting formats, parents looked to their child’s teachers for practical examples to bridge the gap between their lived experiences with schooling and the new models their children were sharing with them.

Helping students to explain their competencies to their parents was one way educators could extend their classroom reflection practices. Henry described how he had modeled this shift during parent-teacher conferences. Instead of the traditional meeting where the teacher talked to parents about the student, he invited students to present their learning so he could support students with their learning conversations. This is not a new practice. Many primary educators have hosted “Celebrations of Learning” and at intermediate grades, these demonstrations of learning might have occurred as fairs like an entrepreneur or science fair. Henry adapted existing practices with students to a parent-focused format.

In another district-wide initiative focused on expanding communications with parents, educators were experimenting with FreshGrade, an online digital portfolio where learners and teachers can post multi-media learning samples and comments for parents to view. While this could potentially be a useful tool for communicating with parents, Isaac wondered whether adding this to teachers’ workload was effectively improving meaningful interactions with parents.

I do not see the value-add in that [FreshGrade] yet, because most of the work I will send home is process/product-based with a rubric, with their
learning right there. [Students] can reflect on it after they have pre-assessed. They can write their own reflection on [the rubric]. So I'm not sure the photograph or the video piece will be a value add or not… except maybe when they talk about their reflection. (Isaac, 4b.13)

Isaac mentioned that he preferred Google Classroom as a digital collaboration platform to post assignments that students could work on individually or collaboratively from home or school.

So while I am not assigning homework, I am saying to parents, “Your homework task, if you want to stay connected, is to sit beside them and look at the things I’ve asked them to do in the class… write a persuasive paragraph… reflect on our novel study... do some math work or solve a problem or upload a video or… This is what your kid is learning and you’ve got this chronological record…” (Isaac, 4b.14-15)

Instead of adding another task to his workload, he saw Google Classroom as an ongoing communication tool parents could access with their child.

I had noticed initial resistance from my staff with online communication tools. As a result, I encouraged them to consider how to tweak their current reporting systems to communicate expanding competencies (4b.14). I pointed out that FreshGrade was a multi-media version of the scrapbooks and folders of student work teachers often used as learning portfolios. In his work with educators, Henry (5.25) emphasized that learning portfolios were not simply “containers” of students’ work. These intentional demonstrations of learning, if used purposefully, could support students and adults with personalizing, communicating, and reflecting on their next steps to expand their competencies.

For learners to communicate their progress to others along a competencies continuum, they required opportunities to reflect and to express and receive feedback. In our discussions, we focused on how educators’ descriptive feedback models were leading
students to expand their comments (Gordon, Karina, 3.8-3.9). If we were asking students to reflect and self-assess their progress, we needed to model how to do this. In response to educators’ comments about their disappointment with the “thin” self-assessment reflections they were receiving, Henry suggested:

As they’re in this reflective cycle of learning, the grade 8s are going to find their space and begin really getting this. It just takes time and there has to be permission to say, “That’s a pretty thin answer.” If they’ve never done it before, it’s going to be hard. (Henry, 6.19)

As participants pondered how to enrich students’ self-reflection comments, they noted the context and purposes for these reflection instruments would shape their perceived value as authentic representations of student learning. If we were looking for rich descriptions, I questioned whether we were designing learning experiences rich enough to motivate students to reflect more deeply about their expanding competencies. I also wondered how we could better involve parents in these reflections.

A need to invite community partners to add their voices.

In the past, curriculum changes had been largely classroom focused. In contrast, the recent changes seemed to require educators to forge much stronger relationships with families and community partners as co-learners and co-mentors in the change process.

Supporting learners involved maintaining ongoing communication about competencies, not only with students and families, but also with other partner groups interacting with the school communities. Dana commented on some of the intersections between her personal, professional, and cultural contexts and her communities.

I feel like I have a lot on my mind right now and that this conversation is relevant to it. We have this big meeting coming up for the Aboriginal Equity Scan and, just hearing what you are saying, I am jotting things down that tie into this work. There is the vision and there is the reality. If we’re truly moving towards reconciliation or equitable practices and
collective ownership, theoretically they're all beautiful things. But where are we at in terms of the reality of how those things are happening or not happening? (Dana, 5.37)

Dana noted how one of the questions from the Ministry for the Equity Scan was, “What are the institutional stories out there?” As Dana suggested, to hear the stories we need to be intentional about how we were creating safe spaces for partner groups to share their stories. Some of the contradictions we were noticing in our learning communities were linked to feelings that some cultural and historical stories were being included and others ignored or excluded from the institutional stories shaping our understanding.

For example, in French immersion, educators were feeling that unless they advocated for their voice to be heard, it was assumed that implementation supports available in English were sufficient. Despite increasing student enrolment in immersion, there was a concern that immersion educators had to translate district documents for their contexts, create assessment models, and advocate for collaboration spaces so they could address the challenges of their contexts. Considering minority voices would be an ongoing challenge, not because leaders intended to exclude these voices, but because those with lived experiences in these contexts needed to be the ones sharing their perspectives. The emphasis on weaving Aboriginal understandings into the curriculum opened the door to questioning how to consider other perspectives from local contexts, like the voices of learners with diverse needs, immigrants’ voices, and more.

Janice noticed other place-based contextual differences as she compared how district learning systems differed both within the province and between provinces.

It's actually really fascinating coming here. In my old district, partially because it was such a small geographical area and we were very isolated, we had a sense that, “We all learn together. It didn't matter if you were superintendent, custodian, student, parent... We were all constantly
learning together.” That broke down a lot of boundaries. It broke down a lot of fears. It created safe spaces where it didn't matter what your role was because we were all learning together. (Janice, 1.22)

The challenges of assimilating so many systems were not restricted to geographically separate communities. Many of the contradictions among our learning communities were linked to the diverse needs of community members in relation to the big ideas of the new curriculum, how students were self-assessing their learning, and how the competencies scales were used to report on learning.

Janice described how the stories from our contexts were enriching, as they included a diversity of voices from our communities.

The stories that we are teaching our children about themselves and how they understand who they personally are… that is key in terms of the transformative aspect of pedagogy; it almost needs to become explicit when we are going through our thirteen years of education, that we are helping humans to grow and to set a path forward for themselves. How and when they do that, is the journey… (Janice, 2.29)

Looking forward, secondary educators were beginning to comprehend that they also needed to begin leading change efforts by weaving conversations about the focus on competencies into their existing relationships with post-secondary institutions and with employers taking students for work experience placements. “Are there certain benchmarks we have to hit in order to do that in our society? Yeah. But, it is understanding that [the benchmark] does not create worth and value in and of itself” (Janice, 2.30). Whatever benchmarks and rites of passage we set for our measures of success in our communities, we need to understand these diverse historically and culturally situated paths in our local contexts to expand competencies, so all learners contribute meaningfully to the learning of their dynamic communities.
A Need to Expand Assessment Paths and Options into Communities

It is interesting when you look at the ecological principles, which are embedded throughout the new curriculum… You have interconnectedness, adaptations, change, energy, community, diversity… those are key principles, so why would we not embrace them in this time of shift and change… recognizing [change] is going to happen at different times, at different rates, and in different directions. (Janice, 5.36)

Janice’s reference to ecological principles picked up on a thread from an earlier exchange where we had discussed the ecologies defining our multi-faceted actions in relation to the new curriculum and assessment policies. Her observations were a reminder of the complexity of shifting to ongoing assessment and expanding the understanding of this process into learners’ broader communities.

Like other districts across BC, participants were examining the Ministry of Education’s changes to curriculum, assessment, and reporting through the diverse, situated contexts of our learning communities. Educators were experimenting with how to assess competencies in ways that aligned with their beliefs and visions for learning and with the new reporting guidelines. The ideas for expanding assessment paths and options in our district were as diverse as the communities from which they originated.

In our district, some examples for assessing competencies were related to personal and cultural identity. Other options followed a continuum approach drawing on expansive learning and growth mindset thinking, and still others questioned how success was being defined and measured. Based on the local contexts of our learning communities, participants examined the emerging needs to: 1) weave Aboriginal understandings into competencies; 2) question our markers of success; and 3) transition into graduation years and beyond.
A need to weave Aboriginal understandings into competencies.

Integrating Aboriginal knowledge and understandings throughout K to 12 was a fundamental shift in the new curriculum. This provided a valuable stimulus and context for focusing on competencies in relation to an expansive learning aim for most educators.

We have handed a substantial task to teachers, “Aboriginal knowledge and understandings are now in every subject and every grade level.” Teachers are saying, “But we don’t know anything about any of that.” Therefore, we have to help teachers realize where they are on this journey. (Dana, 2b.5)

Dana incorporated the competencies continuum and language to situate educators’ expanding awareness of Aboriginal ways of knowing. Many educators beginning this journey might feel uncertain, and participants recognized the need for structures and supports that can build contextual understandings.

By placing an emphasis on Aboriginal understandings, community partners also had to also step outside their comfort zones; many looked to participants in this group for support. Naomi suggested supporting learning communities through projects:

So a project that you can get into with your colleagues, that has some framework, that’s where we connect, not just through our academic senses as educators, but in a sort of heartfelt sense when you realize that these things are difficult and you’re sharing part of you, not just you, the educator, but you the person. (Naomi, 3b.21)

Naomi observed how participants connected competencies as manifestations of values and beliefs embedded in the contexts of their learning communities. This allowed us to consider aspects of our broader community that we had perhaps not thought about before.

Questioning how competencies were selected and defined, Dana expressed a need for a framework that would connect learning and identity with diverse views.

One of the struggles is that core competencies are addressing a very critical and important part of student learning and development of identity. But do they take into account variances in worldviews and perspectives?
Even by putting them into these different categories and reporting out on that, how congruent is this with indigenous worldviews and perspectives or is it still a Western framework? Can you ascertain the same feedback using a different construct? (Dana, 4.16)

In their exploration of holistic models of competence, Delamare Le Deist and Winterton (2005) argued for multi-dimensional, holistic frameworks that can adapt to different cultural contexts. They suggested linking cognitive competence (knowledge), functional competence (skills), and social competencies (behaviours and attitudes) with meta-competence, “an overarching input that facilitates the acquisition of output competences” (p. 40). Building on the premise of activity theory that systems are rooted in cultural and historical contexts, communities’ collective competencies, beliefs, values, and cultural practices need to be considered as an overarching input.

In Chapter 7, I described how participants had relied on metaphors to represent the competencies shift. In these early metaphors, participants referred to the cognitive and functional competencies needed for riding a bike or for a bird learning to fly. At one point, Janice had described how secondary educators felt like they were wading through a swamp. During our fourth session, Dana experimented with cultural metaphors to capture a holistic framework of competencies that she was still working to define.

Some of our schools are exploring Aboriginal education through a holistic lens like a medicine wheel... It can really depend on local cultural frameworks. What would it look like in Coast Salish territory if the framework were based on Coast Salish cultural values around the long house? Or around Métis symbols of identity like the sash or Red River carts? Those can all be metaphors for the same thing. (Dana, 4.16)

In Dana’s metaphors, she was attempting to weave the concept of competencies into communities’ cultural contexts to better connect with their historical roots and values. As
participants explored cultural contexts influencing learners’ identity, experiences, and engagement with communities, the metaphors also shifted.

Weaving Aboriginal understandings with understandings of competencies, Lauren recognized educators need to build on their cultural competence.

It goes back to the Aboriginal understandings, I found the problem with some staff is they want to do it, but they are not comfortable or they are afraid to in case it may come off wrong or disrespectful. Kids in grade 11 and 12, they know more in a sense, I find there is still a barrier to be willing to embrace it. (Lauren, 3b.16)

The concept of Aboriginal understandings stimulated participants to consider diverse contextual needs in relation to other worldviews about learning. These conversations could have been stimulated through a focus on technology or career development or other areas of the new curriculum. But because most educators needed to learn more about Aboriginal understandings, this was an effective stimulus for delving deeper into our contextual understandings. By exploring examples emerging from discussions of reconciliation and Aboriginal understandings, other concepts like equity, achievement, markers of success, culture, identity, and relevance shifted our conceptions toward a more complex understanding of competencies co-constructed around communities’ foundational beliefs about learning.

Cheetham and Chivers (1996) proposed that professional competence also needed to include “values/ethical competence,” which they defined as “…the possession of appropriate personal and professional values and the ability to make sound judgments based upon these work-related situations” (p. 24). Given educators’ interactions with many diverse communities, I sensed there was much more to explore if we were to delve deeper into weaving cultural contexts into our explorations of competencies.
A need to change our markers of success.

The new reporting guidelines also created a need for shifting our operational understanding of competencies. Dana’s questions about equity and markers of success might at first glance seem unrelated to our efforts to co-construct our understandings of competencies. In reality, they took us to our core beliefs about reporting.

Is equity going to be achieved if students are achieving [standardized tests] at the same level as non-indigenous students when these are a Western marker of success? It is not measuring what I want to see measured like: Do you have access to seeing your own culture and language reflected in your learning? Are you able to learn and express your learning in a way that works for you? (Dana, 3.22)

What learnings were we valuing in our collective activity as a district? By questioning equity in relation to what was deemed relevant and, therefore, valued and measured in potential reporting models for our learning communities, participants could see that the models we choose represent what we value in our learning communities. Engeström, Sannino, and Virkkunen (2014) explained how an initial “germ-cell” abstraction, like the concepts of competencies or equity in this study, “captures the smallest and simplest, genetically primary unit of the whole functionally interconnected system under scrutiny” (p. 122). By considering equity in relation to assessment and reporting of competencies “the very subject of learning is transformed from an individual to a collective activity system or a network of activity systems” (p. 122).

Discussing whether our markers of success were equitable for Aboriginal students also generated questions about whether our markers of success were relevant for any of our students. Ellen suddenly exclaimed, “We need to change our markers of success!” (3.23), to which Dana quickly responded with:
Exactly! So, the catch phrase that has been used for a few years now is that we want students to graduate with dignity, purpose and options. How are we measuring those things? Because right now, the measurements we have are not measurements of dignity or of purpose. (Dana, 3.23)

If what we were measuring did not reflect our values about learning, then we needed to address this dissonance. Our district assessment team had worked with teachers to create opportunities to question and integrate grass-roots ideas around assessment practices that would be effective for competencies, both core and curricular. Some of us reluctantly suggested that perhaps all or parts of the literacy assessments we had helped develop just a few years earlier would need to be reviewed in relation to new markers of success for defining competencies and our learning intentions.

Exploring what we meant by new markers of success, Lauren reflected on how parents in our learning communities were trying unsuccessfully to connect their past experiences with assessment with the district’s new competencies scale. One dad had asked, “So basically, if every gradation is 25%, beginning, developing… so would applying be a B or a B+?” (5.17). Moving to grade-less reporting and challenging the status quo, participants acknowledged we were asking parents to make a dramatic shift away from their personal experiences with schooling. To do this, parents needed examples they could relate to, so that explanations were not lost in translation.

When learners really start branching out and exploring in different ways, they are extending. So that dad’s translation of the grades is not going to work because the scale could stop at applying if we only want kids to do exactly what we ask them to do. Do we really want our society to be like that? “Wait. Then do exactly what I ask.” No! We would like learners to be independent, creative thinkers and critical thinkers and moving in different directions. Well, if we only teach to applying… (Karina, 5.20)

Engaging with parents to explore their perceptions about what it meant to extend learning brought out contradictions in perspectives that participants needed to negotiate.
Henry acknowledged that striving to develop creative and critical thinkers, personalize learning, and support individual and cultural identity did not mean every student would be on a completely different learning path.

Formative assessment is one of the greatest practices you can use to value diversity, differentiation, and to honour each child. “This is where you’re at, here is where I want to get you, and this is the next step.” And you just keep on doing that over and over again. It is not the workbook, “OK everybody… page 72”. I find it liberating once you understand it and realize that it is not an IEP [Individualized Education Plan] for each individual kid. (Henry, 5.16)

Henry suggested that educators need to be clear about how their broad expectations applied to all learners in their learning community, and then adapt those expectations to challenge learners by offering choices and targeted supports.

Picking up on Henry’s thoughts about choices, I shared an example about developing broad themes and then establishing common criteria.

With my students, we were all looking at systems, but they choose their system. Well, we had the solar system, we had the circulatory system, I had a kid who brought in a skateboard and said, “I can convince you it’s a system.” It was this broad thinking where learners could take what they were interested in and explore it. When we hear some people say, “Everybody needs to learn this…” Do we really want our whole society to be based on everybody having done the same work? (Karina, 5.24)

Participants suggested that meeting the needs of all learners meant understanding that learners would be taking on different roles in building the collective competence of our societies. Just as we met kids where they were at, we needed do the same with educators, parents, and communities because they were at different stages of this journey, too.

