A Descriptive Case Study of the Perceptions and Use of Adventist EDGE: An Initiative Developed in Response to the North American Division of Seventh-day Adventists' Document, "Journey to Excellence"

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ABSTRACT

A DESCRIPTIVE CASE STUDY OF THE PERCEPTIONS AND USE OF ADVENTIST EDGE: AN INITIATIVE DEVELOPED IN RESPONSE TO THE NORTH AMERICAN DIVISION OF SEVENTH-DAY ADVENTISTS’ DOCUMENT, JOURNEY TO EXCELLENCE

by

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Title: A DESCRIPTIVE CASE STUDY OF THE PERCEPTIONS AND USE OF ADVENTIST EDGE: AN INITIATIVE DEVELOPED IN RESPONSE TO THE NORTH AMERICAN DIVISION OF SEVENTH-DAY ADVENTISTS’ DOCUMENT, Journey to Excellence

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Problem

The Southern Union started the Adventist EDGE initiative as an action plan in response to the North American Division’s document, Journey to Excellence. The Adventist EDGE became a comprehensive educational reform initiative. However, there were different ideas on how the innovation should look when in action in the schools, and these differences became obvious during the initial EDGE school validation visit, resulting in hurt feelings and confusion. Thus, the need for my study to clarify EDGE became critical for the survival of the initiative.

Purpose

The purpose of my study was to develop two operational definitions or Innovation Configurations for the Adventist EDGE teacher and the Adventist EDGE School. This
would identify the core components of the Adventist EDGE and provide descriptions of behaviors ranging from Ideal to Unacceptable within each component.

Method

My study was a qualitative case study, specifically an Innovation Configuration study. It involved eight states in the Southeast that make up the Southern Union Conference of Seventh-day Adventists. There were 42 participants from the eight conferences within the Southern Union Conference representing 20 developers, seven expert users, and 12 users of various levels of use, which included representation of all grade-level teachers K through 12.

Results

Two operational definitions or Innovation Configurations were developed, one was for the EDGE Teacher, and the other was for the EDGE School. Key components were identified for both the teacher and the school. The teacher Innovation Configuration has six core components. Under each component are several elements with a continuum of behaviors grouped into three categories: ideal, acceptable, and unacceptable. The school Innovation Configuration has five core components. Under each of those components are several elements with a continuum of behaviors grouped into four categories: ideal, progressing, emerging, and unacceptable. These two innovations define behaviors present in an Adventist EDGE School or Adventist EDGE Teacher.

Conclusions

Prior to my study, the Southern Union had no clear definition of specific behaviors for the Adventist EDGE School or Adventist EDGE Teacher. Everyone had his
or her own ideas of what EDGE should and should not look like. Using the Innovation Configuration Tool from the Concerns-Based Adoption Model helped to unify the Southern Union Developers of Adventist EDGE. Through a collaborative process, it clarified what an Adventist EDGE Teacher and an Adventist EDGE School looks like when implemented in the classroom or school. The development of the Adventist EDGE Innovation Configuration–Teacher Components and the Adventist EDGE Innovation Configuration–School Components has helped to pull the different viewpoints and ideas of everyone into a focused picture where key players have all agreed. These two Innovation Configurations now provide direction, increasing the chances of sustaining the Adventist EDGE initiative.

This study provides a baseline for a host of further studies. Some of those studies might include developing the Innovation Configurations for the conference and union levels. Conducting a comparison study between a typical, good Seventh-day Adventist school and an Adventist EDGE School of Excellence could help determine if the EDGE program is making a difference. Conducting longitudinal studies of student achievement in Adventist EDGE Schools of Excellence and determining if the Adventist EDGE is meeting the needs of Seventh-day Adventist education for the 21st century as outlined in the North American Division’s Journey to Excellence are just a few of the studies that can now be conducted.
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A Dissertation
Presented in Partial Fulfillment
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CHAPTER I

INTRODUCTION

Background of the Problem

In the late 1990s, the Southern Union Conference\(^1\) of the Seventh-day Adventist Education Council asked a committee to study authentic assessment methods and make recommendations for accurately determining what students know and what they can do. As the committee labored over various types of assessments, it became apparent that curriculum and instruction were inseparable parts of the complete picture. Thus, after several months the committee became the Curriculum, Instruction, and Assessment Committee (CIAC).

As CIAC met and studied, much debate and discussion took place. Taking the chapter on “Complexity and the Change Process” from Michael Fullan’s (1999) book, *Change Forces: The Sequel* as the reference point and guide for breaking out of the typical mind-set, those of us on the CIAC began a journey together. As we reported our discussions with the Education Council, others joined the CIAC, which broadened our concepts, and thus we gathered momentum. As a plan began to formulate, Ambrose’s (1987) *Managing Complex Change* (see Appendix A) matrix was considered to help ensure success. The plan involved curriculum, instruction, and assessment; training and

\(^1\)The Seventh-day Adventist system is a world-wide church system. The General Conference is the world headquarters and is located in Silver Spring, Maryland. The world regions divide into 13 divisions, one of which is the North American Division. Each division is further divided into unions with nine unions being represented in the North American Division. The Southern Union is one of those nine unions in the North American Division.

http://www.adventist.org/world_headquarters/
on-going staff development; parent and board training; partnerships with stakeholders; administrative leadership and development; servant leadership; invitational education; technology; and funding. We took a long, hard look at the *Journey to Excellence* document produced by the North American Division Curriculum Futures Commission (North American Division of Seventh-day Adventists, Office of Education, 1997). We determined to develop an action plan to include the elements outlined in that document because we believed it was what Adventist education needed for the 21st century. Thus, Adventist Educators Delivering Great Education (Adventist EDGE or EDGE) was born and the Southern Union Conference of Seventh-day Adventists (Southern Union) began an on-going journey to excellence for Adventist education in the 21st century.

In May of 2004, under the direction of a marketing consultant, every conference in the Southern Union facilitated an initial kick-off for Adventist EDGE at respective area meetings (see Appendix B). A professionally prepared video and display booths were set up to expose the constituents to the idea of Adventist EDGE. Thus, the Southern Union began sharing the concepts of Adventist EDGE with its constituents. However, questions and discrepancies regarding EDGE became more and more noticeable when sharing EDGE in conversations or in efforts to determine the actual implementation of EDGE. The program needed further defining so others could effectively understand. We needed a concise, detailed description—an operational definition, which would include a clear depiction of the EDGE components including a continuum of behaviors from ideal to unacceptable when implemented in the classroom or school.
Statement of the Problem

The initial implementation of EDGE involved creating on-going staff development programs in the eight conferences of the Southern Union. This included a focus on two specific things: (a) standardized testing and authentic assessment, and (b) teachers receiving 4MAT training, a framework for delivering instruction according to the natural cycle of learning (Southern Union Conference of Seventh-day Adventists, Office of Education, 2006). Pilot areas implemented authentic assessment and 4MAT instruction. As the EDGE initiative progressed, teachers and administrators provided additional perceptions of the emerging concept. These concepts included invitational education, use of technology, stakeholder buy-in, and funding.

As the Southern Union began applying the Adventist EDGE program with trained teachers, a major problem began to surface. The initiative so varied from school to school, classroom to classroom, and teacher to teacher, it became increasingly difficult to describe. Furthermore, the initiative was growing conceptually, which broadened the range of differences. For example, in one conference, some perceived that a particular school met the qualifications for an Adventist EDGE School. The school looked at the handbook, conferred with their superintendent, and applied to the Southern Union for EDGE recognition. This was the first school to apply, and representatives from several conferences and the Southern Union Education Office, including the EDGE Marketing Consultant, visited the school to decide whether the school had met the requirements and could receive recognition as an official Adventist EDGE School of Excellence. That visit turned out to be a painful situation for everyone because each came to the table with a
different perception of what the Adventist EDGE initiative should actually look like when implemented.

For example, one of the components listed in the handbook was Instruction. Listed under instruction were the headings of 4MAT, Cooperative Learning, and Other Research-based Strategies. While there were explanations under each category, there were no descriptions for what it should look like when implemented in a classroom or school setting. Therefore, while each person participating in the visit was well aware of what was in the handbook, each was working with his or her own perceptions of what EDGE should look like in actual implementation. Questions emerged such as, Did every teacher in the school have to be using 4MAT? If not, who would be using 4MAT? Who would not be using 4MAT? How often would those teachers be using 4MAT? There were a variety of opinions on what the correct answer really would be and the group struggled to reach an agreement. The event ended up causing perplexed feelings both at that school and out in the field. The school did not receive approval for official recognition on that visit (see Appendix C).

I likened this experience to a group of people receiving a document explaining that a bouquet of flowers consists of flowers. Next, they are to go out and create bouquets. Believing everyone’s creation will look almost the same is unrealistic even though the document can be quite clear about the components that make up the bouquet. For example, the arrangement has flowers, a vase, and trimmings. However, unless the different variations of these components, such as kinds of flowers, number of flowers, size, colors, kind of vase, size of vase, color of vase, and so forth, are clear, each person’s mental picture of their bouquet will differ. The ability for anyone to describe ahead of
time how the different bouquets might look is virtually impossible. When we take the
time to determine what variations exist and which ones are acceptable, we can have an
open discussion about what a bouquet should look like by identifying how the different
numbers of flowers, kinds of flowers, sizes of vase, and so forth, fit or do not fit into the
operational definition for the bouquet of flowers.

The problem with the EDGE concept was like the bouquets of flowers. The
Southern Union needed to know what the EDGE elements should look like when
implemented in a school or classroom setting. Not only did we need to know what EDGE
looked like when implemented, we needed to know specifically what the variations of
behavior would look like in an ideal setting, an acceptable setting, and an unacceptable
setting. The questions to answer were many. What would a school or teacher be doing
and what would it look like when implementing the EDGE? How would the Southern
Union determine who received recognition for implementing the EDGE? How could we
explain to our customers the Adventist EDGE? What would we measure to determine if
the Adventist EDGE initiative was making a difference?

In response to the experience of the first school that applied for the EDGE
recognition, I realized the critical need for a working definition for Adventist EDGE. The
problem of how to operationally describe the Adventist EDGE and depict acceptable and
unacceptable levels of use in classrooms and schools was essential and critical for the
survival of the Adventist EDGE. The problem was obvious, and the purpose for my study
became clear.
**Purpose of the Study**

The purpose of my study was to establish a working definition that would operationally describe the elements present in the Adventist EDGE initiative. This would provide information needed to communicate more concisely about the Adventist EDGE. It would clear up the ambiguity and provide clear descriptions of EDGE for educators, customers, and supporters. The study would establish acceptable and unacceptable variations of teacher use in classrooms, clarifying and classifying the wide range of differences when implementing the EDGE initiative. My study would help unify the Southern Union’s concept of Adventist EDGE and provide information needed for determining recognitions such as certificates, rewards, and merit pay. The study would help strategic marketing plans and promotions of the Adventist EDGE initiative. After identifying the purpose for the study, I developed the research questions.

**Research Questions**

I used the following questions to guide my study. Each set of questions applied to both the Adventist EDGE Teacher and for the Adventist EDGE School. These answers establish separate operational definitions, or Innovation Configurations, for the EDGE Teacher and the EDGE School.

1. What elements must be present to be an Adventist EDGE classroom/school?
2. What are the core components of the Adventist EDGE teacher/school?
3. Within each component, what is the continuum of behaviors from ideal to unacceptable?
**Research, Observation, and Philosophy**

From its inception, the administrators and developers of the Adventist EDGE initiative desired to base decisions on valid research. We studied and restudied many ideas and learning theories as the EDGE began to take shape. Especially considered were ideas and theories of learning on how the brain functions when assimilating information (Ellis, 2005; Johnson & Johnson, 2006; Joyce, Weil, & Calhoun, 2011; McCarthy, 2000; North American Division of Seventh-day Adventists, Office of Education, 1997). Our research, observation, and discussion of philosophy led to implications for the classroom and, finally, the formation of the Adventist EDGE initiative. The next few paragraphs share some of our thinking and experience.

Johnson and Johnson and Spencer Kagan identified Cooperative Learning as the most effective way we learn (Joyce et al., 2011). Slavin synthesized the research on cooperative learning with four main conclusions: (a) group goals and individual accountability provide the most successful approaches for student achievement; (b) clear group goals and individual accountability consistently produce positive effects; (c) the positive effects are consistently and equally effective from Grades 2-12, in all subject areas, and with high, medium, and low achievers; and (d) there are documented consistent positive effects for outcomes such as self-esteem, intergroup relations, acceptance of handicapped, attitudes towards school, and the ability to work with others (Ellis, 2005). Spencer Kagan provided a structural approach to cooperative learning with “content-free” methods to organize social learning in the classroom (Kagan & Kagan, 2008). These included structures such as Round Robin, Numbered Heads, Pairs, Pairs Check, and Corners. David Johnson and Roger Johnson (1988) emphasized processes for
learning together through formal, informal, and cooperative groups at all levels and disciplines.

In *Models of Teaching*, Bruce Joyce, Marsha Weil, and Emily Calhoun (2011) raised the understanding of teachers by teaching them to implement strategies and structures effectively at the classroom level. Bruce Joyce and Beverly Showers (2002) promoted teacher coaching in staff development to increase student achievement. They found that peer coaching not only assists with the effective transfer of knowledge, it also facilitates the development of more sharing and experimenting between teachers and administrators.

Rita Henriquez-Roark (1995) researched teacher study groups in the Adventist system and found it to be a necessary structure for implementing effective change in the classroom. She implemented teacher study groups in parts of the Southern Union from 1990-1998 and was instrumental in the perpetuation of the study groups. Finally, the Southern Union officially recommended study groups as a method for staff development (see Appendix D).

In the early 1900s, John Dewey emphasized the importance of human experience in the learning process. Dewey was a pragmatist who advocated the idea that something was true if it worked in a satisfactory manner. He accepted the things that “worked” and rejected the things that did not “work.” He believed that inquiry should not be thought of as a passive observation of the world where ones creates an idea to correspond to reality, but instead be a process which includes a determination of successful or unsuccessful action in application (Field, 2001). John Dewey’s emphasis of the importance of human experience in the learning process seemed essential.
At the heart of David Kolb’s (1984) theory was the conviction that learning is a continually recurring process as individuals refine and integrate basic ways for perceiving, thinking, acting, and feeling. Kolb said that this cyclic learning began with a concrete experience, and then progressed to an observation and reflection stage. After one observed and reflected, then abstract concepts could be formed and tested in new situations, resulting in another concrete experience. Thus, the process would repeat as a natural cycle for the mind (Kolb, 1984). Ideas from these scholars contributed to the concept and formation of the Adventist EDGE Framework.

**Forming the Adventist EDGE Framework**

By 2004, the Southern Union had initiated and recommended changes with assessment and on-going staff development through teacher study groups. Then, the 4MAT system was introduced. Bernice McCarthy, founder of About Learning, Inc. (1979), combined all the information on learning styles and brain research into a hybrid model called the 4MAT System. The 4MAT System identifies the learning needs of four basic types of learners, providing a framework for each in a natural cycle of learning (McCarthy, 2000). The Southern Union embraced the 4MAT framework because they recognized a good fit with Adventist EDGE. It supported their values, philosophical assumptions, and adopted learning theories. Although the Adventist EDGE now had a more definite shape and focus, mixed perceptions of what the Adventist EDGE should look like in action were becoming more noticeable.

**Mixed Perceptions**

As different educators and administrators began experimenting with learning and implementing the 4MAT framework, we faced a new challenge. Some believed that
4MAT was the Adventist EDGE while others assumed it was one of the pieces. 4MAT implementation did take a position in the forefront, for a time, as we undertook to train teachers and ask them to implement the 4MAT framework in at least some of their classroom instruction. At one point, the Southern Union tried to identify what they considered an official Adventist EDGE school. This resulted in a keen awareness of the different perceptions, even among the developers, about what exactly was Adventist EDGE. Indeed, we had truly reached the phenomena that Hord (1986) so graphically depicted when she illustrated what happens as a school system tries to implement a new initiative. See Figure 1. At this point, it became critical to clarify the exact nature and components of the Adventist EDGE initiative.

Figure 1. A pictorial of ways teachers operationalize innovations in their classrooms. From *A Manual for Using Innovation Configurations to Access Teacher Development Programs* (p. 15), by S. M. Hord, 1986, Austin, TX: Southwest Educational Development Laboratory. Reprinted with permission.
Packaging the Innovation

At this time, because I was one of the administrators within the Southern Union, I began implementing 4MAT into my local educational program. I learned that Bernice McCarthy (1982) had compared the Concerns-Based Adoption Model (CBAM) with the 4MAT model in an article she wrote discussing the use of 4MAT and CBAM to improve staff development. I realized both the 4MAT framework and CBAM address how a person thinks and learns. Knowing that Henriquez-Roark (1995) had used CBAM to operationally define teacher study groups, I had already begun to consider using part of the CBAM model for my study.

Conceptual Framework of CBAM

The Concerns-Based Adoption Model (CBAM) is a conceptual framework in which probable teacher concerns and behaviors in a school change process are predicted, described, and explained (Southwest Educational Development Laboratory, 2011a). CBAM has the following three diagnostic components: (a) Stages of Concern, which identifies seven different stages of feeling and perceptions teachers experience when implementing a new initiative, (b) Levels of Use, a description of eight different sets of actions and behaviors teachers move through as they progress from learning about the innovation to becoming skilled in the implementation of the initiative, and (c) the Innovation Configuration, which identifies the different behaviors of the innovation along a continuum from ideal to unacceptable.

There are several basic premises underlying CBAM. These premises include the following as outlined in Measuring Innovation Configuration: Procedures and Applications by Heck, Stiegelbauer, Hall, and Loucks (1999):
1. Change is a process, not an event.

2. The understanding of the change process in organizations requires an understanding of what happens to individuals as they are involved in change.

3. For the individual, change is a highly personal experience.

4. For the individual, change entails developmental growth in terms of feelings about and skill in using the innovation.

5. Information about the change process collected on an ongoing basis can be used to facilitate the management and implementation process.

I used the Innovation Configuration (IC) map from the Concerns-Based Adoption Model (CBAM) as a guide for operationally defining the EDGE innovation. Common uses for Innovation Configurations are research, evaluation, dissemination, and professional development. The Innovation Configuration specifically identifies the major components of the innovation. It looks at what people are actually doing, what materials they are using, and processes and behaviors exhibited while they “use” the initiative.

CBAM focuses on describing behavioral characteristics of the innovation, categorizing the varying behaviors on a continuum from ideal to unacceptable (Hord, Stiegelbauer, Hall, & George, 2006).