Expanding the collective competence of our working group—and also the learning communities with whom we were engaging—was an ongoing conversation. I
occasionally used formative intervention questions to delve deeper into previous discussions.

What are the barriers and what are the possible ways around those barriers? What is the resistance we might be seeing? Data entry for data’s sake is one resistance I am noticing. Are we doing reports for compliance or are we doing them because they are really building competence and changing the direction of where we are going in education? Are we bringing parents along as we share that information? (Karina, 4.5)

The district invited community input to build collective competence through parent surveys, information pamphlets, and through the District Parents’ Advisory Committee (DPAC). The Equity Scan was another source of input. Educators and learners were also giving feedback as they worked with new models of core competency assessments.

If you look at the curriculum, it is wanting us to personalize… it wants us to honour the child. It wants us to bring in Aboriginal perspectives like “learning takes patience and time.” All that is still saying it is the priority of relationships. We still have to teach, exams and all… but not at the expense of the relationships. (Faye, 5.28)

As we were communicating with students, parents, and other members of the community, did they feel their inputs and participation in these processes were valued? Were there better ways to expand understandings?

Lauren spoke about parents’ anxiety transitioning to high school with their child, questioning how to invite secondary parents into the conversations so they would have opportunities to understand competencies, assessment, and reporting in this journey.

When we had our Meet-the-Teacher night in September, the Grade 8 parents wanted to know why there are no grades… Some parents were livid. “We must have a number or a letter. How can they go to university if they never have a grade?” When I responded with, “Whoa. It’s grade 9. They still have grades for grade 10, 11 and 12”, the parents went, “Oh… well, that’s OK then,” and they did not say anything more. (Lauren, 5.17)
Change was happening and, despite the confusion, feedback from parents in the elementary grades seemed positive in relation to the new assessment practices as they were becoming more familiar with these communications.

**A need to transition into graduation years and beyond.**

In contrast to families in the primary years who were gradually adjusting to the changes as they worked with their children, families with students in the secondary grades were more anxious about tinkering with systemic changes that might have an impact on their child’s imminent options for post-secondary education and employment.

Many grade 8 and 9 parents are questioning grade-less assessment and our ongoing communication. It is good in some areas and emerging in others and some parents are making comparisons with their friend who they sit beside at the baseball field or the dance studio. They are starting to recognize some of the inconsistencies and recognizing that maybe, we are still learning how to implement some of these things. (Carol, 5.1)

Carol noted that many secondary educators, experimenting themselves with the new grade-less assessment approaches, were concerned about parents’ perceptions of their professional competencies as they were working to shift their practices, too.

As the new curriculum and assessment policies moved into the graduation years, educators, parents, and students in these grades were continuing the journey of co-constructing understandings that the K-9 learning communities had begun in 2016.

If you take our grade 3s, 4s or 5s right now, by the time they get to us in grade 8, they will have had four or five years and it will be a seamless transition. They will keep going and it will be so deeply embedded within their learning style that grade 10, 11, and 12 will look the same. It will not matter what the report card looks like. Their learning style will have changed so much. (Carol, 3.6)

Where K-9 partners could begin to see how competencies were encouraging learners to expand their learning in multiple directions, graduation partners were not yet there.
In July 2017, the Ministry of Education produced a *Curriculum Comparison Guide (2017)* for grades 10-12, opening with this statement:

> Overall BC’s redesigned curriculum brings together two features that most educators agree are essential for 21st-century learning: a concept-based approach to learning and a focus on the development of competencies, to foster deeper, more transferable learning. These approaches complement each other because of their common focus on active engagement of students. Deeper learning is better achieved through “doing” than through passive listening or reading. Similarly, both concept-based learning and the development of competencies engage students in authentic tasks that connect learning to the real world. (p.1)

With BC’s redesigned curriculum prepared to move into the graduation years (grade 10 in 2018 and grade 11 in 2019), it became even more important for secondary teachers to collaboratively co-construct their conception of competencies.

With this move into the graduation years, more questions were emerging and pointing to possible areas of resistance between the activity systems of our district and those of post-secondary institutions. “Depending on how assessment goes with the new curriculum, how do they [grade 12s] transition from one form of assessment to what universities are going to be requiring for entrance?” (Lauren, 2.30). Carol suggested that this was a time to be thinking twelve steps ahead because post-secondary schools were about to begin interacting with secondary changes to provincial assessments and report cards. Her comments pointed to a need for systemic alignments beyond our district.

> So post-secondary schools are leaning towards more of a portfolio/interview-based admission system. It is not happening this year or next, but they are things in the future. So we have to prepare our current, probably grade 7s, 8s, and 9s for a graduation where they might have to have a portfolio to apply. So, it definitely is something that has to be thought about now. (Carol, 5.27)

Both Carol and Lauren were considering graduates’ needs for the future as they transitioned from high school. At the time of this study, secondary teachers were still
dealing with a double bind of instruments that were not yet what they needed or wanted. For example, since FreshGrade’s platform appearance was aimed at younger grades, it needed to be redesigned for secondary students to use it as a graduation portfolio.

The changes to our redesigned curriculum were a reflection of broader conversations taking place across learning communities. Participants mentioned examples of shifts where the focus was more on collaboration and collective competencies in post-secondary institutions and Faye commented on changes to a teacher education program:

The program at VIU [Vancouver Island University] has student teachers in pods now… So you have five pre-service teachers in the back of your room for about a month [once a week]. Then they collaborate and immerse in the entire culture of the school. It is kind of cool. (Faye, 5.32)

Janice (5.21) also mentioned Quest University and some of their inquiry pedagogy.

Our working group’s learning intentions, along with our practical and contextual experiences, guided our decisions about what learning opportunities we took on in our roles, what data we collected, how we interpreted this data, and how we communicated our learning experiences to others. If participants in this group aimed to build on learners’ next steps—not for compliance or to justify our teaching, but to expand collective learning experiences—our communications with parents and communities also needed to align with our view of competencies as an ongoing, expansive continuum. Educators, parents, students, and our local communities also needed time and opportunities to learn about and adjust to this shift.

A Need to Assume Collective Responsibility for Competencies

It is hard just because it’s so much so quickly. Students, parents, staff… everyone is feeling like they’re in survival mode right now. We are all looking forward to being a few years down the road when it feels more normalized, but right now, it's overwhelming because it's been grand scale
change in all areas: curriculum, assessment, reporting; it's all so different and it’s all at once. (Dana, 4.17-18)

Recognizing the magnitude of the changes happening with curriculum, assessment, and reporting, Dana was not the only participant who admitted to feeling tired and overwhelmed. However, these feelings did not dampen participants’ convictions that our district was working toward positive changes in education. Our group also recognized that educators across the district were assuming huge responsibilities in this systemic change. In my review of the transcripts, participants were focusing not only on expanding their own competencies and working with students and colleagues, but also on supporting parents and other community partners to feel more competent.

In a sense, participants were exploring all the aspects of the “meta-competencies” that Cheetham and Chivers (1996) defined, i.e., communication, self-development, creativity, analysis, and problem solving as part of their holistic model of professional competence. Participants were then expanding this notion into the broader contexts of their learning communities. Engeström, Sannino, and Virkkunen (2014) stressed the crucial importance of “expansive transitions from individual initiatives toward collective actions to accomplish systematic change” (p.124). To explore how participants were supporting collective actions, in this section, I describe their efforts to encourage their learning communities to assume collective responsibility based on diverse roles, beliefs, and actions. The emergent themes reflected: 1) a need to engage leaders, followers and resisters; 2) a need to shift support resources and funding structures; and 3) a need to consider collective roles and responsibilities.
A need to engage leaders, followers, and resisters.

In our new learning contexts, participants were often leading with innovative ideas to stimulate changes. Many colleagues who jumped in as the first followers were willing to try something new, as long as someone else was leading. Others were perhaps more resistant to the direction of the curriculum changes. Sometimes reluctant educators were actively observing, analyzing, and learning from leaders’ mistakes to more effectively shift their practices. Even as participants were busy leading, they were aware of the challenges and the potential for failure involved in encouraging others to take risks, at whatever their level of readiness or reticence.

To comprehend two participants’ descriptions of their efforts to involve broader learning communities in expanding collective competencies, I rely on the agentive actions Engeström, Sannino, and Virkkunen (2014) enumerated as “resisting, criticizing, explicating, envisioning, committing, and taking consequential actions” (p. 125) (see bracketed actions in quotes).

Early on, Henry shared how the innovators on his staff had taken the lead in a school-wide Maker Day Project. During planning discussions, he noted the tensions where some staff members were eager [committing] and others were hesitant [resisting].

We could sense the tension [resisting] because this was a release of control with a lot of creativity, a buzz, things are all over the place, and it is not clean and tidy [taking consequential actions]. The hum in the school was exceptional… kids exploring, creating, taping, painting, and doing all these amazing things [explicating]. What was so incredible was that every staff member afterwards said, “We need to do that again next year” [committing]. So, risk-takers need to be encouraged to share their thoughts and their planning and help with the structure to give others permission to engage and try [taking consequential actions]. That’s not to say there were not certain teachers who were very controlling in the maker day space [criticizing]. (Henry, 2.18)
Being thoughtful about the process offered hesitant followers an opportunity to venture out of their comfort zones and attempt to take action without assuming the full risk. In this way, mentors willing to lead could potentially shift peers’ ideas about learning and stimulate colleagues to tackle new experiences. If an activity was too far outside of learners’ zones of proximal development, they would need other opportunities before employing these new strategies independently. Yet, hesitant learners were often willing to engage when they knew they would be supported along their learning journey.

Lauren had undertaken a school-wide science project in collaboration with an outside science agency with support from the local university. Her experience with expanding collective competencies was not without its challenges and, in describing her feelings, she also alluded to the potential overload others described in their experiences.

I am enthralled and at the same time I am disappointed. The staff said, “Yes, we’re going to do this” [committing]. Yet, they did not have any kids doing it in their science classes [resisting]. Some said, “Well, I told them about it” or “It’s too much work” [explicating]. They did not follow through and there was such an incredible disconnect [criticizing]. I would say, “But this is inquiry! This is it” [envisioning]. Some staff members were really into it and, with the kids, we were making it work [taking consequential actions]. (Lauren, 5.3)

It was hard work, there was resistance and criticism, and sometimes the coordination and communication challenges felt overwhelming. However, Lauren’s initiative to form a research partnership with professional scientists was an expansive learning experience for her students. Lauren believed that if we want to encourage students to move beyond the traditional boundaries of the classroom, then we have to be prepared to do the same.

Faye countered Lauren’s disappointment with only half of the teachers following through on their initial commitment, “I think 50% was great! Those kids are going to start
talking to kids that are not doing it and say, “Hey, these are all the great things I’m doing...” Look at the type of learning that you are offering…” (5.7).

You have just celebrated all the great things you are doing with the curriculum! Sometimes people have to actually see it and do it before they are able to do it themselves. There is this fine line where we have resistance, yet we have to keep going, we have to keep putting it out there, and with your wonderful opportunity… (Faye, 5.7)

Faye admired Lauren’s perseverance in providing students with this opportunity.

By choosing to lead in new directions, those who followed were learning so much. Despite the extra work involved, Lauren acknowledged that she was eager to continue.

Oh, I will do it again! 100%! [The students] are waiting at the door. It changes their viewpoint; they are excited, they want to do it. If you have faith they can and believe in them and they perceive that, then they step up. The grade 8s were on Google Scholar looking up research papers and publications! If they did not understand it, they asked and if I did not understand it, I would say, “I don’t know what that means.” It is okay. We show them we do not know and we can learn, too. (Lauren, 5.7)

On larger learning projects involving connections between schools and community partners, participants described the palpable energy despite the risks and challenges.

Learning communities were exploring their understandings of competencies through smaller scale classroom efforts involving open-ended project-based or thematic explorations presented to other classes. Through their efforts to incorporate Aboriginal understandings, diversity, and other creative applications of the big ideas of the new curriculum, many educators were initiating creative changes. As Engeström, Sannino, and Virkkunen (2014) noted, “the evolution of these types of agentive actions is in itself a learning process” (p. 125). Based on our experiences, this competencies focus on learning was an expansive collective effort.
A need to shift support resources and funding structures.

Dana observed that conceptual ideals and practical implementation of a competencies approach also required a shift in resources and funding structures.

This piece around core competencies and curriculum has changed so drastically, especially with Aboriginal understandings brought into all of the subject areas. What is not there is how are we supporting teachers to build their level of understanding and confidence…? How can we do this with a real lack of resources and funding? (Dana, 4.1)

Dana was referring specifically to challenges at the local level, where educators were turning to Aboriginal Education Assistants for support. Yet the roles and responsibilities defined by the funding structures for Aboriginal Education were not set up to support all learners and educators in the district. Dana noted how “their work was becoming increasingly more complex and at a really fast rate” (4.3).

Using this example, participants explored some of the historical tensions between our existing funding constructs and our ability to create and access resources to support the shift from past practices toward expanding collective competencies.

We’re still trying to operate from the same constructs that have been in place for years. So, it’s like we’re trying to change things but using existing funding platforms… [Aboriginal Education targeted funding is] not part of the students’ core education funding; the school is responsible for everything that's inherent to what all students receive. (Dana, 4.1)

Dana elaborated on the role of this targeted funding to provide extra academic support, social emotional support, and cultural enrichment for Aboriginal learners.

This shifting dynamic illustrated a tension around the challenges of accessing, creating, and providing support resources for clearly identified needs among educators, while complying with the restrictive funding criteria for Aboriginal support to students.

There are resources that haven’t been created yet and that would really be useful, especially when we look at local culture, local history, and local
understandings. It’s figuring out how to do this within these existing constructs that don’t allow for that. (Dana, 4.2)

Local Aboriginal communities had been approached to help with resource development, but as access to current funding was attached to specific criteria and data, these structures needed to be changed or aligned with the emerging expectations for support and resources. Dana also questioned how to simplify data collection to support the changes without making “an already complex job even more complex” (4.2). Participants agreed that many support staff workers were trying to meet competing demands with limited amounts of time. The historical intentions for assistants were to support individual students, but this support had been reduced and had morphed into providing support for many students. Indirectly these supports were benefiting students of Aboriginal ancestry and those with diverse learning needs. However, the increased demands also had reduced the time available for individualized student support and personalizing learning.

The district was also seeking ways to challenge and shift funding criteria to align with new intentions. In one example, the district approved “Inquiry and Innovation” school-based funding to allow a teacher to support collaborative learning approaches with colleagues. The challenge with this funding was that skilled teachers were reluctant to take on this role because they did not want to be absent from their classrooms for a half day per week. To counter this resistance, the district relaxed the funding criteria so schools could propose models that fit with the diverse needs of their school contexts.

[With our model], all of a sudden, we had teachers in new grades saying, “Can I sit down with you and share resources?” So there are conversations that are starting to happen. I am noticing there is not the resistance around the assessment either. “Since I’ve got some time to do this, I can do it properly and take some time with my kids one-on-one.” (Karina, 5.12)
Determining how to benefit from funding and resources was a negotiated collaborative and collective responsibility.

In our fifth working session, participants offered several snapshots of ways educators were sharing and accessing resources that were also shifting funding practices. Henry described how educators were sharing existing resources like novel sets in “small groups of maybe five or six… We may think people are not using resources, but they are using them in a different way” (5.17). Lauren added that, in the past, people had been very proprietary about their resources (5.28). Carol and Marissa, in their positions, had opportunities to share school-created resources with colleagues from different schools, inviting them to adapt the resources that sparked their interest (5.33).

Building on these examples, participants identified emerging structures for creating and sharing resources. Lauren and Faye mentioned shared electronic folders (5.34). I pointed out how our staff had a “Competencies” binder right next to the photocopy machine that colleagues were using (5.35). Carol referred to the English Language Learning Weebly website as a brilliant source of information (5.35).

Isaac explained how something as simple as deciding to have students bring their own supplies had taken on new meaning for him, as he questioned how his past practices of buying all the supplies had helped him put organizational systems in place for students.

At the start of the school year, I’ve got kids coming with bags of supplies. “I don’t even know what you’ve got! Does everyone have a binder?” [Student] “I’ve got duo-tangs, but no binder.” Before I would order thirty red binders for science and 30 blue binders for math. (Isaac, 6.16)

Isaac’s example might seem trivial on the surface, but I saw it as a metaphor for educators questioning so many of their practices. In this example, learners come to school with their “stuff” and educators use their preferred schematics to help students get
organized, not knowing in advance if all students are able to operate within these constructs (Karina, 6.15). Our focus on competencies is not only challenging foundational beliefs and frameworks of learning; it is also shaking up both simple and complex organizational routines and structures that educators have often relied on to feel comfortable and settled in their daily learning realities and contexts.

A need to consider transformative agency from a collective context.

Educators’ work has always been challenging but it seems that it is becoming more complex. With a collective responsibility to weave in Aboriginal understandings, Dana shared her observations about shifting roles.

In this concept of collective ownership of Aboriginal education, more teachers and administrators are taking personal ownership and responsibility for Aboriginal Education whereas, it used to be, “That's for the Ab Ed people; they will take care of that.” Now everybody is trying to do their part and that is the thing that's going to make a really meaningful difference… if everyone in the system is invested in the idea and doing their part. (Dana, 2b.2)

Committing to take collective responsibility and actually taking consequential steps to act on that decision are both forms of transformative agency. Rather than considering one to be better than another, I found it helpful to consider them as stages in the expansive learning cycle. So instead of pressuring educators to embark all at once, being at different stages offers opportunities to experiment, to observe, to question, and to adjust.

Faye also questioned whether diverse perspectives were well represented among teaching and support staff so students had diversity in their role models. Were learners seeing their cultures, identities, and interests reflected in the cultures and histories of the adults who worked with them? These questions were brought up in relation to the Aboriginal Equity Scan but the questions then led us to consider how our activities were
influenced by division of roles and responsibilities in education. Some participants commented on the support from trustees and senior management around reconciliation, inclusion, equity, and assessment. For example, Henry noted:

That is one thing I appreciate from some of our senior management. We have permission to relax, to breathe, and play. “Do what you think, give us feedback, what needs to change? Come into the huddle, let’s see how this is working.” If it’s not, “Here is what you need to do.” (Henry, 6.12)

The participants in this study were engaged in a wide variety of roles aimed at shifting practices around Aboriginal understandings, assessment, collaborative inquiry, teacher support, Universal Design for Learning, and ongoing parent communications. To contribute in diverse ways, we needed to consider the expectations of our roles and how we were engaging with others in our learning communities. To question markers of success in relation to our co-constructed understandings of competencies, we needed to consider our beliefs about equity and assessment, culture and language, access and expression, not only for individual student learners, but also for adults interacting with our system. Yet, we also needed to consider the beliefs held by community partners and how their beliefs aligned with our aims to expand learning options for all learners. Otherwise, our district vision of “safe, caring, and inclusive schools” would ring hollow and the motivation to pursue collective competencies would diminish.

At the time of this study, the staffing changes in our district were quite extensive, presenting additional challenges for understanding competencies within these shifting contexts. There were the significant staffing changes in September 2017 because of the restoration of the 2002 class-size language in BC. Coupled with the district’s complete re-organization of Aboriginal assistants and the usual shift of employees at the start of the school year, it was interesting to hear how Faye described the changes at her school.
At our school, I have a new teaching partner; we have three new divisions, and a new administrator. Therefore, there are many new things crossing with old things… We've had a lot of changes with the class size changing and then a new class being added one week and then another new class another week… but what's consistent is that we are grade-less and we’re maintaining ongoing communication with parents as a priority. So it does not seem as panicked at our school about communicating the curricular competencies or the core competencies. There seems to be a little more, “I will be able to handle it.” (Faye, 5.2)

Faye mentioned grade-less reporting and ongoing communication with parents, both new reporting models from the previous year, as examples of consistency. Perhaps it was comforting for educators that, even amid all the changes, their role was still to assess student progress and communicate with parents?

In our efforts to appreciate district-wide understandings of diverse competencies, we had to keep in mind the valuable and diverse skill sets and experiential contributions support staff members like Aboriginal educational assistants and special needs assistants brought to expanding pathways for personalized learning competencies.

We might have had this stellar person doing guided reading with groups and supporting everybody and really building up our literacy competencies but if that is not your focus and suddenly you have this amazing background in art, or language or cultural stories. Why would you not share that? Why would you not bring that piece in instead? (Karina, 4.12)

The adults in our schools bring different knowledge, skills, strategies, processes, and aptitudes to our learning communities. Do these adults feel valued as change agents?

Changing roles and assignments of personnel within our work environments were a reality of educational systems. Sometimes these changes resulted in a surge of positive energy and dynamics; sometimes they created instability and uncertainty.

This year, because we laid off all of the Ab Ed EA's and most of them posted into different positions, they are going in and they are picking up on that. “Well, the person before you used to do…” and they are feeling inadequate because they are not that person and the skill set that they are
bringing is very different. What worked for one person is not going to work for the next person. (Dana, 4.12)

Participants pinpointed how disruptions in staffing were challenging schools’ efforts to expand their collective competencies. Dana commented on how these moves were equally challenging for many of the individuals who had built relational attachments with their school communities and then had to start over in a new community. It was difficult for these employees to feel their contributions to building communities were valued.

As we worked to build strong relationships, changes in staffing could provide new energy. However, if these changes were unexpected or not well understood, as was the case for Aboriginal education assistants in June 2017, this risked destabilizing change efforts to build collaborative learning communities.

I think of how you started the Equity Scan… with the permission to be human. We are humans, we care about kids and we want them to succeed. How do we do that in ways that are respectful, purposeful, and intentional? There are so many layers to that. (Karina, 6.12)

For members in our learning communities to feel confident contributing to a safe, caring, and inclusive system, they needed to know they were also safe, cared for, and included in their learning communities. Individuals who felt trusted and supported could then put their energy toward collaborating wholeheartedly with their learning communities.

**Tertiary Needs: Contextual Understandings in Local Communities**

To underscore our district responsibility to include voices from communities working with our schools and to create the conditions that support their inclusion as partners, I reflected on Chaiklin’s (cited in Daniels, 2008b) compelling reasons for embracing human development; I compared his ideas with participants’ efforts to explore the contextual understandings of competencies in our communities.
If we are to embrace full human development, the more we (as researchers and humans) can understand about humans – as individuals and as collectives (in the form of groups, organizations, states, etc.) – the better we will be able to create conditions that support the development of the conditions under which we live, in relation to our understanding of human life (what some might call ‘the good life’). (p. 36)

While students and educators were becoming familiar with competencies as a concept and a practice, community partners were also wrestling with this shift (see Table 10).

Table 10

Tertiary Needs: Contextual Understandings of Competencies in Communities

<table>
<thead>
<tr>
<th>How did we, as educational leaders, use contradictions and resistance from local learning communities to co-construct contextual understandings of competencies?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Need to Include Voices from Intersecting Communities</td>
</tr>
<tr>
<td>These themes emerged from participants’ expressed needs to...</td>
</tr>
<tr>
<td>- Examine resistance from secondary colleagues and students</td>
</tr>
<tr>
<td>- Expand learning conversations with parents</td>
</tr>
<tr>
<td>- Invite community partners to add their voices</td>
</tr>
</tbody>
</table>

Participants were involved in reaching out to community partners as part of our change efforts. Considering voices from our multiple communities opened new pathways to expand our collective learning. Venturing down these various paths, we were continually re-aligning our visions with the practical realities, contexts, and input of communities.

Our attempt to co-construct understandings of competencies was a responsibility shared with other partners in our learning communities. The strength of the tapestry we were weaving together would be determined by the depth, impact, and sustainability of our change efforts, not only from our perspectives, but also from those of the community.
Chapter 9 Reflecting on Transformational Shifts

To conclude my analysis of our working group’s expansive learning cycle, I reflect on how our process extended our understandings of competencies and supported transformational shifts to practices in our district. According to Engeström and Sannino (2010), in formative interventions “the aim is to generate new concepts that may be used in other settings as frames for the design on locally appropriate solutions” and where “the process is led and owned by practitioners” (p. 15). While my study may inspire others to examine systemic change in their contexts and engage in their own future expansive learning cycles, for now I focus only on our group’s formative intervention experiences.

When I asked participants to reflect on our expansive learning journey, I began by referring to Ellen’s earlier questions about contradictions in our process, “When we talk about baby steps, can we get where we need to go? When do we need to blow things up a bit? It is very difficult to reach this vision through the old pathway” (3.26). Like Ellen, participants suspected that incremental steps would not get at the paradigm shift we were envisioning for improving collective learning across our system. Sometimes effecting change requires more dramatic shifts; one salient example of this is how the district’s new reporting formats stimulated new perspectives on how to communicate learning.

I did not realize that Ellen’s comment would also apply to my analysis process. Initially, I took baby steps to sort and code the data from our sessions. I attempted to disentangle and then weave together the strands of themes gleaned from our interactions, but my interpretation would have been confusing to others outside of our group. As I debated how to represent my analysis, I wondered about the connections between our learning process and the original stimulus of our efforts: to co-construct our
understandings of competencies. When I examined the themes from my draft analysis in relation to the core competencies, I noticed connections I had not seen earlier in the process. Once I noticed these connections, relatively late in this process, I needed to blow apart my analysis chapters to make visible to others what I was only just beginning to see myself – that the ideas participants had shared were interwoven strands informing a more holistic view of the core competencies as they applied to continuous learning. To make this evident to others, I had to incorporate the core competencies into the matrix of my analysis.

Initially, I had represented the themes emerging from participants’ ideas in relation to the four contradiction states of the expansive learning cycle. As my four research questions corresponded with these states, I organized my analysis into four chapters. However, I later came to recognize that if I organized the themes according to the three strands of the core competencies (personal and social, thinking, and communication), I could represent our group’s co-constructed process using the core competencies language that was more familiar and accessible to educators in BC.

Returning to the matrix I was using to represent the themes from my analysis, I added a heading for each of the core competencies (see Table 11). Then, I tentatively placed each theme within one of the core competencies columns. In our working group, we had not focused on core competencies separately. However, attempting to make visible the links between the themes and the core competencies in this matrix facilitated my effort to explain our group’s co-constructed process to others. Categorizing these themes in relation to the strands of the core competencies forced me to consider how the themes within each strand had evolved through the stages of the expansive learning cycle.
### Table 11

**Quaternary Needs: Shifting Teaching, Learning, and Assessment Practices**

A summary of the themes and sub-themes in this study loosely organized into meta-themes based on the Core Competencies of BC’s New Curriculum

<table>
<thead>
<tr>
<th>Personal and Social</th>
<th>Thinking</th>
<th>Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competencies</td>
<td>Competencies</td>
<td>Competencies</td>
</tr>
</tbody>
</table>

#### Chapter 6: Questioning Conceptual Understandings

To co-construct conceptual understandings of competencies, participants need to...

<table>
<thead>
<tr>
<th>Positively Engage Learners’ Personal and Cultural Identities</th>
<th>Focus on Learning as a Process</th>
<th>Envision Competencies as a Systemic Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Honour personal and cultural identity</td>
<td>- Shift from a focus on content to a focus on process</td>
<td>- Have a continuous learning mindset</td>
</tr>
<tr>
<td>- Engage with and own learning</td>
<td>- Mediate social learning processes</td>
<td>- View competencies as a continuum</td>
</tr>
<tr>
<td>- Actively contribute to society</td>
<td>- Focus on metacognitive awareness</td>
<td>- “Measure” competencies in new ways</td>
</tr>
</tbody>
</table>

#### Chapter 7: Mediating Shifts from Ideals to Practices

To mediate from ideals to practices with competencies, participants need to...

<table>
<thead>
<tr>
<th>Engage in Collaborative Practices</th>
<th>Create Instruments that Support Learning as a Process</th>
<th>Design New Models for Communicating Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Expand collective competencies</td>
<td>- Design learning options that value differences</td>
<td>- Challenge assumptions about assessment practices</td>
</tr>
<tr>
<td>- Build trust and acknowledge vulnerability</td>
<td>- Plan for intentional inquiry</td>
<td>- Include learners’ reflections about their competencies</td>
</tr>
<tr>
<td>- Mediate tensions and intentions</td>
<td>- Stimulate the sharing of expertise and resources</td>
<td>- Design new competency assessment models</td>
</tr>
</tbody>
</table>

#### Chapter 8: Exploring Contextual Resistance with Communities

To expand contextual understandings of competencies, participants need to...

<table>
<thead>
<tr>
<th>Include Voices from Intersecting Communities</th>
<th>Expand Assessment Paths and Options into Communities</th>
<th>Assume Collective Responsibility for Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Examine resistance from secondary colleagues and students</td>
<td>- Weave Aboriginal understandings into competencies</td>
<td>- Engage leaders, followers, and resisters</td>
</tr>
<tr>
<td>- Expand learning conversations with parents</td>
<td>- Change our markers of success</td>
<td>- Shift support resources and funding structures</td>
</tr>
<tr>
<td>- Invite community partners to add their voices</td>
<td>- Transition into graduation years and beyond</td>
<td>- Consider transformative agency from a collective context</td>
</tr>
</tbody>
</table>

#### Chapter 9: Reflecting on Transformational Shifts

To shift teaching, learning, and assessment practices, participants need to...

<table>
<thead>
<tr>
<th>Honour Local Collaborative Learning Communities</th>
<th>Co-Construct Diverse Learning Paths</th>
<th>Shift Systemic Practices Toward Expanding Competencies</th>
</tr>
</thead>
</table>
Within each theme, I limited my analysis to three sub-themes emerging from the ideas participants had contributed to our working group. As I went back and forth through this analysis, reflection, and representation process, I shifted the order of the themes and sub-themes within each chapter and returned repeatedly to the data to clarify how each strand had evolved.

This process allowed me to trim my tangled mess of themes into three meta-themes, one strand for each of the core competencies. I then followed each meta-theme through the stages of our expansive learning process. Crafting my analysis in this way allowed me to weave together the connections between our expansive learning journey and our co-constructed understandings of competencies so readers could follow our process. My analysis chapters of this study may seem too structured for such a fluid process; however, they did not start out that way! Examining 223 codes and 14 hours of participants’ interactions involved making difficult decisions about which ideas were most central to our process and the needs participants expressed.

Having trimmed our process to focus on three foundational meta-themes related to our understandings of competencies, in this chapter I conclude my analysis by considering my fourth research question: How do educational leaders perceive this focus on competencies to be shifting teaching, learning, and assessment practices in their local school district? Engeström’s (2010) fourth or quaternary state reflects on practices that are stabilizing, as well as those that still need alignment. I reflect on our group members’ efforts to support the district with practices that were stabilizing or still being aligned in relation to: 1) a need to honour local collaborative learning communities; 2) a need to co-
construct diverse learning paths; and 3) a need to shift systemic practices toward
expansive learning. I connect each of these meta-themes emerging from participants’
comments with my understanding of activity theory and the expansive learning cycle.

A Need to Honour Local Collaborative Learning Communities

This first meta-theme, which I refer to as “a need to honour local collaborative
learning communities,” emerged from participants’ emphasis on:
- a conceptual need to positively engage learners’ personal and cultural identities;
- a practical need to engage in collaborative practices; and
- a contextual need to include voices from intersecting communities.

I associate these three themes with how participants were co-constructing their
understandings of the personal and social core competencies strand of the new
curriculum. From an activity theory perspective, this meta-theme builds on the triadic
relationship between participants, our interactions with our learning communities, and the
competencies focus of the new curriculum. This meta-theme incorporates the core beliefs
and values of honouring the collaborative relationships that underpinned our process.

Within their learning communities, educators play an important role in mediating
processes; ideally, the focus on competencies can “honour all the teaching and the time
that we take to build a community in a small classroom” (Faye, 2.34). I was surprised by
the number of times the notion of “honouring the diversity amongst our students [and
educators]” (Bridget, 1.7) was associated with participants’ explanations of how to
engage all members of the learning community. The notion of encouraging participation
by all was also evident in efforts to consider diverse perspectives from our communities
as we talked about “honouring elders’ views” (Karina, 3.10). Honouring the collaborative
efforts of our learning communities was a foundation for participants’ interactions with each other and with colleagues, students, and communities in our district.

Building on our shared vision to positively engage learners’ personal and cultural identities, Dana added another interpretation to this notion by focusing on Aboriginal identity in educational environments. She included her reflections on the internalisation processes at work shaping us as individuals, personally, professionally, and culturally.

I have had this conversation with other people who are of Aboriginal ancestry and work in education. It is as if you never get to separate who you are personally versus your professional role… there is an extra onus of responsibility with culture and language… you’re carrying your personal identity into your professional role. (Dana, 4.8)

By including everyone in local learning communities, participants were building on their conceptual premise that, as a district, we needed to honour the personal and cultural identities of every learner. This can, in effect, stimulate more collaborative forms of agency. The challenge to collaborative agency was how to honour and work with resistance, as sometimes the actions of individual students, educators, or parents negatively impacted communities. What needed to shift so all learners could be motivated to expand their personal competencies and contribute positively to the collective competencies of their learning communities?