Using the Innovation Configuration framework to identify the core components for the Adventist EDGE initiative would provide a guideline on which to discuss and debate the ideas some held in resolute belief. The process would address the vagueness of other ideas and clarify the behaviors of the initiative until the Southern Union could reach a consensus with the ideas. The IC would first broaden the ideas to include everyone’s
perceptions. Then it would focus on clarifying or eliminating ideas to form an effective implementation tool.

Hord, Stiegelbauer, et al. (2006) liken implementation to a metaphor of a “journey across a chasm” (p. vii) where the chasm is the adoption of the new practices and their actual implementation. Because it is impossible for teachers to make the leap across the chasm, there is an implementation bridge to cross as the reform begins and changes take place. While researchers cannot measure the actual journey, they can measure many things related to the journey. The distance across the chasm from one bank to the other, the length of the bridge, number of steps and time it takes to cross the bridge, and the number of people needed to take the journey are things that can be measured. In the end, this information can help researchers see what happened on the journey, gain a better understanding of the journey, and learn how to make progress through the journey.

In implementing the Adventist EDGE, the Southern Union has repeatedly referred to the initiative as a journey. It is a process, which continues as changes in society demand different types of education. Looking at the EDGE as a process and not an event is critical to understanding and working with the success of the implementation. While the EDGE program may appear to be a decision made at the Southern Union level, the fact is that this innovation adoption is a process that each innovation user is experiencing individually.

The different educators involved with EDGE demonstrated a wide variation in their use of the innovation. They were at many places on the bridge of implementation. Therefore, I wanted to consider the issue of change in individuals in relation to the EDGE initiative and the staff development program for implementation. Patton (1982) suggests
five categories of teacher change that one might investigate as a result of implementing a new initiative. They are changes in the teachers’ feelings, opinions, knowledge, skills, and, finally, changes in teachers’ behaviors. This helped me to understand the implementation bridge for both the EDGE Teacher and the EDGE School in the Adventist EDGE journey. My research needed to consider these issues and produce a tool that would be useful for implementing the Adventist EDGE in the Southern Union.

**Significance of the Study**

My study did provide the Southern Union with guidelines to use for identifying actual Adventist EDGE teachers and schools. It laid the foundation for additional and more specific studies of the Adventist EDGE program by providing an operational definition for the Adventist EDGE. A practical configuration map is provided that enables educators and administrators to assess their own progress as they endeavor to implement the program in their classrooms and schools. I established a common ground of reference for clarification, understanding, and improvement of the Adventist EDGE.

**Assumptions**

This study assumes that the current educational system is in need of ongoing improvements. It also assumes the reader understands that learning causes a physical change in the brain before seeing any outward evidence of growth. It further assumes that when a school system claims to be undergoing a major change, the system will speak the language of an innovation, but may be reluctant in the actual practice of the initiative. Finally, it assumes the reader understands that the Southern Union accepts the Bible as the Word of God and as the highest source of written authority.
Organization of the Study Outline

In chapter 1, I discuss the formulation and definition of the problem. I provide a review of the literature in chapter 2. In chapter 3, I describe in depth the methodology and the five basic steps I used to develop the Innovation Configurations:

Step 1—identify the components as outlined by the EDGE developers through interviews and study of printed materials, that is, *Adventist EDGE Handbook* (Southern Union, 2006).

Step 2—identify additional components through interviews of trained teachers.

Step 3—refine the components and their variations through collaboration with the developers and expert users for a consensus.

Step 4—develop an Innovation Configuration map of the EDGE components and their variations.

Step 5—pilot the Innovation Configuration map with various levels of users for clarity.

Chapter 4 deals with the qualitative case study and establishes the Innovation Configuration (operational definition and the innovation components or configuration) for the EDGE Teacher and the EDGE School. It also provides the setting for the study. Chapter 5 provides conclusions and implications with recommendations for further study.

In summary, this qualitative case study, specifically an Innovation Configuration Study, is an intensive, holistic description and analysis of the Adventist EDGE initiative, describing each component, and what is the continuum of behaviors from ideal to unacceptable (Merriam, 1998). I describe the concept of Adventist EDGE in two areas: the definition and the various levels of use by the classroom EDGE Teacher, and the
definition and the various levels of use in an EDGE School. Research, such as case studies which focus on discovery, insight, and understanding from the perspectives of those being studied, offers great promise of making significant contributions to the knowledge base and practice of education (Merriam, 1998). I hope my study makes a significant contribution for the EDGE Teacher and the EDGE School.
CHAPTER II

LITERATURE REVIEW

Introduction

In determining the literature review for this research, I considered ideas of change. How might these ideas relate to an educational reform movement? I knew the Adventist EDGE initiative involved three major components: (a) curriculum, instruction, and assessment; (b) the 4MAT Model; and (c) the Study Group Model. The CBAM model’s philosophy complemented the 4MAT model, providing a natural place to begin my research. I looked at printed materials both past and present, paying special attention to how change might relate to the Adventist EDGE. I read journal articles and looked at dissertations pertaining to CBAM and the Innovation Configuration. I searched the electronic databases available through Andrews University’s James White Library using key words such as theories of change, organizational change, and individual change. The results provided a baseline for structuring my literature review.

The literature review begins with a short overview of change theory in systems and individuals. Next, I talk about the theoretical frameworks for CBAM, the 4MAT Model, and two Study Group Models. In each of the above areas, I discuss the relationships between individual change and organizational change. Then, I compare CBAM, 4MAT, and the two Study Group Models. I conclude the chapter with a short summary, connecting the Adventist EDGE initiative to these frameworks.
Change Theory in Systems and Individuals

Black and Gregersen (2008) describe change in three stages. Stage 1 is where persons do the right thing and do it well. In Stage 2, they discover the right thing is no longer the right thing and it becomes the wrong thing. A new right thing begins, but is done poorly at first because it has not been mastered. Finally, the new right thing is mastered and the cycle begins all over again (p. 13). It is at the point where the right thing becomes a wrong thing that there is difficulty. The first reaction is to deny that the right thing is now wrong. A more earnest application of the old, right thing may occur in an effort to make the old, right thing work well again (p. 21). The mental maps formed from the past successes are extremely hard to alter. Finally, there is a breakthrough, and it becomes clear that there must be a better way for the new era. The Adventist EDGE is a response to the realization that times have changed and there is a need to take the principles of Adventist education and fit them to the needs of the 21st-century family.

Theoretical Framework of CBAM

“CBAM tools have been commonly used in federally sponsored research projects, dissertation research, evaluations, and change programs” (Hord, Rutherford, Huling, & Hall, 2006, p. 2). The development of the CBAM materials occurred from the mid-1970s to the mid-1980s. A wide range of schools, organizations, and university settings have used CBAM.

The Concerns-Based Adoption Model (CBAM) addresses the issue between personal and organizational change very effectively. There are six concepts that are considered in CBAM regarding educational change (Hord, Rutherford, et al., 2006). The six concepts are: (a) we must understand that change is a process, not an event; (b)
change is accomplished by individuals; (c) change is a highly personal experience; (d) change involves developmental growth; (e) change is best understood in operational terms, that is, what it means and what effect will it have on me as an individual, and; and (f) the focus of facilitation should be on individuals, innovations, and the context.

Change Theory in CBAM

First, we understand that change is a process, not an event (Hall, George, & Rutherford, 1998). It is a process occurring over a period, usually years. It does not occur just because administration makes a decision or declares a verdict. There are basic stages of concern a person goes through with change. They are as follows:

Stage 0. Awareness: Little concern or involvement with the innovation.

Stage 1. Informational: A general awareness and interest in the innovation. There is interest in the innovation in a selfless manner such as general characteristics, effects, and requirements for use.

Stage 2. Personal: Individual is uncertain about demands of the innovation, his/her inadequacy to meet the demands, their role in the innovation, consideration of potential conflicts with existing structures and personal commitment.

Stage 3. Management: Attention is focused on the processes and use of the innovation. Dealing with issues related to efficiency, organizing, managing, scheduling, and time demands are utmost.

Stage 4. Consequence: Focuses on impact of the innovation. Looks at relevance, evaluates, and makes changes needed.

Stage 5. Collaboration: The focus is on coordination and cooperation with others regarding the innovation.
Stage 6. Refocusing: There is an exploration of more universal benefits from the innovation, including the possibility of major changes or replacement with a more powerful alternative. The individual has definite ideas about alternatives to the proposed or existing form of the innovation.

Individual Change and CBAM

“Change is accomplished by individuals” (Hord, Rutherford, Huling, & Hall, 2004, p. 6). There is a tendency to think about change in ambiguous, impersonal terms. Change affects individuals so their role in this process is vital. Change takes place in a system only when each individual, or at least most of them, implements the improved practice (Black & Gregersen, 2008; Hord et al., 2004; Quinn, 1996).

It is important to remember that change is a highly personal experience. Each individual reacts differently to the change, thus change is most successful when support is geared to the diagnosed needs of the individual users. Different responses and interventions will be required for different individuals in order to help them be successful (Hord et al., 2004).

Additionally, Heck, Stiegelbauer, Hall, and Loucks (2006) state that change involves developmental growth. Changes in individuals appear to express or demonstrate growth in terms of feelings and skills. These feelings and skills tend to change in regard to a new program or practice as the individuals pass through an ever-greater degree of experience. Hord et al. (2004) state that change is best understood in operational terms. Individuals naturally relate to change or improvement in terms of asking what it will mean to them and how it will affect them. They want to know the new demands placed
on them. They want to know how they will meet those demands, and how this will affect their work environment.

**Organizational Change and CBAM**

Change is further complicated when organizations attempt to measure an innovation without a clear determination of whether the program has been poorly or partially implemented. It is impossible to verify if a program has merit if, in fact, it has been poorly or partially implemented (Hord et al., 2004, p. 12). Establishing acceptable and unacceptable levels of use is critical for quality of practice and implementation of an innovation. CBAM provides a structure for assessing the level of implementation and determining a range of acceptable and unacceptable categories that each individual or school can use for determining where they fit on the continuum of implementation of the initiative. This client-centered model can help users in the implementation process. It provides a physical model for the actual implementation of the innovation which enables the brain to create the learning or physical change necessary for successful implementation.

**Relationship of Organizational and Individual Change in CBAM**

The focus of facilitation should be on individuals, innovations, and the context. It must be remembered that the real meaning of any change lies in its human, not material, component (Hord et al., 2004, p. 6). People must be worked with in an adaptive and systemic way, designing interventions for individual needs and realizing that those needs exist in certain settings or situations. Because of this, the speed at which a successful change is implemented may be altered along the way (p. 7). In a system where there are several different geographical locations, such as several schools in a system, this could
mean that the speed of progress for different individuals could vary and, therefore, the speed of progress would vary in the schools within the system. Thus, every school or district would not necessarily be in the same place at the same time.

Because individual and organizational change is a process or a journey, it is easy for those who have made the change to forget the journey they traveled to arrive at a certain point. Black and Gregersen (2008) report that it is though once the light goes on, it turns off our memory of how we got there and how much time and effort it took to get there (Black & Gregersen, 2008, p. 50). There is a tendency to feel that if you tell someone once about a new strategic vision or implementation, he or she will get it, too. In reality, it does not work that way. It is important to remember to allow others to journey and process, as you had to journey and process, as they work to understand and implement the new initiative you are proposing.

**Theoretical Framework for the 4MAT Model**

The 4MAT System is a model for educational technology based on research in learning styles, hemisphericity, art, creativity, and effective management training. It presents learning as a natural cycle that capitalizes on the strengths of four major learning styles. These have been identified by researchers from many fields: Carl Jung and Kurt Lewin in psychology, John Dewey in education, David Kolb in management and organizational psychology, David Merrill in sales and personnel training, and Bernice McCarthy in Learning Theory. This combination of findings is the basis for the 4MAT model, which is developmental and useful for all teaching levels and content areas. 4MAT follows a natural cycle of learning, appealing to all learning styles, in a sequenced
framework. It includes descriptions for the changing role of the teacher from Motivator to Instructor then Coach to Evaluator as learners move through the learning cycle.

In addition, throughout the 20th century, research on individual psychological differences has occurred. In the 1920s, Carl Jung was one of the pioneers in this area (Ellis, 2005). Jung conceptualized the idea that personality plays a role in how one behaves and respond to their surroundings. Extraverts/introverts, sensing/intuition, thinking/feeling, judging/perceiving were personality types that resulted from Jung’s research (Thomson & Gopalan, 2005).

One of the most influential thinkers in the 20th century was John Dewey. Dewey (early 1900s) believed that hands-on learning or experiential education was critical to the learning process and that all learning is a continuity of experience where each new experience takes up with some experience from the past and alters or transforms the quality of experiences that come after (Doll, 1993). Reflection, interaction, and transaction emphasized reflection, which bridged the gap between the philosophical and the practical. “It’s not the doing that matters,” said revered educator, John Dewey, “It’s the thinking about the doing” (Archambault, 1974, emphasis added).

In the 1970s David Kolb drew extensively on Dewey’s work regarding experiential learning (Smith, 2001). Kolb observed what he called a learning cycle discovered while studying what physically happens in the brain when learning is taking place. By combining ideas of learning and development, Kolb said real learning for comprehension happens through a sequence of experience, reflection, abstraction, and active testing (Kolb, 1984).
David Merrill says there are two basic dimensions of behavior observed in everyone: assertiveness and responsiveness. The way one combines these two dimensions becomes that person’s social style. A social style is like a picture or map of what others observe you saying and doing. There are four basic social styles in sales and management. These are the driving style, the expressive style, the amiable style, and the analytical style (Merrill & Reid, 1999). Merrill says there is no “best” style. These are simple descriptions of how people behave and function.

Bernice McCarty’s 4MAT System incorporates brain research and learning styles (Ellis, 2005). In her work, McCarthy synthesized Kolb’s cycle of learning, John Dewey’s emphasis on the human experience in learning, and Carl Jung’s personality types. She studied major works from the medical field regarding the function of the left and right hemispheres of the brain and designed a practical framework for educators to use for instruction in the classroom. McCarthy took Kolb’s concept that learning comes through a sequence of experience, reflection, abstraction, and active testing to develop the 4MAT model for instruction, which honors Kolb’s natural cycle of learning, providing a framework for designing and delivering instruction.

McCarthy (2000) describes four basic mind styles. The first one is the imaginative learner, who learns best through feeling and watching, seeking personal associations, meaning, and involvement. The second learner is analytical, who prefers listening to and thinking about information; seeking facts, thinking through ideas; and learning what the experts think. The third learner has common sense learning, for whom thinking and doing through experimenting, building, and creating are critical. Finally, the fourth learner needs dynamic learning experiences involving doing and feeling. He or she seeks hidden
possibilities, explores, and learns by trial and error. Self-discovery intertwines in their learning.

While educators have believed it is best to teach each child through his or her learning preference (Dunn & Dunn, 1992), McCarthy (2000) proposed that students who were exposed to all types of styles did the best. Students would really shine when their learning preference was the method of instruction, and they would stretch when the lesson was outside of their preference. This helped them to grow and develop in ways they would not have grown if the lesson had catered only to their particular style.

The 4MAT framework (see Figure 2) is a wheel divided into four quadrants. Quadrant 1 addresses *Why* the lesson is important to the learners. It provides the learners with an experience that connects them to the concept of the lesson. Quadrant 2 leads the learners to the *What* providing information on the subject by bridging experience and the desire to know what the experts say. Here the learners begin to connect their experience to the actual lesson the teacher is wanting them to learn. Quadrant 3 helps the learners begin to discover *How* they might use the new information in real life, extending the knowledge beyond what they have just learned. As the learners explore new possibilities and tinker with the new information, they naturally move to Quadrant 4 where they can ask the question *What If*. At this point in the learning, the students apply their newly learned information, integrating the lesson learned into their actual lives. This changes them in some way as new knowledge now becomes a part of who they are (McCarthy, 2000).

When the 4MAT framework is used to design instruction, learners are exposed to each of the four major learning methods in sequence: Connection to Personal Experience,
Development of Conceptual Understanding, Guided Practice and Application, and Creation Leading to Learner Synthesis and Integration (McCarthy, 2000). In addition to outlining teaching methods for different learners, the model also uses brain-based processing strategies leading to whole-brain instruction: analysis and creativity, sequential and gestalt perceptions, rational and intuitive logic, traditional lecture method and participative group work (Joyce et al., 2011; Kagan & Kagan, 2008; Zull, 2002).

**Individual Change and 4MAT**

The 4MAT model combines the work of John Dewey, David Kolb, and Carl Jung and draws heavily upon current brain studies. The model assumes: (a) that individuals learn in different yet identifiable ways, and (b) engagement with a variety of diverse learning sets results in higher levels of motivation and performance. The system applies these long-standing theories to provide a structure for teachers to use in planning.
meaningful learning experiences for the different types of learners. This structure is an eight-step model for teaching. Below is a summary.

Step One: Takes the learner through a concrete experience that draws upon the learners’ prior knowledge and experience. This step encourages relational, symbolic thinking, which is a right-hemispheric function.

Step Two: The teacher facilitates student reflection and dialog about the experience generated in Step One. The goal is engagement and emphasizes left-hemispheric thinking.

Step Three: This right hemispheric activity creates a context for the learner to shift from experiential to reflective thinking. The objective is to integrate personal experiences into conceptual understanding.

Step Four: New information is presented building upon the personal connections established in Steps One and Two to foster conceptual thinking. This is a left-mode teaching activity.

Step Five: In this step the emphasis shifts from receiving information to assimilating the information. Here students will apply the information they have been taught. This left-mode activity will allow students to demonstrate correct answers and their ability to apply the concepts.

Step Six: Here the students are encouraged to develop their own applications of the information learned. Project work is the essence in this step. This right-mode activity helps students to create personal applications of their experiences from the information learned.
Step Seven: This step requires the student to critically examine his/her newly acquired knowledge in light of their existing worldview. Students face and resolve contraindications between old ideas and new. The goal is to guide students to refine their old ideas and form a new and more complete perspective. This is a left-hemispheric activity.

Step Eight: The final step is right mode in nature and for the purpose of integration, celebration, and closure. This happens in the form of presentations, letters mailed, poems recited, reports submitted, etc. The teacher’s role is to join in the celebration and prepare students for entry into the next unit of study.

The 4MAT system, based on whole-brain learning, is designed to make neuronal change. Zull (2002) in his book, *The Art of Changing the Brain*, states:

> The knowledge in our minds consists of neuronal networks in our brains, so if that knowledge is to grow, the neuronal networks must physically change. This is the change that a teacher wants to create. It is change in connections. We may want stronger connections, more connections, different connections, or even fewer connections, but unless there is some change in connections, no learning can occur. (p. 112)

Zull, a Professor of Biology and of Biochemistry and Director of The University Center for Innovation in Teaching and Education (UCITE) at Case Western Reserve University, says that teachers can encourage change in the synapses of their students. After 25 years of research on cell-to-cell communication, protein folding, cell membranes, and biosensors, Zull turned his interest toward understanding how brain research can inform teaching. Building on his background in cell-to-cell communication, his experience with human learning and teaching at UCITE, and drawing on the increasing knowledge about the human brain, he wrote his first acclaimed book, *The Art
of Changing the Brain: Enriching the Practice of Teaching by Exploring the Biology of Learning.

Zull’s research re-affirmed Kolb’s natural cycle of learning. In biology, the way things work depends on their physical structure. For learning, Zull says to look at the structure of the brain and how information is physically processed to generate comprehension and understanding. What he discovered is that Kolb’s theory for the cycle of learning literally arises naturally from the physical structure of the brain (Zull, 2002).

The 4MAT Model finds further support through the research Zull conducted on the back cortex and the front cortex of the brain. Generally, receiving and remembering is located in the back part of the brain, or the back cortex. Ideas and actions initiate in the front part of the brain or the front cortex. The front and the back parts of the brain connect so they can communicate with each other. The learner transforms from a receiver of knowledge to a producer of knowledge when making effective connections between the front and back cortices. In 4MAT, Quadrants 1 and 2 honor the back cortex, where one receives and remembers information. Quadrants 3 and 4 honor the front cortex, which transforms the learner into a producer of knowledge. Zull says the structure for learning is a well-proportioned foundation. There should be balance between receiving knowledge and using knowledge. When this is achieved, our foundation can be an integrated part of the larger structure (Zull, 2002). Zull’s research provides solid support for the use of the 4MAT model as a framework for instruction.

White (1905) writes that the learner should advance as fast and as far as they can in acquiring knowledge. Using their knowledge as they learn will empower and discipline their minds, determining the value of their education. Spending a long time in study, with
no effort to share the learning, proves a hindrance rather than a help to real development. The 4MAT framework provides the structure for learners to broaden their learning, and apply it to their daily lives, transforming them from receivers of knowledge to producers of knowledge.

**Organizational Change and 4MAT**

McCarthy has developed communication methods, leadership methods, and change methods based on the 4MAT framework. McCarthy (1982) also overlays the two models of CBAM and 4MAT for looking at individual differences to produce powerful staff development. This provides a framework for doing what Zull (2002) might have meant when he commented, “It is one thing to point out facts about the brain and another to translate them into facts about learning” (p. 3). Benjamin Franklin (1731–1813) said long ago, “Tell me and I forget. Teach me, and I may remember. Involve me, and I learn” (Halmos, 1985, p. 258). Both the CBAM and 4MAT models involve individuals in the process so they will learn.

The 4MAT principle applies to organizational change as well as individual change. In organizational change, 4MAT is looking both at the individual and at the organization. The organization must also go through the Natural Cycle of Learning for individual buy-in so critical to successful implementation and change. The natural cycle means that we first experience something, next we reflect on it, after that we conceptualize the idea, then we act by trying it out, and finally we integrate it into our life (McCarthy, 2000). In organizations, this cycle happens as a group, even though not everyone goes through all the steps at the same speed or in the exact same way. By sharing and processing together, the experiences become broadened and much richer.
Relationship of Organizational and Individual Change in 4MAT

Bernice McCarthy has overlaid the CBAM stages in four categories of the natural cycle (see Figure 3):

1. Understanding
2. Internalizing
3. Operationalizing
4. Evaluating (McCarthy, 1982).

McCarthy (1996) says that in her experience in staff development and business settings, the move from personal to management is a big step. There is a kind of reflection before people can move from personal concerns to the processes and task of implementation. In other words, they need more time to deepen and affirm personal meaning before moving to the commitment of managing innovation. In the 4MAT model, Quadrants 1 and 4 develop leadership skills, whereas Quadrants 2 and 3 increase management abilities.

Theoretical Framework for the Study Group Model

An initiative launches, the core components are identified which include behavior variations from ideal to unacceptable, and specific training is provided to the teachers for implementation. So, is this enough to bring about the desired change in the classroom? Studies indicate that these things are still not enough to effect change in the workplace, which is the initial purpose of the innovation in the first place. Research on training and the change process (Fullan, 1999; Hall & Loucks, 1981; Joyce & Showers, 2002) has established that transfer does not happen without a social system in place to keep a practice going. Joyce and Showers (2002) have shown that only 5-15% of teachers who
Figure 3. McCarthy’s overlay of CBAM and the 4MAT model. From “Improving Staff Development Through CBAM and 4MAT,” by B. McCarthy, 1982, Educational Leadership, Volume 40, Issue 1, p. 24. Reprinted with permission.
received training in teaching strategies that were substantially different from their usual method of teaching, without on-going support, were able to transfer the practice to the classroom over time. However, when ongoing coaching was added to the theory, demonstration, practice and feedback, 80%–90% of teachers could transfer the new skill (Dale, 1969).

It is critical to create an ongoing environment of support for educators who are learning new skills (Joyce et al., 2011). Murphy (1995) developed a Whole-Faculty Study Group approach where all teachers are members of small groups, no larger than six, who meet on a regular basis to focus on teaching and learning. Murphy’s design has five principles to guide the process: (a) Students are first, (b) Everyone participates, (c) Leadership is shared, (d) Responsibility is equal, and (e) The work is public. Murphy’s model (1995) provides a way for an entire school or system to implement an innovation at the same time, at the same level, for the same purpose.

Henriquez-Roark (1995) researched study groups in a public school district in Georgia and then applied what she found to the Seventh-day Adventist setting. She defines the study group as a team of four to six teachers who meet together and follow four specific steps: a discussion of theory or rationale with the content of the innovation, demonstrations of the innovation, practice and feedback, and coaching. As the teachers participate, practice, give feedback, and coach each other, they begin to develop meaning, skills, and the ability to transfer the new practice into their normal teaching repertoire. While providing the practice necessary for the transfer of skills and strategies, study groups also exert the pressure and motivation required to continue to practice. Research studies have found that cooperative settings, when compared to competitive settings,
promote more mutual liking, more sharing, and more positive relationships (Henriquez-Roark, 1995; Johnson & Johnson, 2006).

**Individual Change and the Study Group Model**

In her study, Henriquez-Roark (1995) found that teacher study groups promoted specific change in individuals. An average of 85% of the teachers participating in Henriquez-Roark’s study reported growing professionally because of participating in study groups. They used study groups to plan, share new ideas, and solve problems. The teachers expanded their teaching repertoire. There was more emphasis on curriculum and instruction because they were not afraid to borrow from their peers or share ideas. They were accountable to each other and felt they were becoming better teachers.

Additional professional benefits included an individual increase in reading, more sharing of ideas, and trying each other’s ideas, with an openness to share challenges and problems. Teacher study groups provided a forum where they processed their thinking for support and guidance, which facilitated more communication between peers and fostered a better ability to see things from the other person’s point of view. Some teachers even experienced a change in their conceptual beliefs and discovered personal leadership qualities (Henriquez-Roark, 1995).

Murphy’s model is a student-driven approach to staff development. These Whole-Faculty Study Groups facilitate a deeper understanding of academic content; help to implement district-wide initiatives in curriculum, instruction, and technology; integrate and give coherence to a school's instructional program and practices; target school-wide instructional needs; study research on teaching and learning; monitor the impact or
effects of instructional initiatives on students; examine student work with colleagues; and reflect on current teaching practices (Murphy, 1995).

**Organizational Change and the Study Group Model**

When teacher study groups lead to the professional and personal development of individual teachers through a collaborative process, these educators influence organizational growth and success. Margaret Wheatley (2002, p. 9) states “that when we begin listening to each other, and when we talk about things that matter to us, the world begins to change. . . . All change, even very large and powerful change, begins when a few people start talking with one another about something they care about.” Robert Quinn (1996) in referring to organizational change states that there must be provision for enough encouragement, help, and support so the people have courage to try the change. Support groups such as Alcoholics Anonymous, AAA, peer support groups, and Meetup Groups are becoming available in many places, creating subcultures, which help thousands of people to change and grow.

Teacher study groups develop a subculture where teachers share and act upon common values and beliefs. Thirteen components define these groups:

1. A group of four to six
2. Long-term focus and common purpose
3. Focus on implementing an innovation
4. Innovation focused on increased student achievement
5. Regularly scheduled during the school day
6. A written agenda
7. Leadership responsibilities pre-determined and can be rotated
8. Assignments given and participants report back on progress

9. Administrative personnel participate

10. Includes modeling, demonstration, practice, feedback and coaching—emphasis is on student results

11. Risk-free collaborative environment

12. Establishes a connection between initial training and follow-up activities

13. Meet regularly following this pattern: once per week for 1 hour/bi-weekly for 2 hours/once a month for four hours (Henriquez-Roark, 1995).

Murphy’s (1995) Whole-Faculty Study Groups focuses on the following 15 guidelines:

1. Group size between three and six

2. Membership determined by addressing an identified student need

3. Regular weekly or every two weeks meetings

4. Established group norms

5. Rotating leadership to all members

6. Develop a Study Group Action Plan

7. Complete a Study Group Log for each meeting

8. Requires members to routinely examine/observe student work in classrooms

9. Make a comprehensive list of learning resources

10. Multiple professional development strategies

11. Reflection on the study group's work and impact on student performance

12. Recognize all study group members as equals

13. Expect transitions
14. Assess study group work to determine what evidence there is that student needs have improved

15. Establish a variety of communication networks and strategies (Murphy, 1995).

When teacher study groups, Whole-Faculty Study Groups, or similar groups form a subculture, this can give rise to what Gladwell (2000) refers to as the *tipping point*, or the permeating of the organization, creating organizational change. Therefore, with CBAM as a collaborative-based research method to define the innovation and 4MAT as the framework for delivering brain-friendly differentiated instruction, the study group model is the third essential component for reaching the *tipping point* (Gladwell, 2000) and the desired change.

**Relationship of Organizational and Individual Change in the Study Group Model**

We know that organizational change directly relates to individual change. Quinn (1996) found a surprising link between change in the individual level and change at the organizational level. Transformation of a system cannot take place without leaders taking risks viewed as unacceptable. This appears to be a top-down process. However, Quinn goes on to state the opposite is also true: change can come from the bottom up. Neitham (2005) says that “everyone is a leader of everyone; everyone a follower of everyone.” If it is true that change can come from either top-down or bottom up, and if it is true that everyone at times is either a leader or a follower, then it follows that using the study group model could ensure change for both the individual and the organization whether it was initiated by established administration or by various individuals. However, administrative support of the program is critical for the survival and success of the study group/Whole-Faculty Study Groups. There should be specific times regularly scheduled
during the school day for meetings. It is job-embedded, and every faculty or teacher should be a member of a group (Henriquez-Roark, 1995; Murphy, 1995).

Whenever an organization tries to implement a change, individuals are required to also change (Quinn, 1996). When the new initiative requires new understanding and skills of its employees, Henriquez-Roark (1995) points out the critical role of the study group model for supporting and ensuring that change happens. Organizational change and individual change are dependent on each other for successful transitions.

**Comparisons of CBAM, 4MAT, the Study Group Model, and Whole-Faculty Study Groups**

When a system adopts an initiative, everyone can have different ideas of what that initiative actually looks like. Even at the implementation level, things can be very different. CBAM is a collaborative method for defining and determining the acceptable and unacceptable variations of use for the initiative. It provides for the individual differences and concerns considered along a continuum of implementation. CBAM is the system overlay of the 4MAT framework for defining, implementing, and measuring organizational change (McCarthy, 1982).

The 4MAT framework supports the experiential curriculum theory. 4MAT begins with the learner experiencing something that connects them to something they already know. Then, moving through the natural cycle of learning creates new information for the learner. The lesson culminates with a personal application of the new information to a real-life experience. 4MAT is a whole-brain learning structure that provides an effective framework for engaging the left and right modes of the brain and providing for the various mind styles (McCarthy, 2000).
Study groups provide the structure necessary for implementing effective change in the classroom. Only 5-15% of teachers will successfully implement new training or teaching strategies into their classroom instruction without ongoing support. Teacher study groups provide the support needed through discussion, demonstration, practice, feedback, and coaching (Henriquez-Roark & Green, 1996). Whole-Faculty Study Groups provide support for an entire school or system to implement an innovation at the same time, at the same level, and for the same reason (Murphy, 1995). See Table 1.

**The Adventist EDGE Initiative and Change**

The development and implementation of the Adventist EDGE initiative has been a journey that educators in the Southern Union have been traveling on together since the late 1990s. However, we are not all in the same place on the journey. There are several reasons for this. Different individuals have joined this journey at different times. The overall meaning of the initiative takes on diverse perspectives at the administration level, the conference implementation level, the school implementation level, and the student level. While each level has similar job descriptions, the environment and situations vary greatly, conveying as many perceptions about the initiative as there are individuals. Trying to measure an initiative with this kind of variance is impossible. An operational definition must reach an agreement among those defining the initiative in order to move forward in a successful manner.

Using the Innovation Configuration method in this study addresses these differences, bringing us together in our understanding as a group. It is effective because every level of implementation has a part to play in forming the results instead of a mandate given from the top down. The Innovation Configuration Tool matches what the
Table 1

*Synthesizing of CBAM, 4MAT, Study Groups, Whole-Faculty Study Groups*

<table>
<thead>
<tr>
<th>Categories</th>
<th>Elements with Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CBAM</strong></td>
<td></td>
</tr>
<tr>
<td>Theory</td>
<td>Individual Centered. Creates a collaborative agreement within an organization.</td>
</tr>
<tr>
<td>Individual Change</td>
<td>Allows for individual personal concerns, perceptions, and progression.</td>
</tr>
<tr>
<td>Organizational Change</td>
<td>Provides a definition for clarity within the system with a continuum for adoption for individual entities.</td>
</tr>
<tr>
<td><strong>4MAT</strong></td>
<td></td>
</tr>
<tr>
<td>Theory</td>
<td>Student centered by following the natural cycle of learning. Creates learning environment for all types of learners.</td>
</tr>
<tr>
<td>Individual Change</td>
<td>Every individual student will shine and be stretched in all lessons.</td>
</tr>
<tr>
<td>Organizational Change</td>
<td>Creates critical thinking individuals who have something special to offer society that no one else can deliver.</td>
</tr>
<tr>
<td><strong>Study Groups</strong></td>
<td></td>
</tr>
<tr>
<td>Theory</td>
<td>Teacher Centered.</td>
</tr>
<tr>
<td>Individual Change</td>
<td>Individual teachers adopt new &amp; better strategies for teaching at a pace that is successful for them personally.</td>
</tr>
<tr>
<td>Organizational Change</td>
<td>Teachers become collaborative, supportive teams in a learning/teaching setting.</td>
</tr>
<tr>
<td><strong>Whole-Faculty Study Groups</strong></td>
<td></td>
</tr>
<tr>
<td>Theory</td>
<td>Student centered. Teachers rethink their teaching strategies for individually challenging students, and individual students experience a new learning experience.</td>
</tr>
<tr>
<td>Individual Change</td>
<td>Teachers become collaborative, supportive teams in a learning/teaching setting.</td>
</tr>
<tr>
<td>Organizational Change</td>
<td>Creates critical thinking teachers, which change learning/teaching.</td>
</tr>
</tbody>
</table>
research says about the brain and change, honoring the research principle we say is a part of the Adventist EDGE. The Innovation Configuration is a collaborative tool for uniting different perceptions for this type of initiative. It specifically addresses the issue of so many variances in a program. Therefore, because the Adventist EDGE initiative involves a broad range of change with many variances in the program, the Innovation Configuration is an effective method for conducting this study, which will establish the EDGE core components with descriptions of specific behaviors placed in categories ranging from ideal to unacceptable.

**Summary**

In summary, the Adventist EDGE initiative is a response to the realization that times have changed and so effective education will have to change. Change is difficult because there is a tendency to deny that we need change. The old mind maps are so strong that one may think they have changed when all they are really doing is talking about it, using the new terminology, while still doing the old things. Change is a process, not an event, and individuals accomplish the change. It is a highly personal experience. It involves developmental growth where individuals ask what it means and what effect it will have on them personally. The focus of facilitation is on individuals, innovations, and the content.

The Innovation Configuration, a component of CBAM, takes all of the above into consideration, making it an effective tool for determining the components of the Adventist EDGE initiative. CBAM overlays the 4MAT framework and complements how the brain learns, a major principle of EDGE. The Study Group model provides the
support critical for making effective change at the classroom level. These models give structure and support for the successful implementation of the Adventist EDGE initiative.
CHAPTER III

METHODOLOGY

Introduction

My study took place in the Southern Union Conference of Seventh-day Adventists. I selected this area in the United States because it was the only Union Conference implementing Adventist EDGE. In this study, I explored the elements and components of the Adventist EDGE for teachers and schools. By using the Innovation Configuration study, one of the tools of CBAM, I developed a separate operational definition or the Innovation Configuration for the EDGE Teacher and the EDGE School. I used the following questions to guide my research:

1. What elements must be present for a classroom/school to be an Adventist EDGE classroom/school?

2. What are the core components of the Adventist EDGE teacher/school?

3. Within each component, what is the continuum of behaviors from ideal to unacceptable?

I decided to use an Innovation Configuration study because of my interest in insight, discovery, and interpretation, rather than hypotheses testing. An Innovation Configuration study is a written description of the components of an innovation, it describes what individuals will be doing as they implement each component, and includes variations of behavior ranging from ideal to unacceptable (Hord, Stiegelbauer, et
Using the Innovation Configuration study helped me to focus on people, their affects, and behavioral outcomes. My interest centered on discovery and confirmation of the data compiled for purposes of developing a better understanding of the dynamics of the Adventist EDGE initiative. The Innovation Configuration study was a particularly suitable methodology for dealing with the Adventist EDGE initiative because an IC can be developed when the implementation is already under way (Hord, Steigelbauer, et al., 2006). Implementation of the Adventist EDGE initiative had already begun (see chapter 1) and some critical issues of clarification were surfacing.