Our district’s vision already listed the values of “collaboration, community, courage, diversity, equity, inclusion, and respect” (NLPS, 2015). I considered how these values were reflected in our district’s systemic practices, and how our efforts to expand our district’s collective competencies aligned with these values. Participants considered the importance of the district’s vision of “Success for All” for all members of our learning communities, not just students; the adults also needed opportunities to engage in
collaborative practices where they could be challenged and respected for their diverse contributions.

As educators, we needed opportunities to align our ideals for collaborative learning communities with our practices, working in an open way with our colleagues. As she thought through this process, Naomi acknowledged that some teaching practices would remain unchanged, while others no longer corresponded with the new focus on competencies.

I see this curriculum shift as an exciting opportunity to learn with each other about what we have been doing that is essential to carry on and share with others, in addition to exploring alternative practices from a variety of settings and disciplines… [This] requires us to be humble and brave at the same time. I recognize this is uncomfortable for many and I am interested in learning how to facilitate that process… I know I still have a lot to learn and I look forward to learning with this group. (Naomi, personal communication, May 27, 2017)

Through ongoing formative interventions, participants were supporting colleagues to take risks together. In their work with colleagues, participants were noticing the ripple effect of their efforts to focus on collaborative practices in their schools and in their classrooms.

According to Isaac, encouraging colleagues and students to extend their understandings of core competencies as a social learning process in our K-12 continuum was motivating future collaboration and engagement beyond schooling and into society. The competencies framework has relevance beyond the classroom.

We put everything into this part of the journey. As educators in the K to 12 system, we have looked at it as a start in kindergarten and a stop at grade 12 and then our job is done. But we have to remember that once learners leave our K-12 system, they have the whole world to navigate. The competencies really get down to, “You need to think, you need to communicate, and you need to be personally, self- and socially aware.” What is our role? Maybe it’s a bit self-assured to think it’s our job to
shake that as we are just one little organization in a big world. Maybe it’s too daunting to think we are ultimately responsible for that… (Isaac, 2.23)

Janice agreed that educators’ roles have shifted; consequently, she was encouraging educators to be more aware that “we are influencing the lives of these children and every single interaction, every single day is going to influence and shape them” (2.23). Even though educators have always officially recognized that learning does not start and end with formal schooling, this shift to a competencies focus has accentuated the role of educators in modeling and embedding practices of ongoing, engaged learning.

This need to honour local learning communities was also reflected in several participants’ efforts to meaningfully engage with families and local communities and involve them in expanding their understandings of competencies as a paradigm shift. The Aboriginal Equity Scan, as Dana explained, brought together community members to examine how the district and local Aboriginal communities were aligning their visions for a safe, caring, inclusive system where learners experience school as a place that offers dignity, purpose, and options.

The analogy we used at the Equity Scan was the braid. There are three strands: reconciliation, equity, and inclusion. They sound like separate topics but they are not. They are interconnected. There are certain aspects of them that are unique, but holistically they are the same. (Dana, 6.7)

Like the inclusion, equity, and reconciliation strands of the Equity Scan, participants in our working group were weaving together their diverse understandings of competencies as an expansive learning process by intersecting personal learning journeys, professional collaborations, and ongoing interactions with community partners.

Through ongoing interventions, participants in this study were contributing to this ideal by encouraging agency within their learning communities. This resonates with the
statement from Engeström (2010) that, “a key outcome of formative interventions is agency among the participants” (p. 84). Focused on their conceptual ideals about competencies, participants were shifting teaching, learning, and assessment practices so that all learners, including adults, would be able to positively engage and honour their diverse personal and cultural identities, expand their learning options, and actively contribute to society.

Participants acted on their ideals by engaging colleagues and students in practices that would expand collective competencies, build trust, and allow learners to acknowledge feelings of vulnerability. Participants were mediating tensions and intentions within their broader learning communities through several means: working with secondary colleagues and students, expanding learning conversations with parents, and inviting community partners to add their voices to this effort. From an activity theory perspective, as participants explored the tensions of multiple voices in diverse communities, members in these communities also expanded their collective understandings, which led them to propose new solutions and models to fit their contexts.

**A Need to Co-Construct Diverse Learning Paths**

In the second meta-theme, I reflect on participants’ efforts to co-construct diverse learning paths with their communities. This meta-theme was shaped by participants’ descriptions of critical and creative thinking competencies, including:

- a conceptual need to focus on learning as a process;
- a practical need to create instruments to support learning as a process; and
- a contextual need to expand assessment paths and options into communities.
Participants described their efforts to encourage colleagues to think intentionally about the object of their activity as they engaged in planning and assessment around the big ideas of the new curriculum. These conversations offered a means to expand our collective understandings of critical and creative thinking competencies. From the perspective of activity theory, this meta-theme links the relationships between participants’ use of mediating instruments to shift foundational rules and structures toward teaching, learning, and assessment practices that reflected their competencies focus.

At a conceptual level, participants wanted educators and learners to understand that their rich cultural contexts and experiences contributed to their ability to think critically and creatively about their personal and social learning in diverse contexts. Ellen suggested that learners needed models to help them determine their next steps so that they could engage in making sense of learning as a shared, collaborative process.

We have to be able to design [models] that let kids know where they are at and they need the freedom to feel comfortable moving forward. When we focus on the process of learning and whom we want people to be at the end of the journey... we have to think through how we are providing those opportunities for them. (2.21)

Participants offered many examples of mediating instruments they were discovering and co-constructing with students and colleagues to provide practical supports for exploring collective learning as a critical, creative, and reflective thinking process.

Embedding professional learning communities into the structure of the school day gave educators both time and space to co-construct their understandings of competencies and focus on learning as a process. Mediating open-ended professional learning in schools and at district-wide events offered educators opportunities to challenge each other
and to take their learning experiences and their shared responsibilities to new levels.

Ellen also viewed this working group as a safe learning space.

I will admit that when you said, “What do you need to get out of this?” what was going through my mind was how lovely it is to have this time. When I am racing from meeting to meeting in my world, having the space and time to have intellectual conversations about a subject we love and are striving to be a part of, it is kind of a gift. We don’t often get a chance to slow down and start from the mind and the heart and reflect. To be able to do that with people you respect, it’s a good opportunity. (3.27)

Janice continued with “and to do this without judgment or fear of repercussions. Just to have open dialogue” (3.27). Building on this need to have safe learning spaces for leaders, Carol expressed her appreciation for this safe space where she could test her ideas. She wondered how to extend this process into her work with colleagues.

I think that teachers need to be able to say, “I don’t understand this. Can somebody show me how to do this?” I feel like we are coming up against this a lot with inquiry and formative assessment. Teachers are backing off because if they do not understand why they are doing something, then it has no meaning for them. And the why takes time. I can have you do FreshGrade tomorrow. But why are you using FreshGrade? That might be a 3 to 5 year learning journey to use it for what it was intended. So how do I build that capacity when I am still learning myself? (5.7)

Carol commented on her challenges as she attempted to expand her understanding of competencies while interacting with and contributing to her collaborative learning communities. She suggested leaders and educators needed more opportunities to inquire and reflect on their ideals and practices to gain confidence in their diverse competencies while working alongside colleagues and students.

From their diverse contexts, participants were defining and aligning their practices to support other educators with moving away from deficit models of learning; they were encouraging others to recognize and work with the gifts each individual contributes to society. Sharing their experiences with their learning communities, participants
understood that success could not be defined only by graduation from our system. They proposed that success needed to be defined by focusing on individual and collective competencies as an ongoing series of diverse pathways co-constructed for multiple purposes and options. Ellen added:

In some ways, that is where the personalization of our curriculum and our teaching comes into play. Everyone is going to jump in at a different place that is relevant to them when it comes to focusing on the curricular competencies and the core competencies. (2.31)

Like Ellen, to clarify their future-oriented ideals for changes as the new curriculum moved into the graduation years, participants recognized the tensions of balancing group instruction with personalized learning experiences.

Participants questioned their own beliefs and experiences, especially as they worked to shift systemic rules and structures. They did so, in part, by examining where learners and educators were in the moment, how they came to that place, and where they envisioned the need for change. Janice offered her reason for being excited about the current changes:

A key driver for why I want to engage in this is being able to see our colleagues who are doing this experimenting and then they sit down and have the conversation, “This is what we got out of it…” I help build that excitement and think, “Gosh! I want to belong to that!” (3b.11-12)

Moving through this expansive learning process, participants were invited to explore their conceptual and future-oriented ideals for systemic changes. Engeström (2010) explained how the object of collective activity “is an invitation to interpretation, personal sense-making, and societal transformation” (p. 78). Participants made sense of competencies by operationalizing and experimenting with instruments that moved change efforts in the direction of our ideals. As participants explored practical applications of competencies
with other members of their learning communities, these members presented new ways to understand competencies, thereby adding new layers of collective meaning.

Throughout this exploration of diverse learning paths, the concepts of balance and structure were important. But, as Henry added, “then there’s that creative step into chaos… where the real learning is alive and electric” (2.10). The cycles of expansive learning were just that—cycles of activity and reflection—periods of unstable, intense activity followed by periods of reflection, stabilization, and realignment (Engeström, 2011). Encouraging and supporting colleagues to take those creative steps was just one example of how participants were acting as change agents in this district.

By examining the expansive learning cycle from the lenses of historical and cultural needs, as well as conflicting binds and resistance, I commented on the need to balance structures and routines with the desire for creativity and innovation.

We get to a place where [the students] were actually driving the learning. It’s exhausting to go at that speed. The other part about balance is maybe sometimes we need wide-open inquiry and sometimes we just need some grounding, going back to something calm for a bit, so we can gather our energy and go again. (Karina, 2.11)

I observed how participants expressed the tensions they were feeling as they worked with colleagues to expand their perspectives.

I also listened to their expressions of joy when they described how the educators they were supporting began envisioning new patterns or models for exploring competencies. As leaders, we did not have to come up with every solution. In one example, unhappy with the self-assessment templates for students, participants described how teachers adapted or designed their own versions to fit their learning contexts. Often colleagues’ new models also pushed us to re-design models we had been working on in
ways we had never imagined. As educators examined competencies from their contexts, through the lenses of their practices and ideals, they exposed new contradictions and were often stimulated to search for their own solutions.

Moving forward, the next-step challenges for our district were to consider how to effectively share the diverse learning paths educators were developing through their exploration of big ideas with students. How, as a district, could we develop diverse learning paths to expand collective critical and creative thinking processes?

**A Need to Shift Systemic Practices toward Expanding Competencies**

For the third meta-theme of my analysis, I reflect on participants’ efforts to shift systemic practices toward expanding understandings and demonstrations of competencies. This meta-theme was linked to how participants were co-constructing their understandings of communication competencies. It emerged from participants’ descriptions of:

- a conceptual need to envision competencies as a systemic change;
- a practical need to design new models for communicating competencies; and
- a contextual need to assume collective responsibility for competencies.

More specifically, the lens of activity theory highlighted participants’ efforts to consider how roles and responsibilities might shift in relation to their learning communities’ co-constructed ideals about competencies.

Early on, Isaac commented that it was exhausting to focus on competencies as a learning continuum. He questioned how to sustain the energy needed for this ongoing, expansive work. “How do we create relevant, engaging, challenging curriculum for a
whole class? How do we sustain that?” (1.12). Individuals could not to do this work alone; this shift required the collective efforts of members in our learning communities.

Finding a balance between sustaining learning momentum and taking opportunities to pause and reflect on accomplishments was especially true when participants experienced resistance from their learning communities. Dana observed that:

If you do not connect first through the heart, you will never connect through the mind, and then you will never change practice. You have to feel something. We need to be letting people know, especially when we're looking at Aboriginal history and experiences, that it's okay to feel emotions that are unpleasant. I think that through the years, we've really moved away from saying we don’t want kids to feel anything that’s perceived to be negative. It is negative and we can talk about the painful things that have led us to where we are today. (6.12)

Participants were sustained by their beliefs that intentionally engaging with diverse learning communities would make a difference for learners in our district. However, at least for the immediate future, this also increased their responsibilities as educational leaders and added to the workload demands placed on all educators.

Our working group sessions were an opportunity to briefly lighten the load of our roles by sharing ideas and frustrations; they also allowed us each space to celebrate small successes before plunging back into the unpredictable and often immediate “next-step” needs of our learning communities. Reflecting on our sessions, Dana offered this comment:

During one of our first meetings, I chatted with someone who said, “You know what? We don’t create opportunities like this often enough. We have PLCs, we have pro-ds, we have meetings, but we always fill them and we don't allow time for people to talk… pose a few questions… just allow people to have conversations like this to mull things over, to go back and forth… I think we are all busy, driven people, and we want people’s time to be meaningful, so we structure it and we fill it. (6.24)
Dana’s comment is important as it signals a shift in the role of leadership to stimulate collective expansive learning. The working group sessions were a means for participants to support each other in their roles as change agents, even as they were also being challenged to understand the change processes stimulated by the new curriculum.

One major focus of systemic changes was centred on learners having a voice in assessment practices. Professional learning communities, curriculum implementation days, and ad-hoc working teams were examining ways to expand learners’ understandings of their core competencies. New assessment and reporting instruments were shifting and being shifted by adjustments to teaching and learning practices. Most importantly, these shifts were opening spaces for learners to generate ideas and align their practices with their visions for their learning communities.

So that’s learning the art of balance and how to create experiences that allow space for reflection and rumination and incorporating this into their [learners’] own understandings and then making that explicit for themselves. (Janice, 2.11)

Through these conversations, shifts were also happening with participants’ communication practices. By asking, “Where are the contradictions? Where are the tensions?” and working through these, we could consider our next-step actions. Most often this was a slowly evolving process, but occasionally there were breakthrough moments where participants could suddenly see new options, as when Ellen exclaimed, “We need to change our markers of success!” (3.23).

Lauren reflected on the progression of assessment from summative grades toward formative feedback and now to assessments as reflections on expanding competencies.

If I could go back and do a mental snapshot from 10 years ago, there have been big, positive changes for students. There is less emphasis on getting the number… It is hard to articulate, but it is not just about the number, it
is about the student. You can see the students changing and wanting to make a difference themselves. Therefore, whatever is happening is a good thing, but it is slow. I find this curriculum really lets those students that would not have succeeded before have that success… It actually engages them and inspires their passion in what they're interested in. (Lauren, 5.13)

Reflecting on student progress more frequently using feedback and formative assessment was already a practice in many classrooms. Transforming this practice to better communicate with parents on learners’ competencies was central to the Ministry’s new Student Reporting Guidelines (Government of British Columbia, 2016). Competencies were new, but beliefs about ongoing learning and formative feedback were not. The aim now was to engage learners in deeper and more meaningful reflections.

Several participants were involved in district learning and assessment committees and they were pleased when the district decided to use the Ongoing Communication of Student Learning (NLPS, 2017a) and the Student Competencies Continuum as templates to replace traditional progress reports. These new reporting models surpassed the expectations of the Ministry’s Student Reporting Guidelines. Henry noted that even though it “seems like we have been working forever on this stuff [assessment], we are actually one of only a couple of districts that moved forward with the grade 8 and 9 [grade-less reporting]” (6.6). Henry went on to share:

We did that for a very important reason because there is that magic wall between grade 7 and 8 where they say, “Oh that’s everything that happens in elementary.” Well, we looked at the new curriculum as being K to 9 and this different way of seeing curriculum and kids’ learning. You can’t tell me that grade 10 to 12 is going to be drastically different once it comes out of draft and when we figure out how to assess properly. So, what’s the best way to prepare our system for change? It’s to start moving it along, to start graduating it. (6.7)

This progression through the grade levels was viewed as an opportunity for educators to support parents with understanding the changes to assessment practices.
Discussing the shifting practices around competencies, participants considered how communities might eventually come to view success differently in relation to our district’s vision of “Success for All” and its underlying premise that all learners graduate with “dignity, purpose and options” (Halbert & Kaser, 2013). From the outset, students’ self-reflections on their core competencies, often referred to as “I can…” statements, gave students new avenues for having learning conversations with educators and families. Rather than having the district design perfect self-assessment templates, Henry realized he could access and share those his colleagues were creating.

Sharing personal and collective experiences opened our eyes to other worldviews and new possibilities in our vision of “Success for All.” Instead of ranking learners’ scores against standardized outcomes, our approaches were aimed at providing more equitable learning experiences and aligning our assessments with our visions of success.