Another reason for selecting this methodology is strengthened by the fact that Bernice McCarthy, founder of About Learning and designer of the 4MAT model, endorses CBAM (Hord et al., 2004). The Innovation Configuration is one of the tools used in CBAM. McCarthy (1982) makes a direct correlation between CBAM and the 4MAT framework by showing how they both overlay (McCarthy, 1982) to match the natural cycle of learning in the brain. In 4MAT, there are four basic quadrants. In CBAM, there are seven levels of development when implementing something new in the classroom. The first 4MAT quadrant has to do with learner Understanding and Personal connection, and the equivalent CBAM levels are the Awareness and Informational levels. The second 4MAT quadrant involves Internalizing, and the CBAM levels that correspond are Personal Meaning and Analysis for Professional Use. The third 4MAT quadrant deals with Operationalizing—trying out the information, and the CBAM counterparts are A First Try “cookbook” Approach and Unique Adaptation. In the fourth 4MAT quadrant, the learner evaluates and uses the new information for improvement in the real world, which aligns with the CBAM levels of Consequence and Collaboration (Hord et al.,
The use of CBAM’s Innovation Configuration was appropriate with this research because of the major role 4MAT plays in the EDGE initiative and the close correlation it has to the philosophy of learning and change. See Figure 3.

Innovation Configuration studies are qualitative in nature and focus on discovery, insight, and understanding from the perspectives of those being studied (Heck et al., 2006). Qualitative studies of this nature offer great promise of making significant contributions to the knowledge base and practice of education (Merriam, 1998). In this study, I observed other people’s construction of how they understood the Adventist EDGE through observations and interviews. I tried to establish relevancy through coherency, consensus, and by providing instrumental utility (a practical use) to aid the effectiveness of implementation (Eisner, 1998).

By coherency, I am referring to the feeling that the results “ring true,” it coheres by sticking or holding together a mass that is not easily separated and makes sense (Eisner, 1998). I have endeavored to provide enough detail to show that my conclusions make sense and represent a “good fit” at the time of this study. One must remember, however, that the EDGE initiative is an ongoing project which will continue to evolve and change as it progresses into the future (Hord et al., 2004). I have made a serious and sincere effort to provide enough detail of the story, processes, numbers, and experiences, so the reader is able to make appropriate generalizations (Merriam, 1998).

While consensus does not imply “truth,” it is a “result of evidence deemed relevant to the description, interpretation, and evaluation of some state of affairs” (Eisner, 1998, p. 57). Although the level of consensus may vary depending on the circumstances (Eisner, 1998), in this study the level of consensus included all those participating in the study.
because of the importance of unity for effective implementation of the Adventist EDGE initiative. Thus, the process took time and effort to collaborate back and forth between those participating in the study. This back-and-forth collaboration took 22 months until all the Developers and the Users were satisfied with the results.

While this study does reflect the opinions of the participants, their consensus creates a certain validity of their judgments (Eisner, 1998).

Finally, this study provides two instruments for use in identifying the varying levels of implementation in the classrooms and schools. These instruments are the Adventist EDGE Teacher Innovation Configuration Checklist (Appendix E) and the Adventist EDGE School Innovation Configuration Checklist (Appendix F). These configuration maps can serve as a guide to deepen and broaden the Southern Union’s understanding about the Adventist EDGE initiative (Eisner, 1998). These configuration maps can provide a vivid portrait of what the Adventist EDGE is like in its ideal settings and its unacceptable settings with varying ranges on the continuum from poor to ideal. They can be helpful in introducing the program, determining how to implement the initiative in the classroom or school, and to monitor program progress (Hord et al., 2004).

In summary, a qualitative case study, in this situation specifically the Innovation Configuration study, is an intensive, holistic description and analysis of a phenomenon of a program, an institution, a person, a process, or a social unit (Merriam, 1998). I chose to use the Innovation Configuration, one tool of the CBAM model, as the method to develop the operational definitions or the Innovation Configuration maps for the EDGE Teacher and the EDGE School. What follows is a description of how I selected my informants, an outline of how I conducted my research, and a discussion of quality issues in qualitative
research. The purpose is to provide you with evidence that careful implementation of procedures were followed, producing outcomes that fit and made sense for the Adventist EDGE initiative.

**Selecting Informants**

In qualitative studies such as this study, a sample is seldom random (Eisner, 1998). I did not use the study to answer questions like “how much” and “how often,” which usually require random sampling (Merriam, 1998). Rather, I used the study to describe what occurs in the Adventist EDGE initiative. The base for purposeful sampling assumes “that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (Merriam, 1998, p. 61). In order to select samples from which the most could be learned, I used purposeful sampling for this study.

The first sample formed the group I call Developers. The criteria I used for their selection was that they must be a Seventh-day Adventist, they must be in an administrative or consulting position, and they must be an active participant in the Adventist EDGE initiative development (Forbes, 2007-2010c, sec. 1, p. 1). The list was formed through a collaborative process in which key players, Developers and Expert Users (see below), were asked to identify those who they believed were important to include in the list of Developers (Forbes, 2007-2010c, sec. 1, pp. 2-7). I felt it was extremely important to make sure all key stakeholders had a voice in the outcome. I believed it would be critical for union-wide buy-in of the initiative. The resulting list of 27 invited Developers received final approval from the Southern Union Director of
Education (Forbes, 2007-2010a, sec. 1, pp. 3-5). Of the 27, 20 agreed to participate in the study (Forbes, 2007-2010c, sec. 1, pp. 10-12).

The next purposeful sample I refer to as the Expert Users. Their names came from the eight superintendents throughout the Southern Union. The Expert Users were identified as teachers in each respective conference who had received 4MAT Trainer of Trainers and whom the superintendents considered to be presently implementing the Adventist EDGE program in his/her classroom (Forbes, 2007-2010a, sec. 14, pp. 55-70). Of the 20 teacher names submitted, seven agreed to participate in the study (Forbes, 2007-2010a, sec. 1, pp. 67-70).

The last purposeful sample I called the Various Level Users. Again, I received these names from the eight superintendents in the Southern Union. The criterion for their selection was that they were a teacher in the respective conference in the Southern Union. I asked for a variety of teachers from those not using the Adventist EDGE initiative, to those who were, and the varying levels of implementation in between (Forbes, 2007-2010b, sec. 4, p. 30). I received 62 names and of those 62, 12 consented to participate in the study. I was extremely pleased that out of those 12 teachers, every single grade from kindergarten through the 12th grade was represented (Forbes, 2007-2010b, sec. 4, p. 30). This provided valuable feedback for all grade levels. It should be noted that in the Southern Union, some of the teachers teach at least two grades and many more teach three or four grades, and some as many as six grades (Forbes, 2007-2010b, sec. 4, p. 33).

Establishing the Operational Definitions (Innovation Configurations)

The Innovation Configurations (ICs) were constructed from collected data that identified the core components of the EDGE (Forbes, 2007-2010b, sec. 1, pp. 3-19).
configurations are the operational patterns of the innovation that result from use of different component variations (Heck, Stiegelbauer, Hall, & Loucks, 1981, p. 15).

Initially, I thought that only one IC would result from my data. However, as it turned out, I discovered two distinct areas that needed describing: (a) one IC for the EDGE Teacher and (b) one IC for the EDGE School. Below is an overview of the steps I followed.

**Step 1: Identify the Initial Components**

In Step 1, I identified the initial components by asking the Developers of Adventist EDGE 12 general questions (Forbes, 2007-2010a, sec. 14, pp. 1-45) in three major areas regarding their perceptions of what constitutes the Adventist EDGE. Those three major areas asked the respondent to describe what Adventist EDGE is to them; things one should see when visiting an EDGE classroom; and the roles of church including local, conference, and union (Forbes, 2007-2010a, sec. 14, pp. 1-45). Developers, selected by the Southern Union Education office, were administrators who had been active members of the Curriculum, Instruction, and Assessment Committee (CIAC) from its inception or had been key players in the emerging development of the initiative (Forbes, 2007-2010c, sec. 1, pp. 1-12). I interviewed these Developers to help establish the basic components of EDGE. The interview questions for the first survey were very broad and open. I looked for general ideas that might surface without prompting. The questions were:

1. What would the Adventist EDGE look like in the classroom?
2. What do teachers do?
3. What do students do?
4. What do teachers and students do?
5. What do parents do?
6. What do school boards do?
7. What does the local church do?
8. What does the conference do?
9. What does the Union do?
10. Describe a typical sequence of activities over a period of time or pick a classroom and describes what goes on in it.
11. List each component and tell me about it.
12. What are other parts of Adventist EDGE that you did not mention as the most essential components?

To get clarification from the results of the first survey, I formed a second set of survey questions as follows:

1. How might a student know if the teacher has a commitment to Jesus?
2. How might the students know the teacher loves them?
3. What would best practices include?
4. What would be considered consistent in implementing the best practices?
5. What might be involved in creating an environment for students where teachers facilitate a journey to excellence and knowledge?
6. What does mastery learning mean?
7. What kinds of teaching strategies should be included?
8. What would constitute a clear understanding of the learning process?
9. Does the Adventist EDGE address the needs of all learners? Why or why not?
10. What might constitute the “proper” utilization of 4MAT?
11. How does cooperative learning work in the classroom?
12. Why might integrated curriculum, an enriched environment that reflects the complexities of life and provides a holistic context for learning (Olsen & Kovalik, 2010), be a critical component of the EDGE classroom?

13. What is the difference between a teacher that is “called” to the teaching profession and one that has chosen teaching for a job?

14. How might the parents feel and understand that a teacher values them significantly in the role of parents as part of a critical team working for the success of their child?

15. What might be meant when someone talks about building a learning community?

16. How does the Adventist EDGE improve the reality of Adventist Education?

17. How does the Adventist EDGE improve the perception of Adventist Education?

18. What is staff development?

19. What are teacher study groups?

20. Are study groups and staff development the same things? Please explain why or why not.

Both surveys were sent to the Developers and the Expert Users who were identified by their local superintendent as EDGE teachers who had received training in the 4MAT framework and were using it in their classrooms.

Step 2: Organize and Categorize Data

Taking the results from these two sets of questions, I sorted the information into three groups using the TABA method (Green, Burton, Henriquez-Green, & Green, 2001). These groups were EDGE teacher, EDGE school, and EDGE conference/union.
leadership. Then, using the categories outlined in Learning Places (Fullan & St. Germain, 2006), I organized the teacher and school data from my groups to fit under Fullan and St. Germain’s three categories and further divided each of the three categories into 12 subcategories. This provided a framework to organize the data into something meaningful for further discussion (Forbes, 2007-2010a, sec. 2, pp. 3-15).

Step 3: Identify Additional Components and Variations

I began the third step by sharing the data, organized into the 12 areas, with the Developers. I explained how I had used the TABA method to group the data into three EDGE categories and then organize the information into the 12 areas. We decided to conduct the study for the teacher components and the school components, leaving the conference/union components for a later time. We worked on the teacher components first. The Developers discussed data they thought were missing from the initial list. Some of the conversation on what to consider in the EDGE teacher components included statements listed below:

“Christ is reflected throughout the curriculum with spiritual applications demonstrated in a ‘matter of fact’ manner by the teacher” (Forbes, 2007-2010a, sec. 14, p. 30).

Teachers must be trained in a variety of learning strategies; teachers must be involved in ongoing staff development; classrooms must be visually inviting; each learner and learning style must be honored; connections for the learners must be established before new concepts and/or information is explored; dialog and collaboration encouraged; self-discovery materials, tools, and technology must be available; learning must be celebrated. (Forbes, 2007-2010a, sec. 14, p. 34)

“Latest initiative such as 4MAT and Cooperative Learning methods. Tried and true traditional methods of instruction and assessment linkage” (Forbes, 2007-2010a, sec. 14, p. 32).
“To maximize learning to teach for mastery” (Forbes, 2007-2010a, sec. 14, p. 37).

“Integration (of subjects) makes connections for students and allows mastery of concepts to occur” (Forbes, 2007-2010a, sec. 14, p. 42).

“Joint goal setting, clear and frequent communication involvement in homework and other learning experiences” (Forbes, 2007-2010a, sec. 14, p. 44).

This discussion included deliberation regarding additional components and variations and why or why not to include them. The components were then shared with the Expert Users for their input. The feedback from the Expert Users included less debate than with the Developers. Perhaps that was because the Developers had clarified much through their different discussions. On the other hand, it could be that it was easier for the Expert Users to identify what was already in place, including what was and was not working in the field. Perhaps it was because there were only seven Expert Users. In any case, it took 16 months of interviews and/or discussions to reach a consensus by both the 20 Developers and the seven Expert Users.

Step 4: Develop an Innovation Configuration Map

Next, I interviewed 12 educators who were at various stages of EDGE implementation, ranging from non-use to full implementation. The local superintendents provided this list of educators from the Southern Union Conference. The users selected for this step represented a wide range of EDGE users so there were many variations. While this Various Level Users group included successful users, it was not limited exclusively to the successful users, but designed to include a variety of users at different levels of implementation. I categorized and organized the data from the interviews into
sections labeled Ideal, Acceptable, and Unacceptable for the Teacher IC and Ideal, Progressing, Emerging, Unacceptable for the School IC. See Table 2 for examples. You will notice there are three levels for the teacher and four with the school components. The reason for these levels emerged from the details of conversations and feedback with the Developers. While the Teacher Innovation Configuration initially involved more conversation on the part of the Developers, the School Innovation Configuration received more testing and actual application in the field by the Developers. Because of the experience with the Teacher IC, and a better understanding of the IC process and how it would help the Adventist EDGE initiative, the Developers were much quicker with the School IC.

I used the agreed-upon components and variations to construct configuration maps for the Teacher IC and the School IC. The Developers discussed the elements of the

Table 2

_Innovation Configuration Map Samples for EDGE Teacher and School_

<table>
<thead>
<tr>
<th>Adventist EDGE Teacher – Innovation Configuration Map Sample</th>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faith is integrated into all subject areas.</td>
<td>Faith is integrated into some subject areas.</td>
<td>Faith is talked about only in connection with Bible class.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Adventist EDGE School – Innovation Configuration Sample</th>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher Study/Discipline Groups include all 13 configuration components found in the EDGE handbook.</td>
<td>Teacher Study/Discipline Groups include 10-12 items of the configuration components found in the EDGE handbook.</td>
<td>Teacher Study/Discipline Groups include 7-9 items of the configuration components found in the EDGE handbook.</td>
<td>Teacher Study/Discipline Groups include less than 7 items of the configuration components found in the EDGE handbook.</td>
<td></td>
</tr>
</tbody>
</table>
configuration maps asking questions such as: What should fit into the ideal? What did the unacceptable actually look like? And what language should be used to describe the variations between emerging and progressing in each category? (Forbes, 2007-2010a, sec. 1, pp. 7-23).

Steps 5 and 6: Pilot and Refine the Configuration Maps

We conducted a pilot test using the draft EDGE Teacher Innovation Configuration Map for clarity with educators who were at various stages of EDGE implementation ranging from non-use to full implementation. Twelve educators participated in this pilot test, representing every grade level from kindergarten through 12th grade. The feedback had to do with formatting, grammar, and spelling errors. The Developers had produced a document that was clear (Forbes, 2007-2010b, sec. 1, pp. 1-31).

The second pilot test was the EDGE School Innovation Configuration Map with two elementary schools, one large school with one teacher for every Grade K-8, and a small school with three teachers for Grades K-8. This pilot test was conducted by using the configuration map to help a school prepare for an Adventist EDGE validation visit (the process outlined by the Southern Union for recognizing Adventist EDGE School of Excellence [Southern Union Conference of Seventh-day Adventists, Office of Education, 2011]). The local school, the local conference office, and the Southern Union used the configuration map, providing me with additional clarification and corrections to the document. Most of the feedback came from the Southern Union through applying the configuration map to an actual process. That process, which took 4 months and six iterations, provided for the refinement and clarification of the EDGE School Innovation
Configuration map (Forbes, 2007-2010c, sec. 2, pp. 1-72). By the fall of 2009, the Southern Union Education Council voted the Innovation Configuration map as the official configuration map for Adventist EDGE Schools of Excellence (see Appendix F).

Step 1 was conducted only once and the data were used for both the Teacher and School IC. Steps 2-6 were conducted separately for both the Teacher IC and the School IC. Table 3 is an overall word pictorial of the above process. For the EDGE School Innovation Configuration map, Steps 5 and 6 were conducted simultaneously.

Table 3

Procedure for Identifying and Developing Adventist EDGE Teacher and School Innovation Configuration Maps

<table>
<thead>
<tr>
<th>Steps</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: Identify Components</td>
<td>Ask 20 EDGE initiative developers for program components. Interview seven EDGE trained teachers.</td>
</tr>
<tr>
<td>Step 2: Categorize Components</td>
<td>Share with Developers for clarification.</td>
</tr>
<tr>
<td>Step 3: Enlarge Pool of Components &amp; Variations</td>
<td>Re-define additional components and variations with EDGE developers via discussion until a consensus is agreed upon by the developers and expert users.</td>
</tr>
<tr>
<td>Step 4: Construct Innovation Configuration Map</td>
<td>Interview 15 various levels of users for a wide range of variations. Categorize and organized data into variations labeled Ideal, Acceptable, and Unacceptable for the Teacher IC and Ideal, Emerging, Progressing, Unacceptable for the School IC. Construct Innovation Configuration map by arranging the components and their variations. Discuss the configuration map with the developers for appropriateness.</td>
</tr>
<tr>
<td>Step 5: Pilot the Map</td>
<td>Pilot the configuration map for clarity and errors.</td>
</tr>
<tr>
<td>Step 6: Refine the Map</td>
<td>Make adjustments to the configuration map as needed. Make available to the Southern Union Education Office.</td>
</tr>
</tbody>
</table>
Quality Issues in Qualitative Research

Before I close this chapter, I want to address the issues of credibility in qualitative studies and in this study. Eisner (1998) states that in qualitative research “recognizing that neither pristine objectivity nor pure subjectivity is possible, recognizing that all experience derived from text is transactive, we can ask what it is about text that is likely to make it believable” (Eisner, 1998, p. 53). This question is important to answer when dealing with credibility.