The ways First Nations and Aboriginal communities traditionally educated their children are now being recognized as valid and meaningful ways to teach and learn: inter-generational learning, land-based learning, hands-on learning, collaboration, individualized learning plans, identifying the skill sets and the gifts that each student has and building from there… even inquiry… All of that is so parallel with traditional Aboriginal pedagogy and teaching philosophies. Seeing those parallels and knowing these ways of teaching and learning are not just what is best for students of Aboriginal ancestry, they are what’s best for all kids. (Dana, 2b.2)

Several participants admitted needing to develop their personal competencies in relation to Aboriginal understandings, not in a superficial way but as an integral part of their educational practices. Our group understood that we were learners on this journey, too.

Going further, Dana recognized that, in order for educators, students, families, and communities to begin assuming collective responsibility for reconciliation efforts, there needed to be an emotional connection. Only then could we begin to shift historical
perspectives and take consequential actions to improve possibilities for all learners, and especially for Aboriginal learners.

I always say if you are not feeling some kind of sadness or anger about this, then you should. You know, otherwise it’s not going to resonate and if it doesn’t resonate, it’s not going to change your perspective, and if doesn’t change your perspective, it’s not going to change your practice. If you do not change your practice, it’s not going to change the outcomes, which is really what we want for our short and long-term goals… So, I think it’s the same for kids. For it to be really personal and meaningful for them, they have to connect to it on a deeper level. (Dana, 6.12)

Reconciliation was a shift to re-value previously omitted historical and cultural practices; it was about righting the wrongs of the past, as well as about unlearning practices that diminished contextual and cultural opportunities to share and learn together.

When the Ministry of Education proposed the framework for the new curriculum, the BC Education Plan (2012a), and followed this with the Student Reporting Guidelines (2016), these changes were not created in a vacuum. These changes reflected the expressed visions of individuals and communities who had been pushing for change over time. Participants in this study continued this push for change by actively questioning the links and disconnects between our learning communities’ past practices, our present realities, and our ideals for the future in relation to a competencies focus.

**Quaternary Needs: Transformational Understandings of Competencies**

For change initiatives to take root and become truly enduring practices, our working group and our district needed to move beyond abstract ideals. We needed to formulate concrete, complex concepts about competencies as integrated processes of knowing, doing, and understanding. Members of our learning communities needed to be able to connect their lived experiences with their educational learning environments and with their broader societal contexts.
In this chapter, I reflected on the expansive learning cycle of our working group in relation to the transformative shifts in our district. In many cases, participants worked to initiate and support these systemic shifts. I indicated where some practices were stabilizing, while others still needed further alignments. Taking the lead from my research questions and the contradiction states of Engeström’s expansive learning framework to inform each chapter of my analysis (see Table 11 in the introduction to this chapter), I crafted three meta-themes. Each meta-theme represents one of the core competencies of BC’s new curriculum, which illustrates the expansive learning process of our working group’s efforts to co-construct our conceptual, practical, contextual, and transformational understandings of competencies.

As Ellen mentioned when we started this journey, perhaps we would not have a succinct district definition of competencies. We could always fall back on how *Building Student Success: BC’s New Curriculum* defined competencies as “the intellectual, personal, and social skills that all students need to develop for success in life beyond school” (BC Ministry of Education, 2018b). However, this definition did not address the contexts and future-oriented purposes of competencies, so it was inadequate for describing the deeper comprehension that could only be gathered through questioning, experiencing, and adjusting in actual learning communities. Participants in this study introduced examples central to our co-constructed process of expanding understandings of competencies in relation to BC’s current educational reform.
Chapter 10: Reflecting on this Expansive Learning Journey

When whole collective activity systems, such as work processes and organizations, need to redefine themselves, traditional modes of learning are not enough. Nobody knows exactly what needs to be learned. The design of the new activity (externalization) and the acquisition of the knowledge and skills it requires (internalization) are increasingly intertwined. In expansive learning activity, they merge.

(Engeström, 2010, p. 75)

My stimulus for embarking on this journey emerged from a desire to better understand the significant changes taking place in British Columbia with the introduction of competencies as a focus for Building Student Success: BC’s New Curriculum (BC Ministry of Education, 2018a) and the province’s new Student Reporting Guidelines (Government of British Columbia, 2016). However, as I reflect on the significance of this working group’s efforts to co-construct understandings of competencies, I realize that, as a group, we also expanded our understandings of what it means to lead and to learn as a collective. This study was informed by participants’ visions, needs, and interactions centred on honouring local collaborative learning communities, co-constructing diverse learning paths, and shifting systemic practices toward expanding collective competencies.

I conclude our working group’s journey by reflecting on: 1) outcomes of this formative intervention study; 2) limitations of this study; 3) expansive learning as an exploration of activity theory; 4) potential next steps for future research; and 5) my closing thoughts on competencies. As I worked to weave together the change stories that emerged from this group, I saw the energy participants had invested in expanding our district’s collective understandings of competencies. This has been a rich opportunity to document and analyze the many ways participants supported and expanded the collective competencies of our learning communities in the early stages of implementation.
Outcomes of this Formative Intervention Study

This research was timely because of our district’s decision to simultaneously implement both the new curriculum and the new reporting guidelines. However, it was through the dynamic interactions with the research participants that I was able to fully appreciate the many layers of change associated with co-constructing and supporting the transition to a competencies focus in our district. When I initially designed this study, I envisioned a group of educational leaders coming together to challenge existing routines and structures in order to explore possibilities and models aligning with the new curriculum’s focus on competencies. I thought our group would then collectively commit to some form of concrete action. This was not at all what happened.

What I discovered instead was that these leaders came together with a desire to share their visions, fears, excitement, and questions about how our provincial focus on competencies was shifting our local practices. They were motivated to participate in this study so they could interact with each other to exchange experiences, gain new insights and confidence, pause and reflect, formulate next-step actions, and then return to their busy learning communities, where they would continue their efforts to support colleagues with improving learning and expanding understandings of competencies.

I have to smile because… sitting here, it’s kind of like being in the eye of a hurricane. From where we are sitting, it is calm right now, but out there, things are swirling, and people are going, “Hmm?” (Karina, 6.15)

I learned from this group how the power of individual actions, working across multiple activity systems toward a common object, had the potential to drive systemic change.

Activity theory explains learning as an active transmission of knowledge. Engeström and Kerosuo (2007) emphasized that “changes must be initiated and nurtured
by real, identifiable people” (p. 340). Weaving together our diverse school-based experiences with our equally diverse personal and professional experiences, our group co-constructed our district vision of competencies. In some ways it seemed as though Engeström’s (2010) theory of expansive learning had been written for the transformative processes of our competencies journey.

The theory of expansive learning puts the primacy on communities as learners, on transformation and creation of culture, on horizontal movement and hybridization, and on the formation of theoretical concepts… In expansive learning, learners learn something that is not yet there. In other words, the learners construct a new object and concept for their collective activity, and implement this new object and concept in practice. (Engeström, 2010, p. 74)

Reviewing my research questions, I realized how much the formative intervention conversations of our working group sessions had helped us expand our understandings of competencies outwards into our communities and deeper within each of us.

The shifting vision for learning expressed by this group’s co-construction of competencies is not unique to our district. Other districts are on a similar journey, but it is unlikely they have had this opportunity to step back and analyze the change process while they were in the midst of it. The challenge of researching change practices is that the whirlwind of daily actions leaves little space to pause and reflect. Engeström and Kerosuo (2007) noted a need to develop systematic methodological guidelines for interventionist studies of learning in work activities. Informed by Engeström’s expansive learning cycle, I have rephrased my original research questions and my focus questions more generically (see Table 12) so they could be used as a methodological framework for groups considering change initiatives in other contexts to explore communities’ understandings, motivations, and initiatives aimed at shifting systemic practices.
Table 12
Possible Considerations for Formative Intervention Research

<table>
<thead>
<tr>
<th>Potential Areas of Contradiction in Research</th>
<th>Potential Focus Questions and Considerations to Expand the Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questioning needs</td>
<td>What motives engage us? Consider how communication processes are shaping communities’ individual and collective motives, needs, and identities (cultural-historical experiences with roles, communities, rules).</td>
</tr>
<tr>
<td>How are we working together to co-construct our conceptual understandings of our activity?</td>
<td>What still works? What no longer works? Changes? Explore ways to intervene to shape collaborative support systems, differentiated personal learning processes and to reflect on, assess and communicate changes.</td>
</tr>
<tr>
<td>Exploring double binds</td>
<td>How can contradictions enrich understanding? Seek input from external communities (boundary crossing) as zones of proximal development, explore divergent pathways, and allow for distributed actions toward this activity.</td>
</tr>
<tr>
<td>What tools are we accessing and creating to support our practical understandings of our activity?</td>
<td>What is becoming stable? What needs to be realigned? Honour the multi-voiced experiences, balance cycles of intense change with time for reflection, question alignment of changes with vision.</td>
</tr>
<tr>
<td>Exploring resistance</td>
<td></td>
</tr>
<tr>
<td>How are we using contradictions and resistance to develop new understandings about our activity?</td>
<td></td>
</tr>
<tr>
<td>Reflecting and re-aligning</td>
<td></td>
</tr>
<tr>
<td>How do we perceive our actions to be shifting our practices in this activity?</td>
<td></td>
</tr>
</tbody>
</table>

In my analysis of these questions throughout this study, I focused on how participants co-constructed their conceptual ideals and supportive practices while navigating the tensions of their diverse contexts to expand both their own understandings of competencies and those of their colleagues and students in ways that would: honour local collaborative learning communities; co-construct diverse learning paths; and shift systemic practices toward expanding competencies. Participants encouraged learners at all levels to actively co-construct local visions and actions focused on competencies. They worked with students, colleagues, and members of their broader communities to access and create new instruments to support thinking about learning as an ongoing process, including changing traditional markers of success and weaving in Aboriginal
perspectives. Alongside their learning communities, participants were designing new communication models and questioning how to align support structures with the competencies focus. This study was an opportunity for participants, as educational leaders, to pause, question, and reflect on their everyday efforts to support students and colleagues and to expand their own understandings of competencies.

Figure 10 is a visual representation of the broad range of stimuli and actions shaping our group’s expansive learning process in relation to the research questions.

Figure 10. Activity Theory Framework of Co-Constructed Understandings of Competencies
Drawing on the second generation activity theory framework, I summarize the internal and external stimuli motivating our working group’s efforts to shift teaching, learning, and assessment practices in relation to rules, communities, and division of labour as we co-constructed our understandings of competencies. Change processes are messy and involve multi-layered interactions embedded in the cultural and historical contexts of the communities involved. Figure 10 is a reflective pause, a snapshot in time that attempts to portray the triadic relationships at play as participants worked with their communities to co-construct expanded understandings of competencies in our district. This figure does not represent the end of our work; there is still so much more to know, to do, and to understand as participants continue to align and stabilize practices. Completing this study brings closure to the formal process of our working group’s expansive learning cycle, yet participants’ work with their learning communities continues.

The significance of this study lies primarily in its potential to contribute to K-9 educational practices in British Columbia but also in other jurisdictions where the focus on competencies is a core element of curriculum change initiatives. The themes emerging from this research revealed how this group of educational leaders envisioned shifts to teaching, learning, and assessment practices in relation to the new focus on competencies and also in relation to their beliefs and ideals for improving learning for students, for their colleagues, and for themselves. These leaders had the courage, experience, and/or expertise to accept a role in their school and in our district that involved stimulating and supporting systemic changes. However, their statements revealed how these leaders were also learners in this change process, and as learners, they had many of the same fears, uncertainties, and needs for support as other members in their learning communities.
The process I used to make sense of the themes emerging from our working group’s interactions is significant in that it offers a model for educational leaders attempting to co-construct conceptual, practical, and contextual understandings of transformative changes within their learning communities. Using a formative intervention research process informed by activity theory and the contradiction states of the expansive learning framework, I was able to organize and stimulate inquiry processes that created spaces where participants could both lead and learn as they attempted to improve systemic practices.

**Limitations of this Study**

There were so many benefits to conducting this research while our district was in the middle of major changes that it is difficult to address its limitations. However, there are four areas I consider to be limitations and each centres on a need for more time: 1) more time for participants to engage with the data; 2) more time to work with secondary educators and community partners just beginning to engage with the new curriculum; 3) more time for participants to remain in their same roles to deepen and expand their expertise; and 4) more time for reflecting on ways to bridge understandings between academic research expectations and the realities of working in K-12 schools.

The first limitation is a cautionary note that the participants who agreed to join me in this study were working from my interpretations of the transcripts and not from the actual transcripts. Already committed to and engaged in leading various aspects of the curriculum change process, these individuals had a deeper understanding of competencies than many of their colleagues in their learning communities. This was an advantage but it also meant that each participant was extremely busy. Therefore, to honour the time
participants were giving to this process, I summarized the sensitizing concepts and key ideas in preparation for each session and shared these summaries with participants.

While this study is significant because of its place at the centre of major curriculum changes in our school district, at the time of this study many of these changes had not yet worked their way through the graduation years. Grade 10 to 12 teachers, students, and parents were at the beginning of the change cycle. Conducting this study over a longer period of time would have given a more complete picture of the scope and impact of the changes in our system. Also, by focusing on those leading this educational change, I was not able to include the voices of community partners, students, and parents whose questions, aims, tensions, and needs would have revealed additional layers of our district’s transition toward a competencies focus for learning.

Participating in academic research of educational practices, while also working full-time, requires commitment, passion, flexibility, and endurance. This is especially true in a time of intense change. The study took place between April and November of 2017. After only seven months, six of the participants were in different roles. A year after the conclusion of this study, only three of the twelve participants were in the same roles or schools. While changing roles and locations has the benefit of spreading participants’ experiences more broadly, it is also a limitation in that some of the depth gained by working with a community of learners may be dispersed or lost. Without the direct involvement of district administration and school trustees in this study, there is also the potential that the formal uptake from the district on participants’ efforts to shape future directions may be more limited, even though the informal impact has been quite broad.
Throughout this study, I felt I was walking in two worlds with distinct cultures where I needed to simultaneously translate for both sides. I was a formative intervention researcher striving to make a contribution to the academic research literature while also supporting educational practices in schools. To this end, I involved participants in interpreting and member-checking the data to the extent possible within their busy roles. Participants reviewed their statements included in this study and several reviewed the theme charts or read draft sections of the analysis chapters. However, the representation process was largely done with input from my research committee. This dissertation represents my best efforts to weave together two major elements: the expansive learning cycles of our working group’s change efforts within our learning communities and my personal academic journey, motivated by my research interest in activity theory and competencies. The expansive learning process involved in representing the working realities of practice in an academic dissertation was an epic effort to weave together the worlds of academic research and school district practices.

**Expansive Learning as an Exploration of Activity Theory**

I have come to appreciate the extent to which the contradiction states of Engeström’s (2010) expansive learning framework were powerful formative intervention tools supporting my research process. The expansive learning framework was a foundation for focusing on the complexities participants were bringing to the working group process, based on their diverse experiences with their learning communities. Both Engeström’s second and third generation frameworks of activity theory respectively depicted the activity of our working group and our boundary crossing relationships with the intersecting systems of our learning communities that were also informing this study.
To more accurately represent the dynamic interactions of our working group, the space at the centre of our activity theory framework needed to include the contradiction states of the expansive learning cycle. Figure 11 highlights our working group’s expansive learning process, while at the same time recognizing participants’ work with intersecting activity systems in multiple learning communities across the district. The nodes of the larger activity triangle represent the sensitizing concepts, while the connecting lines and questions point to triadic relationships influencing our working group’s actions. The smaller activity triangles to the right represent the intersecting learning communities also informing participants’ experiences.

Figure 11. Expansive Learning at the Centre of Activity Theory
At the centre of this framework, the contradiction states of Engeström’s (2010) expansive learning cycle point to the tensions and possibilities emerging from the boundary crossing interactions between our working group and our learning communities. Working with formative intervention tools to guide each session, participants identified their next level needs as they worked to support and shape actions within the working group and in their learning communities. Participants’ interactions in the working group sessions are representative of the broad range of the expansive learning interactions taking place across our district as we focused on emerging needs for educational practices in relation to competencies.