Eisner (1998) believes three features are relevant: (a) coherence, (b) consensus, and (c) instrument utility. Coherence looks for the believability of the conclusion. Is the result a “good fit”? Is it logical? Does it make sense? Consensus means there is agreement regarding how much concurrence there must be before reaching a decision. This would depend on the significance of the decision. Finally, “the most important test of any qualitative study is its usefulness” (Eisner, 1998, p. 58). Merriam (1998) explains that a convincing qualitative study uses three techniques to ensure dependable results: (a) investigator’s position, (b) triangulation, and (c) audit trail. The investigator’s position presents an explanation about assumptions and theory behind the study, provides his or her position regarding the group studied, and the basis for selecting the informants. Triangulation uses multiple methods of collecting the data to strengthen the results (see Table 4). To authenticate the results of the study, it is important for the researcher to provide enough description and detail of the collection and compiling of the data process so others can follow the trail. This is called an audit trail. The following is a discussion of the validity, reliability and credibility, generalization, bias, sampling, and ethical considerations of this study.
Table 4

*Triangulation Matrix of the Relationship of Research Questions to Data Sources*

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Data Source 1</th>
<th>Data Source 2</th>
<th>Data Source 3</th>
<th>Data Source 4</th>
<th>Data Source 5</th>
<th>Data Source 6</th>
<th>Data Source 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>What elements must be present to be an Adventist EDGE classroom/school?</td>
<td>Survey Instrument</td>
<td>Interviews</td>
<td>Observations</td>
<td>Literature Review</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>What are the core components of the Adventist EDGE teacher/school?</td>
<td>Survey Instrument</td>
<td>Interviews</td>
<td>Observations</td>
<td>Literature Review</td>
<td>GoToMeeting Discussions</td>
<td>EDGE Handbook</td>
<td>None</td>
</tr>
<tr>
<td>What is the continuum of behaviors that are ideal to unacceptable in the variations of the teacher/school components?</td>
<td>None</td>
<td>Interviews</td>
<td>Observations</td>
<td>Literature Review</td>
<td>GoToMeeting Discussions</td>
<td>Pilot Feedback</td>
<td>Document Analysis</td>
</tr>
</tbody>
</table>
Validity

Eisner (1998), in commenting on the complex matter of descriptions of teaching and life in classrooms, makes three points. First, he says that it is impossible in principle to determine reality “as it really is” because of the mind-mediated version of what we think is true. Second, we cannot be certain of having ever found the “truth” because we are stuck with judgments and interpretations. Third, even when we have good grounds for judgments we make, our judgments will always be fallible and are never certain.

One way I established validity in this study was by using triangulation. Merriam (1998), Eisner (1998), and Patton (1982, 2001) are among many who recommend the use of triangulation in quantitative research to enhance the accuracy of the study. Table 4 represents a matrix of my research questions and the data sources I used to verify the findings from surveys, interviews, observations, institutional documents, and a review of literature. This triangulation involved multiple sources of data and multiple methods to confirm the data as they materialized. I also used member checks by taking the information back to the educators who provided the data to ensure the results were plausible. Through peer examination, I received feedback from colleagues to formulate the findings.

Reliability and Credibility

In this study, I have sought to describe and explain what is taking place, the Adventist EDGE initiative. While qualitative studies are based on the ability for the same results to be duplicated in another study, qualitative researchers establish that the results are consistent with the data gathered (Merriam, 1998). My use of triangulation provides me with multiple data sources to help support my conclusions. The feedback and
clarifications from those providing the information enhanced the reliability of the study. I have tried to leave an “audit trail” (Merriam, 1998, p. 207) by describing in enough detail how I conducted the study so others could follow my trail and authenticate my findings. I believe my conclusions are credible within the framework I chose to use (Eisner, 1998). By meeting these criteria, the readers can make their own generalizations about the study.

Generalization

Generalization is the degree to which the findings can be generalized from a study sample to the entire population or the transferring of what has been learned to another situation (Eisner, 1998; Merriam, 1998). To increase the possibility of generalizing the results from this study to other educational settings, I endeavored to provide enough descriptive information that could enable the reader to determine if this research could apply to their situation or setting. It is possible that skills, images, and ideas (Eisner, 1998) have emerged from this study that could benefit other Seventh-day Adventist Unions and Conferences. This study took place in one of the largest unions in North America; it includes feedback from teachers at every grade level K-12, and involved 20 administrators who were instrumental in the development of the Adventist EDGE initiative. The level of consensus between all 42 participants in the study was 100%, meaning that everyone agreed to accept the results as shared in this report with the understanding that this represents our perception of a “snapshot” of the Adventist EDGE at this “point in time” even though the Adventist EDGE will continue to grow and evolve. By sharing our story and the results of our collaboration, I hope to provide one possible platform for growth and improvement which other Seventh-day Adventist unions and conferences might find beneficial.
Bias

In qualitative studies, the researcher is the primary instrument for data collection (Merriam, 1998). My personal bias, as the researcher, came from two major areas. First, I have been one of the developers of the Adventist EDGE initiative from its very inception. This allowed me to help bridge gaps in understanding that occurred when administrators left or new ones joined at different points in the initiative development. This involvement afforded me with the ability to formulate questions that would help provide the details in the overall “vision” the EDGE developers were forming. Second, I have been a Seventh-day Adventist classroom teacher for 20 years, teaching in a variety of settings from Grades 1 through 10, including the one-room school. This experience provided me with some practical understanding of educational applications and helped me in the process of trying to define the continuum of specific behaviors for the Adventist EDGE initiative. I believe my bias has strengthened this study because of my close connection and “understanding” of the Seventh-day Adventist educational process.

Ethical Considerations

The Institutional Review Board at Andrews University reviewed my proposal of this study and ensured that all proper ethical concerns were appropriate. This study provided no physical or emotional risk to the participants. A unique Informed Consent Form was prepared for each of the three group samples (Forbes, 2007-2010a, sec. 14, pp. 1-3). The information included the purpose of the study, the criteria for participating, benefits, results of the study, voluntary participation in the study, and contact information. Each participant was free to agree or decline participation with no
repercussions. All private interviews and email sources are confidential. Of course, known among the group are the group discussions.

All participants and institutions received anonymity and confidentiality of their participation in the study (Forbes, 2007-2010a, sec. 1, pp. 1-3). Information regarding the level of participation and possible implementation between the eight conferences is confidential. It is my wish as the researcher to take precautions so this study does not foster a competitive spirit among the conferences, but rather a collaborative and cooperative spirit.

**Summary**

In summary, I used the Innovation Configuration process as my qualitative case study design. My decision to use an Innovation Configuration process was because of my interest in developing a written description of the components of the Adventist EDGE initiative, which would include variations of behavior ranging from ideal to unacceptable rather than focusing on a hypothesis. I chose three groups through purposeful sampling to discover, understand, and gain insight regarding the perceptions of the EDGE initiative. The collaborative process involved identifying the initial components, organizing the data, checking for additional components and variations, developing a configuration map, pilot testing, and refining.

I used coherence, consensus, and instrumental utility to establish the credibility of my study (Eisner, 1998). I also used investigator’s position, triangulation, and audit trail to ensure dependable results (Merriam, 1998). In the next chapter, I describe the context and the Innovation Configuration development process.
CHAPTER IV

THE INNOVATION CONFIGURATIONS

Introduction

I organized this chapter into two sections: the context, including the informants, and the Innovation Configuration development process. At the onset of this study, I intended to develop one Innovation Configuration for the Adventist EDGE initiative. However, as the project developed, it quickly became evident that because the EDGE initiative involved such a comprehensive change, it would require more than one Innovation Configuration to define the program. The Developers agreed that the school components and the teacher components would be the most critical components to identify in the Adventist EDGE initiative. Thus, my study includes two Innovation Configurations in chapters 5 and 6, one for the Adventist EDGE Teacher and one for the Adventist EDGE School.

The Context and the Informants

This section describes the environment where the study took place and the profiles of the three groups from which data were collected for the Innovation Configuration. The school system in which the study took place is the Southern Union Conference of Seventh-day Adventists, a part of the Seventh-day Adventist school system, which is the second largest private school system in the world (K12 Academics, 2004-2011). The system consists of 7,804 schools, colleges, and universities, with 84,997
teachers and 1,673,828 students world-wide (General Conference of Seventh-day Adventists, Department of Education, 2008). First, I provide an overview of the setting. Then, I describe three types of participants starting with the Developers, then the Expert Users, and finally the Various Level Users.

**Southern Union Conference of Seventh-day Adventists**

The Southern Union Conference covers eight states in the southeastern part of the United States. These states are Florida, Georgia, Tennessee, Alabama, Mississippi, Kentucky, North Carolina, and South Carolina. These states are geographically divided into eight individual conferences. These conferences are: (a) the Carolina Conference, serving North and South Carolina; (b) the Florida Conference, serving the state of Florida except the area west of the Apalachicola River; (c) Georgia-Cumberland Conference, serving Georgia, Eastern Tennessee, and Cherokee County in North Carolina; (d) Gulf States Conference, serving Alabama, Mississippi, and the area of Florida west of the Apalachicola River; (e) Kentucky-Tennessee Conference, serving Kentucky and western Tennessee; (f) South Atlantic Conference, serving regional conference churches in the Carolinas and North and Central Georgia; (g) South Central Conference, serving regional conference churches in Kentucky, Tennessee, Alabama, Mississippi, and the portion of Florida lying west of the Apalachicola River; and (h) Southeastern Conference, serving regional conference churches in Florida except the portion west of the Apalachicola River, and southern Georgia (Southern Union Conference of Seventh-day Adventists, 2002-2011). These conferences have diverse cultures. Several ethnic groups are

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2Regional Conferences are recognized organizational entities of the Seventh-day Adventist Church in the North American Division. The structure was formally adopted in 1944 at the Spring meeting of the General Conference Committee to provide for the organization of black-administered conferences where membership, finances, and territory warranted” (Felder, 2010, p. 42).
represented. Some conferences are much more representative of one culture than others, depending on their location.

Each of these eight conferences has one superintendent of education. Some conferences, depending upon number of students and schools, have associate superintendents as well. Superintendents and associates work with teachers hired in their respective conferences on a regular basis to make policies and recommendations for the school system within the Southern Union Conference. The superintendents serve on several committees to administer the work of the schools.

One of these committees was the Assessment Committee, assigned the task of taking an in-depth look at assessment in order to see what the Southern Union could do to move towards something more authentic than just standardized testing. The group began to study assessment and the more they studied assessment, the more they began to feel that authentic assessment and curriculum did not function separately from each other. They began to look at both assessment and curriculum together and soon came to realize that instruction played a vital role in both curriculum and assessment and that the three—curriculum, instruction, and assessment—would have to be considered as a complete package if there was going to be authentic assessment in our school system. So the committee was renamed the Curriculum, Instruction, and Assessment Committee (CIAC), which then began to work with all three categories to develop a program for the schools that would be research-based and display the very best in the learning environment. Thus, the Adventist EDGE initiative began which provided the content for this study. One of the primary methods to study the content included interviewing and observing informants.
The Informants

The CIAC group wanted the Adventist EDGE initiative based on valid research. We studied and restudied many ideas and learning theories as the EDGE began to take shape. We especially considered some of the ideas and theories of learning which appear to be progressive in the discovery of how the brain learns and functions. The formation of the initiative took on four basic categories (Ellis, 2005). First, there was the preliminary research, observation, and discussion of philosophy. This led to the formation of a theory about learning. Then there were the implications this theory had for the classroom. Finally, these ideas became an innovative program called the Adventist EDGE. In the next few paragraphs, I will briefly explain how we went through those stages.

Developers

The Southern Union Director of Education selected people from the CIAC to participate in the study to develop an operational definition for the Adventist EDGE. Twenty people consented, referred to as Developers in the study. These Developers represented seven of the eight conferences within the Southern Union and consisted of superintendents and associate superintendents, one school principal, the marketing consultant, and a Southern Adventist University professor. This formed a group of individuals who were experienced in classroom teaching and school administration with several holding doctorate degrees in the educational field. They also hold to strong ideas, as one might expect with such a large group of professionals.

Expert Users

Superintendents, representing the eight Southern Union conferences, suggested teachers whom they considered Adventist EDGE Users. Out of the 19 names provided,
seven of them consented to participate in the study. These seven teachers represented three of the eight conferences. Because the EDGE initiative was still in its infant stage at the time of this study, some of the conferences stated they did not feel they had any “expert” teachers to recommend. The seven teachers who agreed to participate in the study are teachers who have implemented the Adventist EDGE, as they understood it, in their classrooms.

Various Level Users

Because I wanted to use this study to describe what occurs in the Adventist EDGE initiative I needed a purposeful sampling from whom the most could be learned (Eisner, 1998; Merriam, 1998). The local superintendents selected a sample of 62 educators identified at various levels of development for the Adventist EDGE. These teachers represented every grade level from K-12 in the system and included those who may or may not have had any understanding of the Adventist EDGE. The purpose of this sampled group of educators was to test clarity of understanding of the innovation at all levels. Could all teachers, even at various levels of implementation, understand what the configuration map meant?

The Innovation Configuration Development Process

When implementing a new program or innovation, often attributes, goals, and requirements are described. While these criteria are important, it is also necessary to define the innovation in clear terms, depicting what it would look like when actually implemented. This way an innovation can become very clear and more easily implemented in the workplace.
Hall and Loucks (1981) observed that persons who claimed not to be implementing an innovation were in fact doing many of the same things as those who claimed to be users. In addition, they found those claiming to be users were not all doing the same things. Without specific clarity, there can be misconceptions between developers and users, leading to the crippling of an initiative. The Innovation Configuration attempts to break the innovation into operational parts, with clear description for each.

In using the Innovation Configuration terminology, the term *component* means the major features of the initiative defined in terms of materials, behaviors, or activities. The critical components are those components that are present when considering the innovation implemented. *Variations* are various ways of implementing the components. An *Innovation Configuration map* is the tool for identifying the specific component parts that might be seen as the innovation is implemented into the workplace (Henriquez-Roark, 1995).

**The Basic Procedure**

The first step was to acquire a basic idea of what the Developers and Expert Users thought was the Adventist EDGE. I gathered this preliminary information through two initial virtual interviews. In an effort to provide some structure and to “make sense” of the massive amount of information, I sorted the information into groups for EDGE teacher, EDGE school, and EDGE conference/union. Then, using the categories that were originally suggested by Fullan and St. Germain in the book, *Learning Places* (2006), I rearranged the data from the initial grouping under Fullan and St. Germain’s three
categories and further divided each of the three categories into subcategories as outlined below:

Section A: Shaping School-wide Contexts

1. Building on Strengths
2. Achieving Momentum
3. Linking Assessment Data to Teaching and Learning
4. Promoting Purpose and Community
5. Providing Learning Support

Section B: Improving Classroom Teaching

6. Sharing Ideas to Improve Classroom Learning
7. Focusing Student Interest and Attention
8. Engaging Student Thinking
9. Supporting Student Performance
10. Affirming Student Understanding

Section C: Sustaining Passion and Commitment

11. Supporting Professional Development
12. Making Life Fun and Work Meaningful

Each of these 12 subcategories I further divided into subcategories. Table 5 reflects this information.

The responses from these interviews provided a large amount of data I organized into three initial categories; EDGE teacher, EDGE school, EDGE conference/union, with approximately 80% of the information falling into the teacher and school categories. This initiative was too broad to fit into only one Innovation Configuration and I decided to
Table 5

Response Categories

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Building on Strengths</strong></td>
<td></td>
</tr>
<tr>
<td>The board, teachers, and staff</td>
<td>a) Operate on Biblical-based principles and the example of Christ</td>
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<td></td>
<td>b) Provide value, credibility, and accountability to every customer</td>
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<td></td>
<td>c) Work to make sure there are significant adults who make a personal connection and investment in each student</td>
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<td></td>
<td>e) Honor, value, and celebrate diversity at all levels</td>
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<td></td>
<td>f) Collaborate with home-schooling parents, neighboring and other educational entities</td>
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<tr>
<td>The educator/classroom</td>
<td>g) Facilitates a positive emotional climate for learning</td>
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<td></td>
<td>h) Shows kind and thoughtful behavior to each and every student</td>
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<td></td>
<td>i) Takes a personal interest in each student with his/her learning style and needs</td>
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<td></td>
<td>j) Infuses spiritual applications/information throughout the curriculum and school day</td>
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<tr>
<td>The student/child</td>
<td>k) Has a growing awareness of personal uniqueness and value to God</td>
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<td></td>
<td>l) Has a growing sense of intrinsic gifts which are nurtured and celebrated</td>
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<td></td>
<td>m) Thrives because of learner-centered instruction</td>
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<tr>
<td><strong>2. Achieving Momentum</strong></td>
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</tr>
<tr>
<td>The board, teachers, staff, and stakeholders</td>
<td>a) Recommend Seventh-day Adventist education where learners develop a personal relationship with Christ for life and eternity</td>
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<tr>
<td></td>
<td>b) Communicate clearly and frequently</td>
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<td></td>
<td>c) Succeed in doing what is expected of them</td>
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<td></td>
<td>d) Are actively involved</td>
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<td></td>
<td>e) Understand and use Adventist EDGE terminology</td>
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<td></td>
<td>f) Encourage dialog and collaboration at all levels</td>
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<td></td>
<td>g) Have a shared vision and mission statement</td>
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<td></td>
<td>h) Implement and systematically assess clearly-stated short and long-range goals</td>
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<tr>
<td></td>
<td>i) Maintain an awareness of the latest developments in Adventist EDGE</td>
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<td></td>
<td>j) Use a customer service plan of action at all levels</td>
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<tr>
<td></td>
<td>k) Implement accreditation committee recommendations and self-study action plans</td>
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<tr>
<td>The parents</td>
<td>l) Have an awareness of authentic types of assessment</td>
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<tr>
<td></td>
<td>m) Have an awareness of the natural cycle of learning</td>
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<tr>
<td></td>
<td>n) Have an awareness of learning styles and their effect on relationships</td>
</tr>
<tr>
<td>The teacher</td>
<td>o) Is well-prepared every day to meet the diverse needs of each child</td>
</tr>
<tr>
<td></td>
<td>p) Systematically includes home, church, and community in the learning process</td>
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<tr>
<td>The conference and union leadership</td>
<td>q) Function on a collaborative basis at all levels</td>
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<tr>
<td></td>
<td>r) Function as servant-leaders and coaches</td>
</tr>
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<td></td>
<td>s) Provide support and/or an action plan to facilitate teacher success</td>
</tr>
<tr>
<td><strong>3. Linking Assessment Data to Teaching and Learning</strong></td>
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</tr>
<tr>
<td>The teacher</td>
<td>a) Measures student progress and plans instruction using data from a variety of assessments such as:</td>
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<td></td>
<td>• Essay/short answer</td>
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<tr>
<td></td>
<td>• Matching</td>
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<td>• True/False</td>
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<td></td>
<td>• Multiple-choice</td>
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<td></td>
<td>• Traditional written assessments</td>
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<tr>
<td></td>
<td>• Performance-based assessment</td>
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</tbody>
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Table 5—Continued.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description</th>
</tr>
</thead>
</table>
| The teacher (continued)      | • Demonstration and performances  
|                              | • Peer assessments  
|                              | • Portfolios  
|                              | • Products  
|                              | • Rubrics  
|                              | • Self-assessments  
|                              | • Simulation  
|                              | • Student-led conferences  
|                              | • Journals  
| b) Measures and analyzes data for both individual and whole-group performance: |  
|                              | ► Criterion referenced  
|                              | ► Norm referenced  
| c) Uses:                    | Observation  
|                              | Anecdotal records  
|                              | Interviews  
| d) Uses data for appropriate instructional placement  
| e) Uses data to re-teach for mastery  
| The student and teacher collaboratively | f) Focus on mastery learning rather than grade placement  
|                              | g) Use assessment to track progress  
|                              | h) Use data from assessment for individual, prescriptive learning  