Through this research process, I have come to appreciate the challenges of formative intervention research. The expansive learning cycle is an iterative and dynamic process at the heart of each activity system, and also at the core of the potentially shared objects between systems. As I analyzed the interactions of this working group, contradictions emerged between historically-situated rules, roles and community beliefs, and participants’ future-oriented aims. Needs shifted as community involvement expanded. Changing contexts also interrupted and shifted the flow of expansive learning cycles, pushing participants to re-examine their ideals and needs from new perspectives. Working through each session, participants in this study revisited and refined their perspectives on competencies. In my analysis, I tried to emulate the iterative and jagged process describing the many layers of our intersecting experiences in this working group. Focusing on the tensions and contradictions of the expansive learning framework provided rich spaces for examining how our group was co-constructing understandings of competencies.
No single action could define or achieve the object of our systemic activity. In this study, participants were involved in a wide range of actions potentially impacting many learners across the district. As described in the analysis chapters of this study, participants were working to honour their local collaborative learning communities by positively engaging learners’ personal and culture identities, engaging in collaborative practices, and including voices from intersecting communities. Participants were co-constructing diverse learning paths by focusing on learning as a process, accessing and creating instruments to support learning, and expanding assessment paths and options into communities. Participants were shifting systemic practices toward expanding competencies by envisioning competencies as a systemic change, designing new models for communicating competencies, and assuming collective responsibility for competencies. Their actions were more than a systemic operationalization or implementation of competencies; they depicted a tapestry of dynamic and formative leadership interventions that were stimulating, supporting, and transforming educational practices across our district.

My research also contributes to a deeper understanding of how educational leaders co-construct their conceptual, practical, and contextual understandings with others, and how they use these understandings to shape local changes and policy implementation. Participants in this study were not selected on the basis of their leadership styles or their titles. They agreed to participate in this project because they had a mutual need and interest to understand the new curriculum and the focus on competencies so that, in their leadership roles, they could support colleagues and students. From this perspective, formative intervention research has far-reaching potential
as a collaborative learning model aimed at supporting educational leaders and their learning communities with navigating locally-constructed visions and understandings of change and locally-designed solutions for shifting educational practices.

**Potential Next-Steps for Future Research**

Activity theory and the expansive learning cycle offer frameworks for questioning and analyzing systemic change initiatives. The formative intervention process used in this study could be applicable to other contexts where the aim is to explore and shape systemic change through collective inquiry and action. As learning communities have their own culture, history, and future dreams to explore, it would be interesting to experiment with this research design in other jurisdictions to explore how individuals and groups shape educational aims and needs within their local contexts and systems.

The competencies focus of the new curriculum stimulates potential research questions for how diverse learning communities are expanding and extending members’ co-constructed perceptions and actions in relation to teaching, learning, and assessment practices. For example, in what ways might students’ perceptions and reflections on their core competencies shift their agency as learners? How will the new reporting models encourage learners to extend their competencies in new directions and go beyond teachers’ expectations? How might the focus on competencies shift learners’ sense of personal and cultural identity? In what ways might this focus encourage more active learner engagement for all members in a learning community?

As districts across the province continue to align and reflect on changes to curriculum and reporting, other systemic alignment needs are emerging. Our district’s initiative to embed time into the school day for professional learning communities lead
participants to question the extent to which these collaborations were shaping changes to practices within our schools and across the district. Participants wondered whether other organizational and leadership structures and practices need to be realigned as a result of our shifting focus. For example, how were our district vision statements and staff assessment practices aligning with provincial and locally constructed understandings of competencies? In what ways were changing roles and responsibilities through hiring and transfer practices aligning with the intentions of school-based and district learning communities? How was the focus on competencies changing educators’ workloads and their satisfaction with their roles? What factors were expanding or diminishing educator and learner engagement with these change processes?

Participants identified a need for district practices that focused on building trusting relationships and addressing fears and feelings of vulnerability so educators, students, families, and community partners could feel safe doing the work in their collaborative learning communities. Robertson (2011) suggested that “to successfully transform current practice and create future practice in this challenging educational context, school communities will need high levels of capability, high levels of trust, and leadership practices that create and maintain such cultures” (p. 213). As educators continue to question and co-construct instruments to improve options within and across learning communities, many possibilities emerge for further research. Using expansive learning, activity theory, and formative intervention research, the matrix shown in Appendix O is a starting point for generating potential questions that might be considered as a case study of a school, a class, a leadership group or a grade level cohort to assess the
impact of the curriculum change initiatives in relation to expanding learners’ competencies. Our work is certainly not done.

One aim of this research was to move beyond a narrow definition of competencies as a checklist of knowledge, skills and attitudes in order to co-construct more holistic understandings of competencies in local contexts. For example, our district’s competency scales assessments (emerging, developing, proficient, and extending) were aimed at stimulating learners to engage in next-step actions extending beyond their demonstrations of curricular competencies. An area for future research would be to explore the impact of this change to assessment practices. Another question would be to consider the extent to which the meta-themes described in this study—honouring local collaborative learning communities, co-constructing diverse learning paths, and shifting systemic practices toward expanding collective competencies—are reflected in other learning communities’ efforts to conceptualize and actualize their visions for change.

The participants in this study often commented that we were all learners in this journey. Working from this perspective, all members in our learning communities are potentially both leaders and learners. Therefore, the themes emerging from this study may also have potential implications for shifting views on educational leadership. For example, Hargreaves (2011) suggested that fusion leadership “moves beyond multiple styles of leadership not just by drawing attention to situational differences, or to developmental evolutions of leadership over time, but by acknowledging people’s higher-level capacities to integrate different characteristics, competencies and capabilities into a unified whole” (p. 230). Could Hargreaves “unified whole” also apply to expanding people’s collective competencies as members of collaborative learning communities?
My Closing Thoughts on Competencies

In their roles as educational leaders, participants from this study continue to influence changes in our district. Elementary educators are still expanding their understandings of competencies. Graduation teachers are just beginning their expansive learning cycle, and community partners are at varying stages of understanding the competencies focus of the new curriculum, depending on the level of their interactions with the district. In addition, external factors, such as the final version of the Ministry of Education’s student reporting guidelines, may still generate a need for new changes.

School districts are not one unified system, but rather a tapestry of communities made up of individuals with varied historical and cultural layers of experiences and identities. Systems do not create change; individuals working within these systems initiate, stimulate, and persevere to transform ideas into new practices. As individuals reflect and act on their visions, their efforts to create, access, and engage with mediating instruments often stimulate others to take consequential actions. Where the system provides opportunities for groups to gather, discuss, and shape co-constructed visions of the future, the outcomes may look nothing like what the change initiators originally envisioned. Such is the nature of activity theory and expansive learning; the learning cycles never end, they shift. In schools, educators continue to take action, sometimes gradually, sometimes dramatically shifting local practices. Whether new systemic objects take hold will depend on how well their outcomes serve the motives of the participants engaged in a particular activity system, and the foundational beliefs, rules, and roles of this system’s community and those acting within and upon it.
I see activity theory as an exciting theoretical framework for exploring systems in the throes of dynamic change. While this framework could be used to analyze a system in crisis, it is equally suited to exploring long-term change processes of gradually shifting practices. The expansive learning framework focused the object of our working group activity on transforming and expanding our understandings of competencies in relation to our practices. My role as the researcher in this formative intervention process was to keep bringing participants back to addressing the core object of our activity by asking them to expand on their statements, experiences, and questions. Our working group had an opportunity to step away from the busy day-to-day actions and operations in order to view our efforts with the new curriculum changes from different perspectives.

This study describes our working group’s expansive learning journey - a journey that took courage. Participants commented that it was worth their effort to be a part of this working group. They especially valued the opportunity to exercise their professional autonomy in co-constructing these aims as we worked with colleagues across the district. Our conversations with each other and with our learning communities disrupted and stimulated our thinking and expanded our perspectives so new potential solutions could emerge. We have not reached the end, as there is no “end” to learning; however, these options took us down paths we had not previously imagined possible. This is the premise of expansive learning.

For me, the greatest reward is seeing students and educators of our learning communities engage in new learning journeys with purpose and dignity, aspiring to contribute to society in myriad ways. How we come to know, do, and understand influences our actions and shapes our journeys of becoming. What we become, that is up
to each of us! Reflecting on this journey and what was accomplished, there were so many breakthroughs.

Competencies are not simply about each learner acquiring the knowledge, skills, and aptitudes relating to the traditional curriculum subject areas. Core competencies (communication, thinking, personal, and social) focus on individuals and collectives knowing how to be flexible in their thinking based on specific contexts and specific purposes. Given the increasing complexity and diversity of our learning environments, both in and beyond schools, no one individual could do all this alone. Our educational vision for core competencies was not only about how individuals internalized these understandings, but also how they worked with others to take consequential actions that would serve to expand their collective competencies. It was not only about learning in classrooms, but about lifelong learning. This is a vision that includes all members of our learning communities as transformative agents in an ongoing learning journey. It is a vision that creates spaces for learners to lead and leaders to learn because every member of a learning community has personal, cultural, and academic contributions to share.

Participants’ commitment and passionate visions were instrumental in questioning and positively influencing the outcomes of this study, and these participants continue to enrich the experiences of learning communities across the district. At the conclusion of this formative intervention process, I have an enriched perspective of the complexities of activity theory and expansive learning. I also have a deep appreciation for how the members of this working group shared their visions and their actions, intent on bringing about positive changes in our district. Our working group focused on competencies within the contexts of our learning communities. From this group’s ideas emerged a
collective sense that as a district, we needed to: honour local collaborative learning communities; co-construct diverse learning paths; and shift systemic practices toward expanding collective competencies. These leaders had the opportunity to come together and to challenge each other. Co-constructing understandings is an expansive learning process that is most significant to those at the centre of the process. However, the ripple-effect of that process, when expanded into communities, can have powerful implications for how leaders and learners engage with and stimulate each other.

I expect the young man I met in Alert Bay at the start of my research journey has graduated from high school with dignity, purpose, and options. I would love to know what new paths he is exploring and how he is extending his competencies in ways that are positively shaping his identity as a learner and as a member of his multiple learning communities. I am excited that learners across BC are being encouraged to show what they know, what they can do, and what they understand in ways that extend beyond standardized expectations; in this way we can begin to explore untapped critical and creative thinking possibilities through shared understandings. I am also encouraged to see a shift for educators away from the former checklists of learning outcomes and toward an agentic process as professionals responsible for creating the visions and the next-step learning paths with their students.

I close with this suggestion from Henry in consideration of our next steps in this expansive learning journey:

It’s always about conversations. We can read books about pedagogy, but it’s through conversations that we reinforce our thoughts and are challenged. That’s the real pleasure; I don’t think we get enough pleasure from being challenged and from asking questions. I always enjoy that opportunity. (Henry, 6.24)
Our co-constructed tapestry is an invitation to other learning communities to begin their conversations by examining their visions, needs, and actions for improving learning. There are myriad paths to explore when leaders and learning communities have the courage to take the first steps toward improving their local learning environments with their eyes, ears, hearts, and minds wide open to weaving together new possibilities emerging from their co-created visions. I look forward to continuing these courageous and expansive learning conversations both in research and in practice.
References


Delors, J. (2013). The treasure within: Learning to know, learning to do, learning to live together and learning to be. What is the value of that treasure 15 years after its


Younk, K. (2003). *One province's conception of curriculum integration: Transforming educational reform ideals into the Québec Education Program*. (Master), McGill University, Montreal, Canada.
Appendix A: Proposal Shared with District Staff, February 2017

Exploring Assessment & Reporting of Competencies in the Redesigned Curriculum

Rationale
The notion of competencies is new to BC’s redesigned curriculum. In addition, the BC Ministry of Education has published *Interim Guidelines for Student Reporting* (2016) which include a requirement that students assess their developing core competencies. In my doctoral research with UBC, I propose to examine how educational leaders (both principals and teachers) collaborate to frame their understanding of competencies, how they create structures and spaces to explore their understanding, and how the integration of competencies influences planning, teaching and assessment practices for student learning. I am interested in using formative intervention research modeled after Yrjö Engeström’s Change Laboratory research, a process evolving from cultural historical Activity Theory (CHAT), which explores how individuals generally achieve greater success with change processes by working collaboratively through intentional interventions than they could if they were working alone.

Activity Theory Frameworks in our school system, educators (subjects) work with a variety of instruments (curriculum, assessment tools, resources, etc.) to improve learning for our students (the object or motive of our activity). We rely on the histories and cultures of our communities, the rules that define and regulate our system, and the ability to divide the workload among partners in education.

Multiple groups in our district (principals, teachers, school communities) work toward this shared vision in similar ways where success is defined by the visions and motives of each group.

Proposal – Formative Intervention Research to Expand Collective Learning
The details of this research proposal are subject to change with district input. I am outlining the broad strokes of the research method I propose to use. Suggestions and feedback are welcome so I may adjust the parameters of this research proposal to inform district aims for improving teaching, learning and assessment practices with competencies.

Proposed Participants for this Research
K-12 educators participating in this research study would be invited through the Principals’ & Vice-Principals’ Groups, I & I Teachers, District Assessment Coordinators, Pilot Project Teachers, and Natsumat Tatulut (the district professional learning committee). Even though the graduation portion of the program is not yet complete, I would hope to have some secondary educators involved.

As researcher-practitioners, the participants in this working group will collaboratively collect, develop, and assess core competency assessment and reporting tools to inform our system’s reporting framework and to move us toward our collective vision of improving student learning. Each of the six sharing sessions would be 60-90 minutes in length. By aiming for up to 12 participants in the working group, if participants are not able to attend every session, the group is still large enough to be able to do significant sharing and exploration of understandings.

Research Time Frame
This working group would meet for six formative intervention sessions to explore solutions for planning, assessing, and reporting with competencies. The aim of spreading out the sessions over a period of 3-4 months would be for all participants to have time in between sessions to explore and test their ideas, examine successes, frustrations, challenges, and to develop further
questions (preferably with artefacts educators would bring with them… video, text, photos, and samples of work).

Initial Information Session (Combined with session 1)
Volunteer educators from district and school levels are encouraged to bring their ideas and questions regarding teaching, learning and student assessment with a focus on competencies. The research group will together examine and define its common goals, questions and focus areas in relation to competencies.

Session #1 - Exploring Primary Contradictions (Need State): Questioning
- What are our motivations for working together to construct our understanding of competencies?
- How do we frame our visions for changes to learning through competencies in our district?
- How can our questions and actions influence or drive this vision?
- What is our vision for supporting others with constructing their understanding of competencies?

Session #2 - Exploring Secondary Contradictions (Double Bind): History and Data
- Past: What parts of our old assessment and learning models no longer fit with the redesigned curriculum? What needs to change? Why? (historical analysis; evidence of past practice)
- Present: What evidence do we have that points to a need to make changes between our current model (BC Education Plan) and our past teaching, learning, and assessment practices?
- Future: Where does our past practice fit with our current vision of learning? Where does past practice collide and require changes?

Session #3 - Modeling new solution(s)/examining new models: Our interim or transition phase
- What solutions do we propose for teaching, learning and assessment with a competencies focus?
- Thinking through the proposed assessment and communication of learning model(s), in what ways do these changes meet our vision?
- As we work with these models, what do we discover? *The process and models will shift and change depending on the directions participants opt to explore.

Session #4 - Exploring Tertiary Contradictions: Resistance to Implementing New Models
- How do we plan for and understand reasons for resistance?
- In sharing lived school experiences to create new solutions, what elements or models could we share with our school colleagues in our district or provincially?
- By openly questioning and expressing contextual challenges to better support our school colleagues, what do we learn about resistance as a stimulus for generating new ideas?

Session #5 - Exploring Quaternary Contradictions: Realignment with Neighbours
- Other districts are also grappling with how to implement this curriculum shift. Documenting and sharing our efforts in our district could support their efforts just as their work has supported ours.
- What happens after grade 9, into the graduation years (grade 10-12), and beyond?
- How do we work with parents to build their understanding of competencies?
- What changes will the Ministry make after this interim period? How might our work with partner groups inform those decisions?

Session #6 - Consolidating our Practices; Celebrating Successes
- What might be our next steps? How can we share the findings of this study with others, possibly through co-authored executive summaries, reports or presentations?
- Where would we like to be a year from now?

Karina Younk, October 2016, Revised February 2017, Final Version March 2017 (for BREB)
Appendix B: Superintendent’s Letter - District Approval to Conduct Research

April 10, 2017

Ms. Karina Younk
Principal,

Dear Ms. Younk:

Re: Request to Conduct Research: Understanding Competencies as a Shift in Education Practices in British Columbia.

Thank you for submitting your request to conduct a research project in our district to investigate and understand the competencies, tools or models that are being developed to accommodate the shift in Teaching, Learning and Assessment practices.

I am pleased to provide you with approval in principle. As explained to you earlier, you will now need to obtain agreement from the 12 participants who will collaborate with you on this project. Included with this letter are SD 68 Board Policy, Procedure and Guideline documents related to conducting research work in our district – for your information and compliance.

Thank you for your interest in pursuing your project with our school district. We look forward to receiving a summary report of your results.