4. PROMOTING PURPOSE AND COMMUNITY

The school board, teachers, staff, students, and parents  

- a) Have a working partnership among home, school and church  
- b) Provide well-maintained and visually-inviting building(s) & classrooms  
- c) Celebrate learning  
- d) Review the school’s vision and mission statements regularly  
- e) Seek actively to fulfill the school’s vision and mission  
- f) Follow an effective customer-centered resolution process  
- g) Provide clear feedback and accountability in a safe and nurturing manner to all team members  
- h) Use experiences to learn and grow on a continuous basis  

The teacher and students  

- i) Participate in diverse and rich expressions of spirituality  
- j) Are involved in outreach on a regular basis  
- See themselves as members of a global community  
- k) Extend spirituality from the school to the home and church community  
- l) Realize each has a strength that is vital for the group  

5. PROVIDING LEARNING SUPPORT

The school board, teachers, and staff  

- a) Model spiritual growth  
- b) Collaborate for the success of each student  
- c) Plan for funding and acquisition of materials  
- d) Utilize community resources to enrich learning  
- e) Develop and maintain a technology master plan  

The teacher  

- f) Communicates curriculum goals to students, parents and school board  

6. SHARING IDEAS TO IMPROVE CLASSROOM LEARNING

Teaching professionals  

- a) Support and nurture one another  
- b) Are open and ready to learn and share with each other  

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Table 5—Continued.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description</th>
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<tbody>
<tr>
<td>The teacher</td>
<td>7. <strong>FOCUSING STUDENT INTEREST AND ATTENTION</strong></td>
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<tr>
<td></td>
<td>a) Integrates Biblical principles throughout the learning experience</td>
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<tr>
<td></td>
<td>b) Provides a cooperative learning classroom setting</td>
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<td></td>
<td>c) Uses the 4MAT framework for intentional, conceptual, and differentiated instruction</td>
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<td></td>
<td>d) Facilitates the instructional program to be spiritually attractive and relevant to the students</td>
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<td></td>
<td>e) Uses <strong>techniques</strong>: Effective steps designed to organize or manage the environment creating an inclusive, supportive and caring classroom</td>
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<td></td>
<td>f) Uses <strong>structures</strong>: Content free, planned processes designed to organize interaction of individuals to build a learning community</td>
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<td></td>
<td>g) Uses <strong>strategies</strong>: Research-based methods of teaching that leads to student learning</td>
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<td></td>
<td>h) Integrates all subject areas in an authentic, relevant, and meaningful way</td>
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<tr>
<td></td>
<td>i) Integrates Language Arts and Comprehensive Literacy components across the curriculum where applicable:</td>
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<tr>
<td></td>
<td>• Comprehension strategies</td>
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<tr>
<td></td>
<td>• Reading</td>
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<td></td>
<td>• Writing</td>
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<td></td>
<td>• Listening to and discussing stories</td>
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<td></td>
<td>• Grammar in speaking and writing</td>
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<td></td>
<td>• Phonemic awareness</td>
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<tr>
<td></td>
<td>• Phonics</td>
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<td>• Fluency</td>
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<td></td>
<td>• Vocabulary</td>
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<td></td>
<td>j) Aligns integrated elementary language arts components to include systematic, comprehensive, explicit, and multisensory instruction</td>
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<td>k) Integrates age-appropriate technology into the curriculum including but not limited to:</td>
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<td></td>
<td>• Programs for instruction and learning</td>
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<td></td>
<td>• Keyboarding and computer literacy</td>
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<td></td>
<td>• Programs for academic skill remediation</td>
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<td></td>
<td>• Use of word processing, and other programs such as PowerPoint, Excel, etc.</td>
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<td></td>
<td>• Acceptable use of internet resources for research and information</td>
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<td></td>
<td>• A progressive understanding of how to discriminate for positive web use and information</td>
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<tr>
<td></td>
<td>• Students have regular access to technology tools and online resources</td>
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<td>l) Integrates math conceptually so students see relevance and connection in the following:</td>
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<td>• Problem solving</td>
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<td></td>
<td>• Reasoning and proof</td>
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<td></td>
<td>• Communication</td>
</tr>
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<td></td>
<td>• Representations</td>
</tr>
<tr>
<td></td>
<td>m) Ensures the curriculum, instruction, and assessments are developmentally appropriate</td>
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<td></td>
<td>n) Develops lessons from standards and benchmarks of what the students should know and be able to do</td>
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<tr>
<td></td>
<td>o) Shares standards with the parents and students when appropriate</td>
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<td></td>
<td>8. <strong>ENGAGING STUDENT THINKING (WHERE DEVELOPMENTALLY APPROPRIATE)</strong></td>
</tr>
<tr>
<td></td>
<td>The students:</td>
</tr>
<tr>
<td></td>
<td>a) Develop a personal relationship with Christ</td>
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<td></td>
<td>b) Know what GREAT education means to them personally</td>
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<td></td>
<td>c) Connect to why their current classes are relevant</td>
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<td></td>
<td>d) Take ownership for their learning</td>
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<td></td>
<td>e) Exhibit critical thinking and problem solving skills</td>
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<td></td>
<td>f) Articulate the progress they are making in their learning process to their parents</td>
</tr>
<tr>
<td></td>
<td>g) Engage in open-ended activities that lead to higher-order thinking</td>
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<td></td>
<td>h) Practice teamwork, networking, and understand the value of the group process</td>
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Table 5—Continued.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description</th>
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<tbody>
<tr>
<td>9. SUPPORTING STUDENT PERFORMANCE (WHERE DEVELOPMENTALLY APPROPRIATE)</td>
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</tr>
<tr>
<td>The teacher</td>
<td>a) Helps students connect their learning in an experiential and productive way</td>
</tr>
<tr>
<td></td>
<td>b) Models a balanced foundation between the acquisition and use of knowledge</td>
</tr>
<tr>
<td>The students</td>
<td>c) Know how to self-assess their performances.</td>
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<td></td>
<td>d) Participate in student-led parent/teacher conferences.</td>
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<td></td>
<td>e) Become self-directed learners.</td>
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<tr>
<td>10. AFFIRMING STUDENT UNDERSTANDING (WHERE DEVELOPMENTALLY APPROPRIATE)</td>
<td></td>
</tr>
<tr>
<td>The teacher</td>
<td>a) Provides for multiple expressions of subject matter</td>
</tr>
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<td></td>
<td>b) Encourages participation in self-testing</td>
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<tr>
<td></td>
<td>c) Uses various types of individual affirmation for progress</td>
</tr>
<tr>
<td>The students</td>
<td>d) Share projects, skits, programs, etc. with each other and the community</td>
</tr>
<tr>
<td></td>
<td>e) Show personal evidence that learning is becoming a life-long skill</td>
</tr>
<tr>
<td>11. SUPPORTING PROFESSIONAL DEVELOPMENT</td>
<td></td>
</tr>
<tr>
<td>The conference/union/school administration/school boards</td>
<td>a) Provide release time and support for regular study group / collaborative meetings throughout the school year. (See Study Group Configuration in EDGE Handbook, p. 73)</td>
</tr>
<tr>
<td>The union and conference</td>
<td>b) Provide relevant and meaningful staff development that adheres to the adopted Adventist EDGE training program</td>
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<tr>
<td></td>
<td>c) Collaborate to:</td>
</tr>
<tr>
<td></td>
<td>• Establish a clear vision for implementing the Adventist EDGE</td>
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<tr>
<td></td>
<td>• Communicate the Adventist EDGE vision to conference administrators, pastors, teachers, school boards, families, and constituents</td>
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<td></td>
<td>• Identify curriculum resources that support Adventist EDGE goals</td>
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<td></td>
<td>• Fund Adventist EDGE initiatives</td>
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<td></td>
<td>• Provide staff development for teachers</td>
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<td></td>
<td>• Identify and mentor candidates for administrative leadership whose vision is aligned with Adventist EDGE philosophy and goals</td>
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<tr>
<td></td>
<td>• Examine results to redirect and refine the EDGE vision and components</td>
</tr>
<tr>
<td>The conference and school leadership</td>
<td>d) Collaborate to:</td>
</tr>
<tr>
<td></td>
<td>• Set a clear vision for implementing Adventist EDGE goals locally</td>
</tr>
<tr>
<td></td>
<td>• Communicate the Adventist EDGE vision to local pastors, teachers, school boards, families, and constituents</td>
</tr>
<tr>
<td>The teachers</td>
<td>e) Participate in:</td>
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<tr>
<td></td>
<td>• Regular, on-going, collaborative professional development using the training model (i.e. study groups or other collaborative professional growth forums)</td>
</tr>
<tr>
<td>12. MAKING LIFE FUN AND WORK MEANINGFUL</td>
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<tr>
<td>The teachers</td>
<td>a) Demonstrate a passion about their work because they are called of God</td>
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<td></td>
<td>b) Strive to make a positive difference with every student in spite of circumstances</td>
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<tr>
<td>The students</td>
<td>c) Feel learning is fun</td>
</tr>
<tr>
<td></td>
<td>d) Demonstrate enthusiasm about their work</td>
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<td></td>
<td>e) See themselves as a community of learners</td>
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<td></td>
<td>f) Are reaching their full potential through provided opportunities</td>
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<td></td>
<td>g) Feel validated for their efforts</td>
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Table 5—Continued.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Description</th>
</tr>
</thead>
</table>
| The parents, teachers, and students | h) Are partners in the student’s learning processes  
   i) Celebrate student success quickly and frequently |
| The conference and union | j) Celebrate GREAT teaching by honoring exemplary teachers  
   k) Show a passion for Adventist EDGE |


develop Innovation Configurations for the two categories with the most data, teacher and school. The basic procedure involved developing two configuration maps of the components and variations: One described the teacher components, and the other described the school components. The general procedures for developing the Innovation Configuration maps are summarized in the following flow chart in Figure 4, which presents a variation of the flow chart developed by Hord, Stiegelbauer, et al. (2006).

**Innovation Configuration: Adventist EDGE Teacher Components**

After analyzing and categorizing the feedback provided from the initial interview into the teacher category, I formed a beginning list of components. With the focus on the EDGE teacher, this list was then presented to the Developers and the Expert Users for further discussion and clarification using *GoToMeeting*™ (Citrix, 1997-2011), phone calls, and emails. I incorporated the ideas and concepts provided by the Developers and Expert Users into the developing list of components.

As I explained previously in this chapter, I organized the initial data using Fullan and St. Germain’s (2006) 12 categories. Once the data were placed under the appropriate category, I further organized each category into subcategories labeled *The Teacher; The Student; The Parents, Teachers, and Students; The Conference and School Leadership;*
Figure 4. Ladder or scaffolding of the steps to construct the IC. From Measuring Implementation in Schools: Innovation Configurations (p. 14), by S. M. Hord and S. M. Stiegelbauer, et al., 2006, Austin, TX: Southwest Educational Development Laboratory. Adapted with permission.
The Conference and the Union (refer to Table 5 for more specific details.) Using these subcategories, I pulled data that pertained to teachers and formed a new list for the teacher components. Then, I presented these newly organized teacher components to the Developers for further collaboration and discussion.

For 22 months, extensive dialogue and fine-tuning of the components continued. The discussion typically took place among the Developers interpreting and identifying the patterns and perspectives. The Expert Users further clarified the contextualization of the list and its variations for classroom and school applications. Eight of these deliberations were held over GoToMeeting™ (Citrix, 1997-2011), and 22 occurred with individual emails. At the conclusion of the 22 months, both the Developers and Expert Users reached consensus on the teacher components. The original coalesced into six major components. These components became the (initial) Innovation Configuration for the Adventist EDGE Teacher:

1. Integration of Faith and Learning
2. Determining the Learners’ Instructional Needs
3. Delivering Instruction
4. Planning Curriculum
5. The Learning Environment

My next task was to define what each of these six components would look like in a continuum from ideal, to progressing, to unacceptable. First, in September of 2007, I developed a draft of the core elements and presented this draft to the Developers via email, asking them to provide feedback regarding their response to the draft. Each of the
20 Developers received individual emails. Five Developers responded, although I sent out a second and third email to obtain their responses (Forbes, 2007-2010a, sec. 5, pp. 1-22). From those responses, I made changes and further refined the components as the configuration map emerged. On January 3, 16, 18, and 24, 2008, I met with the Developers via GoToMeeting™ (Citrix, 1997-2011) to refine the components, discussing them section by section. Two Developers of the 20 participating were not always able to attend the GoToMeeting™ sessions, and I received input from them via phone and email to ensure they were comfortable with the revisions made to the configuration map.

Next, the local superintendents provided 62 names of teachers from their conference they considered at the various stages of the Adventist EDGE implementation, from non-implementation to full implementation for a pilot test. It took from February until April of 2008 to gather the names from each conference. Of those 62 names, 12 teachers agreed to participate in the study. On May 29, 2008, the January 2008 version of the configuration map was sent via SurveyMonkey™ (SurveyMonkey, 1999-2011) to these teachers asking for their response, observations, and questions, regarding the configuration map. By August of 2008, I received the feedback, revising the configuration map to reflect input from the Various Level Users.

I then presented the changes to the Developers. There were 4 days of collaboration and discussions back and forth via phone and email with the Developers and Expert Users until they reached a consensus. Consensus, in this study, means that each participant in the study agreed to accept the Teacher IC as representing the Adventist EDGE Teacher with the understanding that the Teacher IC would continue to grow and evolve in the future. With some minor adjustments in wording and corrections
in mechanics, the completed configuration map resulted in an Innovation Configuration reflecting what various levels of implementation might look like as a teacher implemented them. I followed the same procedure to develop the Innovation Configuration for the school components.

**Innovation Configuration: Adventist EDGE School Components**

Again, after analyzing and categorizing the feedback provided from the initial interview into the school category (Fullan & St. Germain, 2006) and looking at the EDGE Handbook (Southern Union Conference of Seventh-day Adventists, Office of Education, 2006), I formed a list of components to help identify an EDGE School. As with the development of the Teacher IC, the discussion was first among the Developers. I sent nine emails, between April and December 2007, to the developers asking for their input as the document emerged from a preliminary form to a first draft. During the month of January 2008, I conducted four GoToMeeting™ (Citrix, 1997-2011) sessions with the Developers. Two Developers could not attend these sessions due to time challenges and provided feedback individually via phone and email. A draft of the following five components emerged.

1. God Centered: Integration of Faith and Community
2. Results Oriented: Technological
3. Environment that Nurtures: Invitational
4. Aligned with Adventist and National Standards: Instruction
5. Team Effort: Collaborative and Supportive Community.
These components were broken down into four levels of implementation: Unacceptable, Emerging, Progressing, and Ideal. These levels describe what the components might look like in different stages of implementation.

Next, the IC was pilot tested in two schools; one school was considered an Adventist EDGE School while the other was considered to be in the initial stage of implementation. One school was a two-teacher school and the other a 12-teacher school. One of these schools had experienced differences of opinions that became quite painful in the first school visit regarding Adventist EDGE recognition (see chapter 1). That school pilot tested the IC for clarity to address the unresolved issue identified during the first visit. Feedback from both schools was very valuable, both in making sure we clarified past confusions, and by ensuring we were actually communicating what we intended in the school IC.

Because of these pilot tests, the Developers and the Expert Users adjusted the IC for further clarification six times from February to August 2008. The Adventist EDGE School IC was ready to share with schools union-wide for implementation. This completed the development of the Adventist EDGE School Innovation Configuration and the Adventist EDGE Teacher Innovation Configuration representing what the Developers and Expert Users perceived to be components of the Adventist EDGE Teacher and School. I have described the process of developing the IC and, in the next section, I will reflect on the experience.

**Reflection on the IC Process**

In discussing qualitative studies, Merriam (1998) states that this process is highly intuitive and a researcher cannot always explain where an insight came from or how the
relationship of the data was discovered. Merriam (1998) goes on to state that the “real learning can only take place in the doing” (p. 156). My research study was emergent in nature and it was not possible to predict the outcome. For example, when this study was first proposed, the proposal included using CBAM to find the Levels of Use (LoU) of the Adventist EDGE. As the study progressed, it became apparent early in the process that because of the comprehensive and complex nature of the Adventist EDGE initiative, finding one Innovation Configuration with its LoU would not work. Two innovations needed defining before moving on to study LoU. As the study emerged, I decided it would be better to find the LoU in a separate study. Completing the IC process with this amount of data would be time consuming and, including the LoU, would only prolong the study.

Another issue that arose was the number of Developers involved who must reach a consensus. Because of the logistics of time and geographical locations, the collaborative process occurred as a group discussion through a virtual, collaborative meeting. Although numerous emails and private phone conversations about various components and ideas occurred, the group meetings helped to expedite the process. Going back and forth between 20 Developers individually for every change until reaching a consensus was extremely time-consuming. The virtual discussion meetings promoted listening to each other’s ideas and included some debate until all agreed to accept the Teacher IC as representing the Adventist EDGE School. This was with the understanding that the School IC would continue to grow and evolve in the future.

In Tables 6 and 7, I present a quantitative picture of who was involved in providing the data. The “Initial Interview” column represents the number of people who
Table 6

Data Chart of EDGE Study Participation

<table>
<thead>
<tr>
<th>Description</th>
<th>Contacted</th>
<th>Participants</th>
<th>Initial Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developers</td>
<td>27</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Expert Users</td>
<td>20</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Various Level Users</td>
<td>62</td>
<td>12</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>NA</strong></td>
<td><strong>39</strong></td>
<td><strong>14</strong></td>
</tr>
</tbody>
</table>

Table 7

Data Chart of EDGE Responses

<table>
<thead>
<tr>
<th>Number of Responses</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of feedback responses from email from all groups</td>
<td>85</td>
</tr>
<tr>
<td>Number of virtual discussion meetings with Developers</td>
<td>7</td>
</tr>
<tr>
<td>Number of teachers participating in the pilot test for Teacher IC</td>
<td>12</td>
</tr>
<tr>
<td>Grades represented by the teachers in the pilot test for Teacher IC</td>
<td>K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12</td>
</tr>
<tr>
<td>Number of schools participating in the pilot test for School IC</td>
<td>2</td>
</tr>
</tbody>
</table>

participated in the gathering of the first information that served as the beginning for the direction of the questionnaires. The “Participants” column provides the actual number of people in each category who responded to the questionnaires and participated in the discussions. The column labeled “Contacted” represents the number of persons invited to participate.