✓ Superintendent/CEO

pc: Assistant Superintendents, attach
/pdg.
Dear,

I am a graduate student with the Faculty of Educational Studies at the University of British Columbia and Principal at . I have received permission from District Superintendent, to contact you as an educational leader and potential participant for this study. The first aim of this study will be to examine how a group of educational leaders can come together and use the experiences from their schools to co-construct a district vision of competencies. The second aim will be to then use this vision of competencies to create tools and models to support colleagues in schools with their efforts to shift their teaching, learning, and assessment practices. My study is entitled: Understanding Competencies as a Shift in Educational Practices in British Columbia.

I am asking for your participation because of your experience as an educational leader in your school and with the district. Participation in this study would involve six working group sessions with up to twelve other educational leaders to co-construct an understanding of competencies and to support school-based colleagues with learning, teaching and assessing practices using competencies. A summary of the research questions and the proposed focus of each session is listed on page 2. Each session will be 60 to 90 minutes in length. The tentative proposed dates and times are: May 3, May 17, May 31, June 14, June 28, and July 5 from 3:30-5:00 pm. The working session location(s) will depend on availability of space in schools or district offices. The working group sessions will be audio and/or video recorded so I can transcribe the information to identify key themes to share back with the group for us to consider in subsequent sessions. You are free to participate to the degree you are comfortable and you may ask to have the recorder turned off at any time. All participants will receive an executive summary of the study’s findings after each session and at the end of the study.

If you are willing to take part in this study, please complete the attached consent form by the April 26, 2017 and return it by email to . Participation in this study is voluntary; there is no expectation for you to feel obliged to participate and no penalty will accrue as a result of not participating. There is minimal risk involved in participating in this study. Each participant and school will be given a pseudonym and all identifying information will be removed from the written transcripts, direct quotations, dissertation, and the presentation of the results, unless participants, at the conclusion of the study, specifically request to have their comments attributed to their name. You may withdraw from this study for any reason, at any time, without penalty. If you decide to withdraw (by e-mail, by letter or by phone), your contributions to the data collected may be withdrawn at your request.

If you have any questions concerning this study, please feel free to contact either me or my research supervisor, Dr. Alison Taylor at any time. Thank you for your time and consideration.

Sincerely,

Karina Younk

April 18, 2017
Appendix C: Letter of Invitation, page 2

Summary of Proposed Research: Competencies as a Shift in Educational Practices
Researcher: Karina Younk
Principal Investigator: Dr. Alison Taylor, UBC

Rationale
In our school district educators from kindergarten through grade 9, and soon grades 10 to 12, are working with the redesigned curriculum, the BC Education Plan and the Ministry of Education’s Interim Guidelines for Student Reporting. This research aims to bring together a group of up to twelve educational leaders to collaboratively develop our district vision of competencies and the support tools and models that will help educators move forward with our district vision. In this working group, we will be informing our practice and supporting colleagues in our respective schools to develop a collective understanding of competencies. As a principal and an educational doctorate candidate with Dr. Alison Taylor at UBC, I expect to be learning and researching along with colleagues involved in this project.

Research Questions
1. How can we, as educational leaders, work together to co-construct our understanding of competencies?
2. What tools and models are we, as educational leaders, accessing and creating to support our school colleagues with co-constructing their understanding of competencies?
3. How are we, as educational leaders, using contradictions and resistance as we work with colleagues in our schools to develop new insights about competencies?
4. How do we, as educational leaders, perceive this focus on competencies to be shifting teaching, learning, and assessment practices in our district?

Proposed Focus of Working Group Sessions
Session 1 – Questioning and Defining: What is our broad vision of competencies? Based on our experiences in our respective schools, what tools and supports do we need to actuate our vision? In Session 1, we will also establish our working group protocols.

Session 2 – Comparing past and present: What are the challenges we face as we move to a redesigned curriculum and new reporting practices?

Session 3 – Exploring new solutions/new models: What models and tools are emerging in our schools as we work with teaching, learning and assessing using competencies?

Session 4 – Exploring resistance and innovation: What interesting and innovative ideas are emerging in our schools? What are the contradictions between the barriers and benefits encountered as schools shift to the redesigned curriculum and its focus on competencies?

Session 5 – Aligning with other groups: How are partner groups (parents, community groups, grade 10-12 secondary teachers, and post-secondary institutions) adapting to these changes? What do we need to consider in sharing our models and tools with partners at other levels?

Session 6 – Sharing our findings: Did we miss any ideas? How will we share our findings?

April 18, 2017

Page 2
Appendix D: Participant Consent Form

Consort Form

You are invited to participate in a study entitled: Understanding Competencies as a Shift in Educational Practices in British Columbia. If, after carefully reading this consent form and asking any questions you may have, you decide you are interested in participating, please sign the bottom of this form to indicate your interest. Please return the signed form by email to the student researcher, Karina Younk at...

Student Researcher: Karina Younk, Educational Doctoral Candidate with the University of British Columbia

Contact information:

Purpose and Procedure: If you accept to participate in this study, you are asked to commit to six working group sessions of 60-90 minutes each where the focus will be to explore the following research questions with other educational leaders:
1. How can we, as educational leaders, work together to co-construct our understanding of competencies?
2. What tools and models are we, as educational leaders, accessing and creating to support our school colleagues with co-constructing their understanding of competencies?
3. How are we, as educational leaders, using contradictions and resistance as we work with colleagues in our schools to develop new insights about competencies?
4. How do we, as educational leaders perceive, this focus on competencies to be shifting teaching, learning, and assessment practices in our district?

Potential Risks: There is minimal anticipated risk associated with your participation in this study. All participants are educational leaders supporting colleagues in schools. As such, you may be identifiable to colleagues in the district on the basis of what you, as a participant, choose to share. Your participation in this study is voluntary and the confidentiality of those who choose to participate in the study is assured in the presentation of the study’s results. Pseudonyms will be used to represent the school district and participants’ names. There is no deception intended in this study.

Voluntary Participation: There is no expectation for you to feel obliged to participate in the study; your participation is voluntary. No penalty will accrue as a result of choosing not to participate in this study. No information will be used in the study that will identify a particular research participant. The student researcher, Karina Younk, will restate this ethical promise at the beginning of each working group session.

Potential Benefits: The expected benefits of this study are that, as participating educational leaders, you will be able to support colleagues in your respective schools as well as the district with developing a locally constructed vision and support tools and models for shifting teaching, learning, and assessment practices with a focus on competencies. Research participants and the School District Superintendent will be given an executive summary of the research results and will receive an e-mail with a link to the dissertation once the completed project is publicly available with the Department of Educational Studies of the Faculty of Education, University of British Columbia. In addition, the findings from this study results may be presented at workshops and prepared for possible publication.

Storage of Data: In accordance with UBC Policy #5 on Scholarly Integrity, an electronic version of the audio, video and transcribed data collected for this study will be kept in a locked filing cabinet in the office of the Principal Investigator, Dr. Alison Taylor's for five years. After that time, the electronic version of the data will be deleted.

April 18, 2017
Appendix D: Participant Consent Form, page 2

Transcript Review: Participants will be given the opportunity to review the final transcript and add, delete, or alter in any fashion any of the transcript’s information. Once the transcript is written, it will be sent out by email to each participant. After the study, segments of the written transcripts may be selected, with full agreement of all participants, to share the working group process with colleagues. For any other unanticipated future use of the data, individuals must be recontacted.

Confidentiality: As student researcher and co-participant, Karina Younk will have direct contact with all working group participants. Prior to the start of each working session, participants will be reminded of confidentiality expectations and the consent form to ensure continued interest in participating in this study. During the sessions, participants may request to review segments of the audio/video recordings collected during a previous session to inform the next stage in their discussions. Within these working group sessions, it is not possible to guarantee confidentiality between you and other participants as you will share information based on your experiences and information from your respective schools. However, if participants reveal information during the working group session they wish to withdraw, that information will be deleted from the study and participants will be expected to honour this request. The privacy of participants will be further be protected in two ways.
- Your consent form and any data linking your name as a participant will be securely stored in a separate location from the transcript data by the researcher, Karina Younk.
- Each participant and school will be given a pseudonym and all identifying information will be removed from the written transcripts, direct quotations, dissertation, and the presentation of the results, unless participants, at the conclusion of the study, specifically request to have their comments attributed to their name.

Right to Withdraw: You may withdraw from the study (notification by e-mail, letter or phone) for any reason, at any time, without penalty of any sort. You may withdraw without loss of any entitlements. If you withdraw from the study at any time, any data that you have contributed will be destroyed at your request. As the audio/video recordings include all participants, these will not be deleted until the conclusion of the study. However, your contributions will be deleted from the transcriptions and will not be used in subsequent working group sessions.

Questions: If you have any questions concerning the study, please feel free to contact the researcher, Karina Younk at any point. You are also free to contact Dr. Allison Taylor, the research supervisor and principal investigator, (see contact information on page 1), if you have questions at a later time. If you have any concerns or complaints about your rights as a research participant and/or your experiences while participating in this study, contact the Research Participant Complaint Line in the UBC Office of Research Ethics.

Consent to Participate: I have read and understand the description provided above. I have been provided with an opportunity to ask questions and my questions have been answered satisfactorily. By signing below, I consent to participate in the study understanding that I may withdraw this consent at any time. A copy of this consent form has been given to me for my records.

(Signature of Participant)

(Date: )

(Name of Participant – Please print clearly)

Karina Younk,
Principal with Nanaimo Ladysmith Public Schools
Educational Doctorate Candidate with UBC

April 18, 2017
Appendix E: Focus Questions for Working Session #2 based on Session 1

**How have past/present experiences shaped our beliefs about learners and learning?**
- Learners are actively engaged, empowered and involved in shaping their learning throughout their lives with passion, purpose, and options.
- Learners are navigating personal paths with intention to define personal and cultural identity.
- Learners are able to self-assess: What are my gifts? Stretches? Goals and next steps?
- Learners are adaptable, resilient and present.
- Learners have a personal, articulated, and sustainable world view
- Learners have personal and community metacognition, passion, dreams, and goals.
- Learners know when to do something, where to do it, how and why they are doing it, and do it in a way that supports or ignites others’ learning.
- What is the purpose of schooling within our vision of learning?

**How have past/present experiences shaped our beliefs and understandings about teaching practices?**
- How do we shift or flip our practices to become more constructivist facilitators of learning?
- What does it mean to learn with kids rather than teach to kids?
- What practices, structures, models are in the way and have to be dropped or changed? What will replace them? What evidence do we have that emergent practices are better for learning?
- How do we balance process, skills, knowledge, abilities, and content in our teaching?

**How have past/present experiences shaped our beliefs and understandings about assessment?**
- When do we focus on self-assessment; when do we focus on assessment by others?
- Assessment for, as, of learning… Is that applicable to assessment for, as, of competencies?
- What drives our assessment practices? Relevance, authenticity, purpose, next steps?
- What are we valuing when we assess competencies and learning? How is this different?
- How do we make it safe to take risks, to be vulnerable, to step out of our comfort zone and to lean on and learn with others and to let go of a need to be in control?
- What might we need to unlearn and then relearn in new and authentic ways?
- How are we scaffolding for success? How are we measuring success?

**How have past/present experiences shaped our beliefs and understandings about competencies?**
- How do we move our collective understanding of competencies from a hidden curriculum and confusing expectations to something that is visible and explicit, but also personal and diverse?
- Do we view core and curricular competencies as separate or integrated?
- How do we define thinking, personal, social and communication competencies? How does metacognition fit? How can reconciliation support a new conception of learning?
- How do we honour individual and community diversity through competencies?
- How do we work through potential barriers like poverty, anxiety, apathy, mental health?
### Appendix F: Condensed Sample of Executive Summary from Session 1

#### 2017/05/10 Activity Theory Framework and Exemplars from Session 1

<table>
<thead>
<tr>
<th>Nodes of the Activity Theory Framework</th>
<th>Exemplars of words, phrases, ideas emerging from Session 1</th>
</tr>
</thead>
</table>
| Subjects (Contradictions, Experiences shape our direction) | Teaching, learning and assessment practices  
“We are ALL learners learning together.”  
- Educators (teachers, coordinators, principals/vice-principals, district staff, support staff)  
- Students, families, caregivers, community partners |
| Objects, Motives, Visions | Focus on learners and learning:  
- Who do we envision our citizens of the future to be? What core competencies are needed?  
- Educators are helping and facilitating learners to grow and emerge and develop in who they are and then proudly watching as learners’ passions, dreams, goals, choices ripple throughout the cultures in which they are embedded.  
- How do we create and sustain relevant, engaging, challenging curriculum for a whole class? |
| Mediating Instruments, Tools, Supports | Focus on core (and curricular) competencies  
- focusing on process and how we shape our questions: teaching a way of thinking, a way to be, helping you to understand something about yourself, your culture, your identity, your skills and your areas of growth  
- smooth transition: baby steps, next steps, time to reflect and to discuss or write, balancing, reassuring, differentiating for discomfort-comfort, resistance-relief, vulnerability-experimenting and experiencing, addressing gaps in understanding and intentions, creating safe spaces  
- What’s the measure of success for that student? For that teacher? |
| Rules and Structures | Focus on curriculum, assessment and organizational structures that:  
- have the learners’ personal development and identity as the focus  
Examine and question societal dynamics and practices of power:  
- shifting roles and paradigms with focus on competencies continuum: teachers/students, child/adult, master/apprentice, expert/beginner… |
| Community, Culture and Multiple Voices | Focus on understandings, history, culture, relationships  
- honour and celebrate diversity and differences in multiple ways to value, ways to create, ways to think, ways to be, ways to understand yourself, your culture, your identity, your skills… |
| Division of Labour, Roles and Responsibilities | Focus on facilitating learning communities/organizations/systems:  
- senior staff and coordinators (district leadership for implementation, training, workshops, planning)  
Focus on roles & responsibilities  
- expanding our personal and organizational professional practices… |
# Appendix G: Sample of Initial Data Sort Using the Activity Theory Framework

## Labeling Key
- Motives, Visions, Objects of our Activity
- Mediating Instruments, Tools, Supports
- Community, Culture, Multiple Voices
- Rules, Structures
- Division of Labour, Roles and Responsibilities
- Stories as Evidence
- Contradictions that stimulate, activate changes

| Motives, Visions, Objects of our Activity | Better curriculum integration  
Who do we envision as our citizens in the future? 
Their thinking skills  
“What’s your vision?”  
Actively involved, sense of ownership  
In the core competencies... that's where I see there is change  
Start visioning what those core competencies are and how can we support teachers with that  
It’s involving students in that process and it is back to that metacognitive aspect of thinking about, “Who am I as a learner? What are my gifts? What are my stretches?”  
Helping them to grow and emerge and develop in who they are and then watching the resulting ripples throughout the culture that they're embedded within  
“What would you like to do?” in terms of a vision of where you would like to go.  
Individually, there is this idea of learning and the change that you'd like to see. Well, if these are our individual visions, there are some commonalities here that we'd like to work on  
What would you want to work towards? Because that's where we put our energy.  
The ultimate vision would be that all staff and students have clarity … |
Appendix H: Historical, Present and Future Layers of Activity Theory Data
Appendix I: Sample of Coding Chart for the Subject Node (Sessions 1, 2, 3)

Concepts from Working Group Sessions, Interview and Email, May-June 2017
Session 1 – May 10, Session 2 – May 31, Emails May 22, 29, 31, Interview 2c – June 9, Session 3 – June 14, Session 3c (alternate session) – June 26