The development of the two Innovation Configurations, one for the Adventist EDGE Teacher of Excellence and one for the Adventist EDGE School of Excellence took a total of 22 months from the time the project was voted for approval by the Southern Union (see Appendix G) and the two ICs were ready to share with the stakeholders. This timeframe was not predetermined, but evolved around the regular work schedules of teachers and administrators. The feedback and processing required adequate time to reach
total group consensus. In the end, all 20 Developers and each of the seven Expert Users involved in the study accepted the teacher IC and the school IC as the baseline for the Adventist EDGE initiative. They also understood that these ICs would be growing and developing documents.

It is interesting to note that at first it was difficult for administrators and teachers to commit to participate in this study. However, as the study developed, a clarity and understanding of the value of the study began to unfold. Some of those initially invited to participate in the study but who had not responded, later responded in the affirmative, offering to participate if it was not too late. I believe there were two main reasons for this occurrence. One, as the Southern Union committee and meetings continually referred to the Adventist EDGE in more specific details, the conceptual differences and ideas became more and more obvious. Two, while these discrepancies were becoming more apparent, the awareness of this study increased. More and more, those participating in the study began to see how the results would help resolve these differences and provide clarity with descriptive behaviors for the initiative. The process was one of discovery: The teachers and administrators discovered the importance of what the Innovation Configuration could provide for the Southern Union and experienced the power of collaborative and effective communication in uniting to clarify the specifics of a common goal. As discrepancies arose, others would refer to the need of the results of the study to provide a framework for resolving differences. This growing understanding fueled the passion of the Developers, increased participation, and responses in the study came more and more quickly.
Summary

This study took place in the Southern Union Conference of Seventh-day Adventists. Twenty Developers, seven Expert Users, and 12 Various Level Users, representing all grade levels K-12, participated in the 4-year study. I identified the components of the EDGE initiative with a continuum of behaviors from ideal to unacceptable for each component. I developed two Innovation Configurations for the Adventist EDGE initiative; the Adventist EDGE Teacher Innovation Configuration, and the Adventist EDGE School Innovation Configuration.

In the next two chapters, I will identify and describe the Adventist EDGE Teacher Innovation Configuration and the Adventist EDGE School Innovation Configuration.
CHAPTER V

THE ADVENTIST EDGE TEACHER INNOVATION CONFIGURATION MAP AS DESCRIBED BY THE SEVENTH-DAY ADVENTIST CONFERENCES IN THE SOUTHERN UNION

Introduction

The Teacher Innovation Configuration map (see Tables 8-13) was developed from the six components of the teacher Innovation Configuration identified by the Developers and Expert Users for the Adventist EDGE. I also formatted this map into a checklist (see Appendix E) to provide a practical tool for teachers and administrators to use in the application of EDGE for teachers. Both tools have six major components with specific descriptions for each. These descriptions have three levels of implementation: Ideal, Progressing, and Unacceptable. Each level describes a particular behavior that fits in each respective category. A definition of terms provides clarity for the map and checklist.

Definition of Terms

**Learner:** All children and students in early childhood programs, elementary schools, and secondary schools involved in the Adventist EDGE initiative.

**Mentorship Plan:** The *Valuegenesis* study reported that if all three environments (home, church, & school) are working effectively together, the probability of young people building a strong intrinsic faith in Jesus is 99%. It would be the role of the teacher to facilitate a plan or to ensure that a mentorship plan is in place (Gillespie, Donahue, Boyatt, & Gane, 1989).
### Table 8

**Teacher Innovation Configuration Map With Fidelity Lines, Component 1: Integration of Faith and Learning**

#### CONTEXTUAL SETTING

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Intentionally facilitates a positive emotional climate for learning at all times.</td>
<td>Strives to make a positive difference with each and every learner, communicating a personal interest in his/her learning style and needs</td>
<td>Faith is integrated into all subject areas</td>
</tr>
</tbody>
</table>

#### ILLUSTRATIVE SETTING

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Teachers share stories of how others were called by God at every opportunity</td>
<td>Teachers talk passionately about their work, repeatedly sharing about how God called them to their work</td>
<td>Teachers share stories of how others were called by God as it fits in the Bible class curriculum</td>
</tr>
</tbody>
</table>

#### CONCEPTUAL SETTING

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily Bible reading, singing, and prayer includes intentional spiritual activities that are interactive, attractive, and relevant to the learners</td>
<td>Daily Bible reading, singing, and prayer includes no intentional spiritual relevancy to learners</td>
<td>Daily worship is only read from a story or worship book and spiritual activities are not intentionally attractive or relevant to the learners</td>
</tr>
</tbody>
</table>
Table 8—Continued.

<table>
<thead>
<tr>
<th>EXPERIENCIAL SETTING</th>
<th>Ideal 1</th>
<th>Ideal 2</th>
<th>Ideal 3</th>
<th>Progressing 1</th>
<th>Progressing 2</th>
<th>Progressing 3</th>
<th>Unacceptable 1</th>
<th>Unacceptable 2</th>
<th>Unacceptable 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>A personal interest is taken in each learner with opportunities to discuss spiritual things or pray with each learner sought at least once a week</td>
<td>There is a systematic plan for the school/center to extend spirituality to the home, church, and community</td>
<td>A mentorship plan is designed so each learner has at least one of three significant adults who consistently connect to him/her*</td>
<td>A personal interest is taken in each learner with opportunities to discuss spiritual things or pray with each learner at various times</td>
<td>There is a systematic plan for the school/center to extend spirituality to one of these: the home, church, or community</td>
<td>A mentorship plan is designed so each learner has at least one of two significant adults who consistently connect to him/her*</td>
<td>Interest in learning and praying is given as only to the group as whole, without any individual attention</td>
<td>There is no systematic plan for the school/center to extend spirituality to the home, church, or community</td>
<td>There is no mentorship plan in place for each learner to have significant adults who consistently connect to him/her</td>
<td></td>
</tr>
</tbody>
</table>

*Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
### Table 9

**Teacher Innovation Configuration Map With Fidelity Lines, Component 2: Determining the Learners’ Instructional Needs**

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td><strong>1</strong></td>
<td><strong>1</strong></td>
</tr>
<tr>
<td><strong>2</strong></td>
<td><strong>2</strong></td>
<td><strong>2</strong></td>
</tr>
<tr>
<td><strong>3</strong></td>
<td><strong>3</strong></td>
<td><strong>3</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Uses standardized tests appropriately to help determine the strengths and weakness of each learner</th>
<th>Uses concrete data to group learners for:</th>
<th>Learners are not grouped for differentiated instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses all of the following items:</td>
<td>Uses 10 to 14 of the following items:</td>
<td>Does not use standardized tests to appropriately determine the strengths and weakness of the class or individual learner</td>
</tr>
<tr>
<td>- Informal teacher assessments:</td>
<td>- Informal teacher assessments:</td>
<td>- Formal teacher-generated assessments:</td>
</tr>
<tr>
<td>o Observation</td>
<td>o Observation</td>
<td>o Essay/short answer</td>
</tr>
<tr>
<td>o Anecdotal records</td>
<td>o Anecdotal records</td>
<td>o Matching</td>
</tr>
<tr>
<td>- Formal teacher-generated assessments:</td>
<td>- Formal teacher-generated assessments:</td>
<td>o True/False</td>
</tr>
<tr>
<td>o Essay/short answer</td>
<td>o Essay/short answer</td>
<td>o Multiple Choice</td>
</tr>
<tr>
<td>o Matching</td>
<td>o Matching</td>
<td>o True/False</td>
</tr>
<tr>
<td>o True/False</td>
<td>o True/False</td>
<td>o Multiple Choice</td>
</tr>
<tr>
<td>o Multiple Choice</td>
<td>o Multiple Choice</td>
<td>o Traditional written assessments</td>
</tr>
<tr>
<td>o Traditional written assessments</td>
<td>o Traditional written assessments</td>
<td>- Learner-generated assessments:</td>
</tr>
<tr>
<td>- Learner-generated assessments:</td>
<td>- Learner-generated assessments:</td>
<td>o Self-assessments</td>
</tr>
<tr>
<td>o Self-assessments</td>
<td>o Self-assessments</td>
<td>o Journals</td>
</tr>
<tr>
<td>o Interviews/</td>
<td>o Interviews/</td>
<td>o Portfolios</td>
</tr>
<tr>
<td>conversations</td>
<td>conversations</td>
<td>o Learner-led conferences</td>
</tr>
<tr>
<td>- Collaboratively-generated assessments:</td>
<td>- Collaboratively-generated assessments:</td>
<td>o Demonstrations and performances</td>
</tr>
<tr>
<td>o Interviews/</td>
<td>o Interviews/</td>
<td>o Collaboratively-generated assessments:</td>
</tr>
<tr>
<td>conversations</td>
<td>conversations</td>
<td>o Rubrics</td>
</tr>
<tr>
<td>o Peer assessments</td>
<td>o Peer assessments</td>
<td>o Learner-generated assessments:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Self-assessments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Journals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Portfolios</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Learner-led conferences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Collaboratively-generated assessments:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Interviews/ conversations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Rubrics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Peer assessments</td>
</tr>
</tbody>
</table>

**Note:** A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
<table>
<thead>
<tr>
<th></th>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperative</td>
<td>Current research on the brain and learning is intentionally incorporated into all daily instruction</td>
<td>The 4MAT framework is used 80% of the time for providing intentional, conceptual, and differentiated instruction; integrating various subject areas in an authentic, relevant, and meaningful way (see pp. 55-64)</td>
<td>Cooperative Learning is used less than weekly (see IC on pp. 66 &amp; 67)</td>
</tr>
<tr>
<td>Learning is the essence of the classroom setting (see IC pages. 66 &amp; 67)</td>
<td>Current research on the brain and learning is intentionally incorporated into some instruction</td>
<td>The 4MAT framework is used less than 80% of the time for providing intentional, conceptual, and differentiated instruction (see pp. 55-64)</td>
<td>Current research on the brain and learning is not understood or intentionally incorporated into instruction</td>
</tr>
<tr>
<td>Curriculum, instruction, and assessments are developmentally and academically appropriate for every learner</td>
<td>Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of each learner every day</td>
<td>Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of all learners every day</td>
<td>The 4MAT framework is not used to provide intentional, conceptual, and differentiated instruction (see pp. 55-64)</td>
</tr>
<tr>
<td>Mastery learning rather than grade placement is the focus in all subject areas</td>
<td>Curriculum, instruction, and assessments are developmentally and academically appropriate for most learners</td>
<td>Mastery learning rather than grade placement is the focus in basic skills subjects</td>
<td>Curriculum, instruction, and assessments focus on grade levels instead of using developmentally and academically appropriate instruction for learners</td>
</tr>
<tr>
<td>Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of each learner every day</td>
<td>Grade placement rather than mastery learning is the focus</td>
<td>Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of almost all learners occasionally</td>
<td></td>
</tr>
</tbody>
</table>

*Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.*
Table 11  
*Teacher Innovation Configuration Map With Fidelity Lines, Component 4: Planning Curriculum*

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
</table>
| Develops all lessons from standards and benchmarks of what the learners should know and be able to do (see Southern Union Standards) | Integrates all the following technology into the curriculum with progressing learner-appropriateness:  
- Programs for instruction, skill remediation, keyboarding and computer literacy  
- Acceptable use of Internet resources for research and information  
- Learners have regular access to technology tools and online resources  
- Learners progressively demonstrate understanding of how to discriminate for positive web use and information  
- Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc. | Develops lessons from textbooks  
Does not integrate two or more subject areas in an authentic, relevant, and meaningful way  
Does not integrate the following technology into the curriculum with progressing learner-appropriateness:  
- Programs for instruction, skill remediation, keyboarding and computer literacy  
- Acceptable use of Internet resources for research and information  
- Learners have regular access to technology tools and online resources  
- There is a progressive understanding of how to discriminate for positive web use and information  
- Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc. |
| Develops some lessons from standards and benchmarks of what the learners should know and be able to do (see Southern Union Standards) | Integrates two subject areas in an authentic, relevant, and meaningful way every day | Does not integrate two or more subject areas in an authentic, relevant, and meaningful way |
| Does not integrate two or more subject areas in an authentic, relevant, and meaningful way | Integrates most of the following technology into the curriculum with progressing learner-appropriateness:  
- Programs for instruction, skill remediation, keyboarding and computer literacy  
- Acceptable use of Internet resources for research and information  
- Learners have regular access to technology tools and online resources  
- Learners progressively demonstrate understanding of how to discriminate for positive web use and information  
- Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc. | Does not integrate the following technology into the curriculum with progressing learner-appropriateness:  
- Programs for instruction, skill remediation, keyboarding and computer literacy  
- Acceptable use of Internet resources for research and information  
- Learners have regular access to technology tools and online resources  
- There is a progressive understanding of how to discriminate for positive web use and information  
- Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc. |
<table>
<thead>
<tr>
<th>4a</th>
<th>4b</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Arts and Comprehensive Literacy integration: <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and discussing, grammar in speaking and writing into three or more subject areas in the following ways: <strong>Comprehensively</strong> – Includes all components of language arts skill, not just reading <strong>Aligned</strong> – All content; spelling, vocabulary, handwriting, are integrated cohesively into the lessons <strong>Systematically</strong> – A routine method repeated over and over again <strong>Explicitly</strong> – Direct and methodical introduction is provided for new material - reading and writing - listening to and discussion - grammar in speaking and writing</td>
<td>Language Arts and Comprehensive Literacy integration: <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening and discussing, grammar in speaking and writing into three or more subject areas</td>
<td>Integrates all math lessons conceptually so learners see relevance and connections to other subject areas in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td>Language Arts and Comprehensive Literacy integration: <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening and discussing, grammar in speaking and writing into three or more subject areas</td>
<td>Language Arts and Comprehensive Literacy integration: <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening to and discussion, grammar in speaking and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td>Language Arts and Comprehensive Literacy integration: <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Language Arts and Comprehensive Literacy integration: <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
<tr>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Elementary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td><strong>Language Arts and Comprehensive Literacy integration:</strong> <strong>Secondary</strong>- Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing</td>
<td>Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following: - Problem solving - Reasoning and proof - Communication Representations</td>
</tr>
</tbody>
</table>

**Note:** A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
### Table 12

**Teacher Innovation Configuration Map With Fidelity Lines, Component 5: The Learning Environment**

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Learners can articulate what the acronym GREAT stands for and what it means to them personally</td>
<td>Learners exhibit the following: - Perform self-assessments/self-testing, and are self-monitoring - Show responsibility for doing assignments and ownership for grades</td>
<td>Learners do not know what the acronym GREAT means</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Learners regularly: - Share projects, skits, programs, etc. with others and the community - Participate in learner-led parent/teacher conference - Demonstrate value of group work</td>
<td>Learners often do three or four of the following: - Tell how they are validated for their efforts - Exhibit critical thinking and problem solving skills - Share how learning is fun - Exhibit specific study skills when appropriate</td>
<td>Learners usually do not do more than one or two of the following: - Tell how they are validated for their efforts - Exhibit critical thinking and problem solving skills - Share how learning is fun - Exhibit specific study skills when appropriate</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Learners do both of the following: - Perform self-assessments/self-testing, and are self-monitoring - Show responsibility for doing assignments and ownership for grades</td>
<td>Learners do one of the following: - Perform self-assessments/self-testing, and are self-monitoring. - Show responsibility for doing assignments and ownership for grades</td>
<td>Learners do not do any of the following: - Perform self-assessments/self-testing, and are self-monitoring - Show responsibility for doing assignments and ownership for grades</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Learners exhibit the following: - Show kindness to others. - Find ways to use each other’s innate gifts - Know and practice a process for solving conflicts</td>
<td>Learners exhibit one or two of the following: - Show kindness to others - Find ways to use each other’s innate gifts - Know and practice a process for solving conflicts</td>
<td>Learners mostly: - Function primarily by completing assignments individually</td>
</tr>
</tbody>
</table>

**Note:** A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
### Table 13

**Teacher Innovation Configuration Map With Fidelity Lines, Component 6: Exhibiting Professionalism**

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
| Participates in at least eight, regularly scheduled, professional development meetings using study groups or other collaborative professional growth forums (see IC on p. 73) | Continually demonstrates all of the following by seeking opportunities to:  
- Be open and ready to learn and share with others  
- Practice teamwork, networking, and using the value of the group process  
- Collaborate with home-schooling parents, and other educational entities  
- Promote Christian education within the church and community | Communicates clearly and systematically by:  
- Continue communication with students and parents  
- Celebrating learner success quickly and frequently  
- Collaborating with learner and parents for the success of the learner  
- Communicating curriculum goals and standards to learners, parents and school/center board  | Only participates in staff/faculty meetings or in-service/training sessions | Does not communicate clearly and systematically by:  
- Be open and ready to learn and share with others  
- Practice teamwork, networking, and using the value of the group process  
- Collaborate with home-schooling parents, and other educational entities  
- Promote Christian education within the church and community | Occasionally seeks one or less of the following opportunities to:  
- Be open and ready to learn and share with others  
- Practice teamwork, networking, and using the value of the group process  
- Collaborate with home-schooling parents, and other educational entities  
- Promote Christian education within the church and community |
| 4     | 5           | 6            | 4a             | 4b          | 5          | 4              | 5              | 6              |
| Includes home, church, and community in the learning process with a regular and systematic plan | Has a professional portfolio which documents all of the items in 5 | Includes home, church, and community in the learning process with no regular and systematic plan | Has a documented Professional Development Plan that reveals the following:  
- Areas you have mastered  
- Areas you are working on  
- Short-term and long-term goals  
- Specific action plans with projected time frames for items 2 & 3 above  
- Portrays a philosophy of life-long improvement | Has no documented Professional Development Plan or shows only 2 or less of the following:  
- Areas you have mastered  
- Areas you are working on  
- Short-term and long-term goals  
- Specific action plans with projected time frames for items 2 & 3 above  
- Portrays a philosophy of life-long improvement | Has a professional portfolio that documents less than three of the above items or has no professional portfolio |

**Note:** A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
Page References: When page numbers are cited in this Innovation Configuration map, those pages can be found in the Adventist EDGE Handbook (Southern Union Conference of Seventh-day Adventists, Office of Education, 2006).