**Subjects**

<table>
<thead>
<tr>
<th>Empowering Emotions</th>
<th>Restraining Emotions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of ownership 1.2, 9</td>
<td>Control, management 1.8, 9, 2.13</td>
</tr>
<tr>
<td>Excitement 1.9, 10, 11</td>
<td>- Uncertainty, fear, anxiety, terrifying, being wrong 1.6, 7, 9, 20, 2.12, 13, 15, 17, 23, 35, 2c.4, 5, 3.3, 12, 16, 3b.9, 10, 16</td>
</tr>
<tr>
<td>Individual identity and understandings 1.2, 10, 17, 2c4, 3.10</td>
<td>- Discomfort-comfort 1.12, 17, 20, 3.8, 3b.16</td>
</tr>
<tr>
<td>Confident, competent 1.5, 2.25, 38, 2c.5, 3.17</td>
<td>- Impeding 1.4</td>
</tr>
<tr>
<td>Courageous, resilient, humble, brave 1.9, 13, EM 2017-05-22-A14, 3.17, 3b25, 26</td>
<td>- Vulnerable 1.17, 21, 2.17, 3b.20</td>
</tr>
<tr>
<td>Pride 1.10, 2.14, 27, 28</td>
<td>- Gaps in knowledge, misconceptions, 1.20, 21, 2c.5</td>
</tr>
<tr>
<td>Natural curiosity 1.12</td>
<td>- Perfection, getting it ‘wrong’, expectations, 1.21, 2c.5</td>
</tr>
<tr>
<td>Engagement 1.18, 2.21, 28</td>
<td>- Frustration 1.21, 22, 2.12</td>
</tr>
<tr>
<td>Feeling safe, able to take risks 1.21, 22, 2.32, 2c.5, 3b.17, 20</td>
<td>- Confusion 3.7</td>
</tr>
<tr>
<td>Trust 2.17</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subjects’ decisions to engage and act</th>
<th>Subjects’ resistance to engage or act</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling involved in the process, choices, and examples 1.2, 5, 8, 17, 3.20, 21, 3b.1, 17</td>
<td>Apathy, tell us what to do 1.6, 12, 2.12</td>
</tr>
<tr>
<td>Honouring diversity 1.7, 2.23, 2c.4</td>
<td>“Not ready; not trained” 1.10, 3b.16, 17</td>
</tr>
<tr>
<td>Cultural choices/processes 3.21</td>
<td>Self-esteem “Not good at school” 1.17, 18, 2.23</td>
</tr>
<tr>
<td>Researching, questioning, conversing 1.5, 9, 13, 14, 17, 20, 2.19, 28</td>
<td>“Too hard, too much work”, overwhelmed 1.21, 2.12, 2c.4, 3b.11, 17</td>
</tr>
<tr>
<td>Discomfort, creative destruction, failure 1.12, 13, 18, 2.15, 16, 32, 3b.17</td>
<td>Stay in safe, comfort zone 2.15, 23, 24, 32, 34</td>
</tr>
<tr>
<td>Passion, energy, innovation 1.7, 2.17, 23, 24, 38, 3.14, 3b.2, 7, 11</td>
<td>Beliefs (isolation) 2.18</td>
</tr>
<tr>
<td>Successful experiences, relief 1.20, 21, 22, 2.33, 39, 3b.9</td>
<td>Worth/value is limited/defined by numbers, grades, comparisons, competitions with others, halo effect 2.25, 26, 27, 28, 35, 36, 39, 40</td>
</tr>
<tr>
<td>We are all learning together 1.22, 3b.2, 13, 17</td>
<td>- No boundaries or scaffolding 3b.9, 10</td>
</tr>
<tr>
<td>Release of control 1.22, 2.16, 21</td>
<td>- Access to supports, technology 3b.13</td>
</tr>
<tr>
<td>Lived experiences, philosophy/beliefs 1.20, 2.13, 24, 36, 2c.4, 3.11</td>
<td></td>
</tr>
<tr>
<td>Students’ best interests 2.17</td>
<td></td>
</tr>
</tbody>
</table>
Appendix J: Sample from my Coding Process for an Overview of the Sessions

**Mediating Instruments**

<table>
<thead>
<tr>
<th>Movement/Change Tools</th>
<th>Session 1</th>
<th>Session 2a/2b</th>
<th>Session 3a/3b</th>
<th>Session 4a/4b</th>
<th>Session 5</th>
<th>Session 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Processes</td>
<td>1.3, 7, 8, 10, 2a.21, 32, 3b.14</td>
<td>3.27</td>
<td>4b.8, 24, 25, 30, 33</td>
<td>5.2, 23, 32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Treat staff like students, moving to competency self-assessment</td>
<td></td>
<td></td>
<td>3a.22, 3b.12</td>
<td>4b.10, 11, 12, 13, 14, 15, 27</td>
<td>5.9, 11, 23, 30, 32</td>
<td></td>
</tr>
<tr>
<td>- Unpack the shifts and changes, undo past practice, re-envision</td>
<td></td>
<td></td>
<td></td>
<td>4a.10, 12, 13, 4b.12, 30</td>
<td>5.7, 9, 11, 30, 31, 32, 33, 34</td>
<td>6.13</td>
</tr>
<tr>
<td>- Facilitating, leading, supportive, effective, efficient, innovative mentors &amp; practices</td>
<td>1.6, 9, 20, 2a.13, 17, 19, 2b.5, 3a.11, 13, 22, 3b.12</td>
<td>3a.17, 3b.14, 21</td>
<td>4b.32</td>
<td>5.3</td>
<td>6.22</td>
<td></td>
</tr>
<tr>
<td>- Questioning, inquiry, expansive, open-ended projects</td>
<td>1.7, 10, 2a.10, 14, 17, 18, 19, 3b.7, 11</td>
<td></td>
<td>4b.12</td>
<td>5.7, 11, 16, 30, 20, 21, 22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Project-based, hands-on experiences, Aboriginal pedagogy</td>
<td>2a.14, 17, 18, 27, 2b.2, 3a.17, 3b.14, 21</td>
<td>3a.3, 27, 3b.10, 11</td>
<td></td>
<td>5.32, 33, 34, 6.22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Lesson/unit scaffolding, strategic, breaking down</td>
<td>2.16, 21, 3a.3, 27, 3b.10, 11</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Calls to action, reconciliation</td>
<td>1.8, 2b.1, 3a.10</td>
<td>4a.20</td>
<td></td>
<td>6.4, 14</td>
<td></td>
<td></td>
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<tr>
<td>- Collaboration</td>
<td>1.11, 2a.19, 2b.2, 3a.17, 3b.12, 14</td>
<td>4b.9, 14, 23</td>
<td>5.11, 30, 31, 35</td>
<td>6.16</td>
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<tr>
<td>- Sharing resources</td>
<td></td>
<td>3a.13, 3b.14, 21</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>- Differentiating, identifying gifts and skill sets</td>
<td>1.18, 19, 2a.12, 2c.2, 3.17, 3b.10</td>
<td>4a.12, 13, 4b.8, 5.16, 29</td>
<td>6.16, 21, 22</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>- Understanding criteria...</td>
<td>1.22, 24, 2a.13, 20, 4b.29</td>
<td>4a.20, 5.5, 16, 23, 29</td>
<td></td>
<td>6.16</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix K: Cover Letter for Executive Summary of Sessions 1, 2, and 3

Friday, July 21, 2017 (revised August 30, 2017)
Dear Colleagues,

When you accepted my invitation to join this working group to examine how our understandings of competencies might be shifting teaching, learning and assessment practices in our district, I indicated I would summarize contributions from our previous sessions before each new session. The chart I sent you after our second session was a summary of my interpretations of the ideas shared in Sessions 1 and 2. While the chart provided insight into a systemic overview of changes in our district, it failed to show your individual voices. In an effort to bring your voices to the fore and to illustrate how our actions, questions, and interactions with colleagues are shifting the practices in our district, I am using a different approach in preparation for our September session by asking you to consider these areas:

1. What themes resonate most for you at this point in our journey? What are the next-steps you are aiming for in the fall in relation to competencies and the redesigned curriculum? Why are these next steps important to you? What might be challenging as you move forward?

2. How might the ideas we discussed in our previous sessions help us expand our understandings when we are working with others? The themes listed in Section 1 (p. 2-7) speak to the tensions, contradictions, and excitement we have described and will continue to consider in session 4.

3. In Section 2 (p. 8-27), I summarize our first three sessions using quotes from your contributions. As some of you were not able to attend all of the sessions, these comments will add context to the themes in Section 1 (for example, I explore our assessment debate in Rules, p. 21-23).

I invite you to read the comments in both Sections 1 and 2 to reflect on whether the written words reflect your spoken intent. These comments begin to shape how we might share our statements in more public realms, with our colleagues, our district, and, eventually, through my dissertation. I welcome your suggestions on how I could perhaps organize the comments differently to be more meaningful both to you and to a broader public. Please use the ‘track changes’ option to make changes to this document and return any suggestions to me via email.

I was looking at possible dates for our next sessions. Could you let me know if these dates work?

- Session 4 - September 29
- Session 5 - October 11
- Session 6 - November 15

I look forward to adjusting these texts with your reactions, questions, and suggestions. I trust you have enjoyed your summer and use the time to recharge, reflect, and spend time connecting with family, friends and special places. Thank you for your incredible contributions to this research. As I have mentioned before, it is an honour to be doing this work with each of you. I look forward to our next steps together and to receiving your feedback!

Karina
Appendix L: Reference for Quotations Shared in August 2017 Summary

**Distribution of your comments in this document**
This chart makes it easier for you to locate your comments in this document. Remember some of you may not have been at a session where we focused on a particular aspect. Please also remember that I could easily have placed your comments in several sections as the ideas overlap. Finally, for each of the comments noted here, there were many, many more equally intriguing comments shared during each of the sessions.

<table>
<thead>
<tr>
<th>Name</th>
<th>Tensions in Themes</th>
<th>Concepts in Relation to Nodes of Activity Theory Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 2 3 4 5</td>
<td>Subject Object Instruments Community Rules Division of Labour</td>
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<tr>
<td>Bridget</td>
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<td>Carol</td>
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<td>Dana</td>
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<td>Y Y, Y Y Y Y Y Y Y Y</td>
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<td>Ellen</td>
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<td>Y Y</td>
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<td>Faye</td>
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<tr>
<td>Gordon</td>
<td>Y Y Y Y Y Y Y Y Y</td>
<td>Y Y Y Y Y Y, Y Y</td>
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<tr>
<td>Henry</td>
<td>Y Y Y Y Y Y Y Y Y</td>
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<td>Isaac</td>
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<tr>
<td>Janice</td>
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<tr>
<td>Karina</td>
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<tr>
<td>Lauren</td>
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<td>Marissa</td>
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<tr>
<td>Naomi</td>
<td>Y Y Y Y Y Y Y Y Y</td>
<td>Y Y Y Y</td>
</tr>
</tbody>
</table>
Appendix M: Final Session and Feedback Request with Sample Responses

1. Hi Karina - how interesting to read through my comments! Thank you for sharing these with me (makes me realize I can have some neat ideas on occasion!). Everything looks great, and I’m ok with you using any or all of them. :) Looking forward to reading the next piece! I read over the comments, and they look fine to me.
2. You have my permission to use any data acquired during your research associated with me in your doctoral thesis. Please let me know if you are in need of anything further.
3. I re-read my comments – looks like I talk a lot! No edits from me though. Carry on.

From: Karina  
Sent: Tuesday, June 19, 2018 5:01 PM  
To: [Participant]  
Subject: Closing comments...

Hi [Participant’s Name],
I am finally able to return to work on this research. I wanted to give you an opportunity to add any closing thoughts (see the questions below from our last session). I am also enclosing the comments from previous sessions that I would like to use in the dissertation. If you could take a moment to read them and to ensure there are no accidental identifiers (school names are removed already).
I would like to be able to share my dissertation soon with everyone, but wanted to ensure individual comments were checked first.
Karina

Subject: Competencies Research Group - Final session  
When: Wednesday, November 15, 2017 3:30 PM-5:00 PM  
Where: Karina’s Place

Hello everyone,
When we began this journey, the purpose of the final session was to:
- Share and celebrate successes in your worksites up to now in relation to understanding competencies as a shift in educational practices
- Share your visions, goals and actions in your worksites and with the district
  - Where would you like to be by June 2018?
  - What recommendations would you have for your colleagues or other sites who are also experiencing these changes?)
- Could you share your key ‘take-away’ from this working group experience?
  - What recommendations would you have for me as I compile the findings of this study?
  - Was this time together of benefit to you? In what ways?
- Have we missed anything?
I look forward to this session and being able to celebrate with you! If you are not able to attend, your written feedback is appreciated.
Karina
Appendix N: Expansive Learning Matrix with CHAT Principles

Engeström (2001) proposed a matrix to assist with the systemic analysis of data from formative intervention discourse by asking, “Who is doing the learning? Why do they learn? What do they learn? How do they learn?” Engeström considered each question in relation to the five principles of activity theory: 1) the activity system as the unit of analysis, 2) multi-voicedness, 3) historicity, 4) contradictions, and 5) expansive cycles.

To experiment with Engeström’s matrix, I constructed a matrix of my research questions in relation to these five principles of activity theory.

Table 13
Expansive Learning Matrix with CHAT Principles

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Activity System</th>
<th>Multi-voicedness (Needs)</th>
<th>Historicity (Double-bind)</th>
<th>Contradictions (Resistance)</th>
<th>Expansive Cycles (Stabilizing)</th>
</tr>
</thead>
<tbody>
<tr>
<td>How are educational leaders co-constructing understandings of competencies?</td>
<td>District is the unit of analysis –  The district’s definition of competencies</td>
<td>Participants bring varied experiences from school communities</td>
<td>What no longer works? What needs to change?</td>
<td>Leaders are learning while leading school colleagues and working with students</td>
<td>Desire to share contexts, experiences, and visions of learning</td>
</tr>
<tr>
<td>What tools are leaders accessing and creating to support colleagues in co-constructing understandings of competencies?</td>
<td>District is accessing Ministry of Education documents and district frameworks</td>
<td>Leaders are using UDL, NNOI, Inquiry projects, new assessment models</td>
<td>Colleagues’ frustrations Year 2000 and previous curriculum</td>
<td>Defining competencies; changing practices; personalized learning &amp; standards</td>
<td>Access supports from school, community, district PLC province; to build tools</td>
</tr>
<tr>
<td>How are leaders working with resistance from local learning communities in co-constructing understandings of competencies?</td>
<td>Data collection, training, school samples, changing policies and roles</td>
<td>Other districts’ models, experiences from schools; means to connect with parents</td>
<td>Resistance- culture and history of individual schools and community</td>
<td>Why change learning and reporting? Resistance to new models for teaching and reporting on competencies</td>
<td>Expand how others understand this new focus.</td>
</tr>
<tr>
<td>How do leaders perceive the focus on competencies to be shifting practices in their local district?</td>
<td>Systemic changes for improving learning in our district</td>
<td>Ripple effect of shared ideas &amp; contexts in visions for change</td>
<td>Compare with past models of learning; What is changing?</td>
<td>Challenges of learning together; Connecting multiple contexts</td>
<td>Feedback from community about ongoing learning</td>
</tr>
</tbody>
</table>

(Inspired from Engeström, 2001, p. 138)
Appendix O: Possible Connections in this Study for Other Contexts

To revisit Appendix N and point out the multiple connections of how this study brings together my research questions, activity theory, expansive learning, the BC curriculum focus on competencies, and our district vision, I include Table 14. This matrix speaks to the flexibility of activity theory and expansive learning as frameworks for formative intervention research in relation to how BC’s new curriculum focus on competencies is stimulating shifts to educational practices. It may stimulate ideas for future research.

Table 14
Connecting Competencies with Activity Theory and Expansive Learning

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>How do we co-construct our vision of competencies?</th>
<th>What tools are we accessing or creating?</th>
<th>How do we use contradictions with community partners to enrich learning?</th>
<th>How are we shifting our practices by engaging with competencies?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Theory Concepts</td>
<td>Participants &amp; the Object of the Activity</td>
<td>Mediating Instruments</td>
<td>Community, Rules, Roles</td>
<td>Object and Outcomes of Activity</td>
</tr>
<tr>
<td>BC Curriculum Model</td>
<td>Knowing</td>
<td>Doing</td>
<td>Understanding</td>
<td>Extending?</td>
</tr>
<tr>
<td>Personal and Social Competencies shaped by experiences</td>
<td>Engage learners’ personal and cultural identities</td>
<td>Focus on learning as a process</td>
<td>Envision competencies as a systemic change</td>
<td>Honour local collaborative learning communities</td>
</tr>
<tr>
<td>Critical and creative thinking competencies shaped by access to knowledge</td>
<td>Engage in collaborative practices</td>
<td>Create instruments to support learning as a process</td>
<td>Design new models for communicating competencies</td>
<td>Co-construct diverse learning paths</td>
</tr>
<tr>
<td>Communication competencies shaped by reflection, skills, processes</td>
<td>Include voices from intersecting communities</td>
<td>Expand assessment paths and options into communities</td>
<td>Assume collective responsibility for competencies</td>
<td>Shift systemic practices toward expanding competencies</td>
</tr>
<tr>
<td>Expansive learning journeys are co-constructed by</td>
<td>Engaged learners</td>
<td>Collaborative, creative innovators</td>
<td>Respectful, valued citizens</td>
<td>Courageous, collaborative communities</td>
</tr>
<tr>
<td>District and NOII Vision</td>
<td>Dignity</td>
<td>Options</td>
<td>Purpose</td>
<td>“Success for All”</td>
</tr>
</tbody>
</table>