Southern Union Standards: The Southern Union Conference of Seventh-day Adventists Office of Education has developed educational standards for their K-12 program in connection with the Adventist EDGE initiative. While these standards are still being refined, they are online at www.adventistedge.org.

Strategies: An organized system of instruction based on learning theory or how particular scholars think regarding the particular discipline. It has research supporting strategy-relevant results in learners (Green & Henriquez-Green, 2008). Examples are Hilda Taba’s Inductive Thinking Model (Taba, 1966); Howard Gardener’s Multiple Intelligences (Gardner, 2000); Dimensions of Learning (Marzano et al., 1992); Models of Teaching (Joyce et al., 2011), Concept Attainment (Bruner, Austin, & Goodnow, 1986); Cooperative Learning (Johnson & Johnson, 1988; Kagan & Kagan, 2008); Learning for Mastery (Bloom, 1971); Teaching Concepts (Green & Henriquez-Green, 2008).

Structures: Content-free, planned processes designed to organize interaction of individuals to build a learning community. Examples are Teaching Values Structures (Gillespie, Larson, & Larson, 1992); Cooperative Learning (Kagan & Kagan, 2008); Basic Moves of Teaching (Green & Henriquez-Green, 2008); KWL developed by E. Carr and Donna Ogle (Southwest Educational Development Laboratory, 2011b).

Techniques: Effective steps designed to organize or manage the environment creating an inclusive, supportive, and caring classroom. Examples are Dimensions of
Learning (Marzano, et al., 1992); First Days (Wong & Wong, 2009); Basic Moves of Teaching (Green & Henriquez-Green, 2008).

Summary

The Teacher Innovation Configuration map in Tables 8-13 records the six components identified by the Developers and Expert Users for the Adventist EDGE teacher. The six are Component 1: Integration of Faith and Learning; Component 2: Determining the Learners’ Instructional Needs; Component 3: Delivering Instruction; Component 4: Planning Curriculum; Component 5: The Learning Environment; and Component 6: Exhibiting Professionalism. For each of the components, specific behaviors are described in three categories from Ideal, Progressing, and Unacceptable sections. A teacher or administrator can look at a particular behavior description and determine what category best describes the present use in their particular setting. This helps one determine to what the extent the Adventist EDGE teacher components have been implemented. It also provides a description of what specific behaviors need to be added to move areas that do not fall under Ideal closer to the Ideal. The checklist devised from the map (see Appendix E) is now a tool that can be used for implementing and identifying Adventist EDGE teachers. Chapter 6 provides this same type of information for the Adventist EDGE School.
CHAPTER VI

THE ADVENTIST EDGE SCHOOL INNOVATION CONFIGURATION MAP AS DESCRIBED BY THE SEVENTH-DAY ADVENTIST CONFERENCES IN THE SOUTHERN UNION

Introduction

The school Innovation Configuration map (see Tables 13-18) was developed from the components of the school Innovation Configuration for the Adventist EDGE. I also formatted this map into a checklist (see Appendix F) to provide a practical tool for teachers and administrators to use in the application of EDGE for the schools. The map and checklist have five major components with specific descriptions for each. These descriptions have four levels of implementation: Ideal, Progressing, Emerging, and Unacceptable. Each level describes a particular behavior that fits in each respective category.

The school map and checklist were originally categorized into the three categories of Ideal, Progressing, and Unacceptable. However, when the pilot test was performed in the actual school setting, the behaviors needed further breaking down to be better understood. This resulted in four categories rather than three.

Definition of Terms

Vertical Alignment: Ensuring that students have the knowledge and skills to meet each progressing grade’s expectations. (Teachers need to talk with each other to
Table 14

School Innovation Configuration Map With Fidelity Lines, Component 1: God-Centered: Integration of Faith and Community

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>School sign and building entries clearly identify the school as Seventh-day Adventist</td>
<td>Friendliness is consistently exhibited by school personnel, pastors, and school board members when working for the students. There is intentional focus of sharing personal spiritual stories with students</td>
<td>Weekly church and school spiritual activities include:</td>
<td>Weekly church and school spiritual activities include:</td>
</tr>
<tr>
<td></td>
<td>Weekly church and building entries clearly identify the school as Seventh-day Adventist</td>
<td>• Administrator/teacher(s)</td>
<td>• Administrator/teacher(s)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Pastor(s)</td>
<td>• Pastor(s)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Student-led activities</td>
<td>• Student-led activities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• School board member(s)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>There is an intentional design to:</td>
<td>The school conducts at least two weeks of prayer each year</td>
<td>Has at least one week of prayer each year</td>
<td>The fundamental beliefs of the Seventh-day Adventist Church are taught and students are led to Christ</td>
</tr>
<tr>
<td>• Teach the fundamental beliefs of the Seventh-day Adventist Church</td>
<td>Baptismal classes are available to students each semester</td>
<td>Baptismal classes are available to students once a year</td>
<td>Baptismal classes are occasionally available to students</td>
</tr>
<tr>
<td>• Lead the students to have a personal relationship with Jesus Christ</td>
<td></td>
<td></td>
<td>Weekly spiritual school activities do not include the pastor or other church members</td>
</tr>
<tr>
<td>• Evidence that students apply these Biblical principles in their everyday life</td>
<td></td>
<td></td>
<td>There is no school sign or the sign does not identify the school as Seventh-day Adventist</td>
</tr>
</tbody>
</table>

Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
### Table 15

**School Innovation Configuration Map With Fidelity Lines, Component 2: Results Oriented: Informed Decision-Making**

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Academic and baptismal data are used to develop ongoing strategic plans which form instruction and intentionally invite students to accept Jesus Christ as their personal Savior</td>
<td>Record analysis is consistently used to modify ongoing strategic plans to ensure ultimate effectiveness</td>
<td>There are implemented, ongoing recruitment plans based on current data</td>
<td>There are implemented recruitment/retention plans based on data</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>The school has a professional, attractive, and current school website which includes the following:  - User-friendly set-up  - Mission statement  - Distinctly Seventh-day Adventist/spiritual flavor  - School handbook  - Calendar of events  - School application  - Tuition/other fees  - ANGEL link  - Contact information  - Coordinated with EDGE &amp; school logos, colors, etc.  - Adventist EDGE link  - Provides a gift opportunity</td>
<td>The administration and the school board have a written master technology plan that includes all of the following:  - Maintaining current technology  - Internet access for students and teachers  - Internet safety software  - Technology is seamlessly integrated and utilized in the instruction on a daily basis  - Proper licensing of all software  - Appointed IT person</td>
<td>The administration and the school board provide and maintain current functioning library/media resources for all teachers and students</td>
<td>The administration and the school board provide functioning library/media resources for all teachers and students</td>
</tr>
</tbody>
</table>

*Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.*
Table 16

School Innovation Configuration Map With Fidelity Lines, Component 3: Environment That Nurtures: Invitational

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>All school signs, bulletin boards, and publications are invitational, professional, attractive, and often spiritual</td>
<td>Building and rooms are always physically and spiritually attractive and inviting</td>
<td>There is an implemented plan for meeting every visitor in a friendly and inviting manner</td>
<td>Building and rooms are usually physically and spiritually attractive</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>A safe, nurturing, Christ-like environment is intentionally provided and experienced by everyone at all times</td>
<td>Almost all the parents and students believe this is the school for them</td>
<td>The school culture intentionally respects diversity and continually models acceptance of each person as God’s creation</td>
<td>A safe, nurturing, Christ-like environment is intentionally provided and experienced most of the time</td>
</tr>
<tr>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>The school always invites and values suggestions and feedback in a Christ-like manner</td>
<td>Customer service is always invitational, intentional, and Christ-like</td>
<td>The school usually invites suggestions and feedback</td>
<td>Customer service is usually invitational and intentional</td>
</tr>
<tr>
<td></td>
<td>Has a published customer-centered resolution process based on Matthew 18</td>
<td>Healthy living principles are promoted and modeled by all employees and students</td>
<td>Has a published customer-centered resolution process</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
Table 17

School Innovation Configuration Map With Fidelity Lines, Component 4: Aligned With Adventist and National Standards: Instruction

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spiritual emphasis is appropriately incorporated into all instruction and activities</td>
<td>The school uses all the assessments (outlined in the Teacher of Excellence IC) to improve the overall instructional program</td>
<td>The school uses 10 to 14 types of assessments (outlined in the Teacher of Excellence IC) to improve the overall instructional program</td>
<td>The school uses assessment to improve the overall instructional program</td>
</tr>
<tr>
<td>All teachers have developed a community of learners and have effectively implemented two or more researched-based instructional strategies which honor the natural cycle of learning</td>
<td>Spiritual emphasis is appropriately incorporated into most instruction and activities</td>
<td>75% to 99% of the teachers have developed a community of learners and have effectively implemented two or more researched-based instructional strategies which honor the natural cycle of learning</td>
<td>26% to 74% of the teachers have developed a community of learners and effectively have implemented two or more researched-based instructional strategies which honor the natural cycle of learning</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4</th>
<th>5</th>
<th>4</th>
<th>5</th>
<th>4</th>
<th>5</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standards provide the foundation for differentiating instruction leading to mastery learning for most students</td>
<td>All curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready</td>
<td>Core curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready</td>
<td>Core curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready</td>
<td>There is no intentional *vertical alignment of the curricula to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standards providing the foundation for differentiating instruction leading to mastery learning for some students</td>
<td>Standards providing the foundation for differentiating instruction leading to mastery learning for some students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
### Table 18

**School Innovation Configuration Map With Fidelity Lines, Component 5: Team Effort: Collaborative and Supportive Community**

<table>
<thead>
<tr>
<th>Ideal</th>
<th>Progressing</th>
<th>Emerging</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>The school supports the local Seventh-day Adventist church through a systematic and regular participation in the Sabbath services and other programs</td>
<td>The Adventist EDGE logo is continually associated with everything: ● School sign ● Website ● Brochures/promotional material ● Handbook ● Application Form</td>
<td>The Adventist EDGE logo is sometimes displayed in the school</td>
<td>The school does not have current accreditation with the Adventist Accrediting Association (AAA) or is on probationary status</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>The school has a concise, published and posted mission statement with input from all stakeholders that can be recited by most and easily used in daily instruction</td>
<td>The meaning of the acronym &quot;GREAT&quot; is known by the school personnel, parents, students, and constituents</td>
<td>The school has a concise, written mission statement developed with input from all stakeholders</td>
<td>The school has no mission statement</td>
</tr>
<tr>
<td>7</td>
<td>8</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Communication to parents includes: ● Regular timing ● Administrator/teacher ● Electronic delivery ● Students ● Effectiveness</td>
<td>Teacher Study/Discipline Groups include 13 configuration map components found in the EDGE handbook</td>
<td>Teacher Study/Discipline Groups include 10-12 items of the component configuration map found in the EDGE handbook</td>
<td>Communication to parents is occasional or as the school perceives the need</td>
</tr>
<tr>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

**Note:** A dotted line separates “ideal” use from “acceptable” use. A solid black line separates “acceptable” from “unacceptable” use.
clarify what mastery-level achievement is expected of the students at each grade level for successful progression.)

Mastery Learning: Definitions of mastery learning vary widely. This study uses the viewpoint of Benjamin Bloom where it is important that students not be compared, but that they should be helped to achieve the goals of the curriculum they were studying (Bloom, 1971; Ellis, 2005).

Summary

This Innovation Configuration map outlines the five components identified by the Developers, Expert Users, and pilot schools for the Adventist EDGE School. The five are Component 1: God Centered—Integration of Faith and Community; Component 2: Results Oriented—Informed Decision-making; Component 3: Environment that Nurtures; Component 4: Aligned With Adventist and National Standards—Instruction; and Component 5: Team Effort—Collaborative and Supportive Community. Each of these components describes specific behaviors in four different categories from Ideal, Progressing, Emerging, and Unacceptable. There are four categories for this Innovation Configuration map because behaviors needed further clarification as identified by the pilot testing. From this configuration map, a school or conference can look at a particular behavior description and determine what category best describes the present use in their particular setting (or the checklist format may be used [See Appendix F]). This tool helps determine the extent of implementation of the Adventist EDGE school components. It provides an explanation of specific behaviors needed in order to fulfill the Ideal category. This configuration map is a tool to use for implementing and identifying Adventist
EDGE schools. Now we have two Innovation Configuration maps (or their respective checklists) for the Adventist EDGE initiative, one for the teacher and one for the school.

Chapter 7 provides a summary of this entire study. Although chapter 7 is not an exhaustive account, it helps the reader to understand the need for the study, which produced two practical tools to use for meeting that need. It discusses the guiding questions for the study, the limitations of the study, and offers supporting literature relating to the study. The chapter closes with discussions, conclusions, and implications resulting from this study.
CHAPTER VII

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Introduction

In the late 1990s the Southern Union Conference of Seventh-day Adventists began to take a serious look at what Adventist education should be like for the 21st century. The Education Office of the Southern Union Conference of Seventh-day Adventists is part of a private, educational system belonging to the worldwide Seventh-day Adventist Church. The General Conference is the world headquarters and is located in Silver Spring, Maryland. The world region is divided into 13 geographical divisions. One of these geographical areas is the North American Division. Each division is divided into unions, with nine unions represented in the North American Division. The Southern Union is one of the nine. Each union is divided into local conferences. There are eight local conferences in the Southern Union (http://www.adventist.org/world_headquarters/).

The North American Division’s (NAD) *Focus on Adventist Curriculum for the 21st Century* (FACT21) (North American Division of Seventh-day Adventists, Office of Education, 1997) document outlined the NAD’s philosophy, goals, essential core elements, and preferred practices, which have been revised, expanded, and integrated into a model for school improvement now called *Journey to Excellence* (North American Division of Seventh-day Adventists, Office of Education, 1997). The Southern Union
studied these documents and developed a plan for implementing these ideas called the Adventist EDGE.

By May of 2004, every conference in the Southern Union introduced the Adventist EDGE program to stakeholders at area meetings. However, because the Adventist EDGE is a complex initiative, we needed additional time and clarity for successful implementation. What should the initiative actually look like when implemented in the classroom? What would be the acceptable and unacceptable variations within the implementation? How could we clearly describe an Adventist EDGE teacher or school to stakeholders? Two factors contributed to internal discrepancies: one, the Developers (administrators who developed the Adventist EDGE plan) had their own individual ideas of what Adventist EDGE should look like when applied in the classroom; and two, key players in the administration role had come and gone throughout the development process, jeopardizing the ability of the organization to sustain the EDGE vision. New administrators who had not experienced the initial journey of discovery and development of the Adventist EDGE concept had limited ability to understand the initiative, thus slowing the implementation process and threatening sustainability.

At one point, the Southern Union decided they needed to have a recognized Adventist EDGE school as a model of what the initiative looked like. The Southern Union scheduled a confirmation visit for a school, which several considered ready to be officially recognized. The visiting committee consisted of the Southern Union education director and associates, the marketing consultant, and several conference superintendents and associates. As the day progressed and the committee observed the school, it became
more and more evident that not everyone was interpreting the items listed in the *New EDGE Handbook* the same way. The committee did not agree and decided to postpone the official recognition. Hurt feelings and disagreements resulted because of the varying perceptions and lack of unity on the details of the new initiative. This experience had the potential to severely damage the EDGE implementation process and possibly give it a bad name among other schools and constituents. The validity of the program was in question, especially by those who had not been a part of the initial development, caused by the lack of clarity resulting in a lack of unity and understanding. Would the EDGE become yet another perceived “band-wagon” in education? How could we clarify the implementation process? How could we avoid the general perception that the EDGE concept was ineffective because it failed in its implementation?

In reality, many good programs have acquired a bad reputation. This is because the critical elements and range of behavioral descriptions for those elements were not clearly defined for the new program (Hord, 1986). While the Southern Union voted to approve this study several months before, it was after this school experience that the reason for the study became clear. The differences in the perceptions of the Adventist EDGE initiative needed clearly defining through research if the initiative was to survive. The results of such a study would aide administrators in effective implementation of the Adventist EDGE initiative. The need and purpose for the study was clear.

**Purpose of the Study**

With clarity of purpose, I began to collect the data to develop an operational definition or Innovation Configuration of the Adventist EDGE Teacher and the Adventist EDGE School. I used the following three questions to guide my study:
1. What elements must be present to be an Adventist EDGE classroom/school?

2. What are the core components of the Adventist EDGE teacher/school?

2. Within each component, what is the continuum of behaviors from ideal to unacceptable?

**Method**

I identified the Innovation Configuration, a component of the Concerns-Based Adoption Model (CBAM) as an effective researched-based method for developing an answer to these three questions (Hord, Stiegelbauer, et al., 2006). While the Innovation Configuration is a good tool for clarity and implementation of an initiative, the process outlined through CBAM is equally important. When a school system decides to implement a new initiative, a strange phenomenon occurs (Hord, 1986). The developers work together to construct the new program. They share it with those who are to implement it; somehow, thinking everything is clear they are blind to the fact that the initiative needs further defining to be effective. Therefore, when the initiative is in actual practice, different users adapt the innovation, which result in changes that range from acceptable to unacceptable variations (Hord, 1986). These differences of the innovation are the varying configurations to identify when developing an Innovation Configuration. CBAM’s Innovation Configuration Tool provides a research-based framework for identifying these variations.

The Innovation Configuration structure provides a vehicle for individual input and group collaboration where participants listen to each other’s opinions and ideas to reach a consensus on the components of the innovation. The process brings unity of heart to the group and a passion and personal buy-in of the initiative (Heck et al., 2006).
Twenty Developers (administrators who developed the program) and 22 Users (teachers who were using the program in the classroom) participated in the study. The Users varied from those considered Expert Users of the Adventist EDGE to non-users. The process has six steps. For Step 1, I identified the initial components as described by the Developers through a survey. The questions were broad and open-ended in an effort to find general ideas that might surface. In Step 2, I organized and categorized the collected data for presentation to the Developers. In Step 3, I presented the data to the Developers for further feedback, discussion, and clarification. Then, I presented the data to the Users for more clarification and additional components. Interviews and discussions regarding the Adventist EDGE Teacher Components and the Adventist EDGE School Components took substantial time and effort for collaborating back and forth among those participating in the study. This collaboration continued as many times as was needed until all the Developers and the Users were satisfied with the results. In Step 4, I developed an Innovation Configuration map for both the EDGE Teacher and the EDGE School. For Step 5, I conducted a pilot test for both configuration maps, searching for errors and clarity of understanding with various levels of users. In Step 6, from the pilot test, I adjusted some formatting and minor grammatical errors and finalized, refined, and prepared each configuration map for distribution in the Southern Union.

Innovation Configuration studies are qualitative in nature and focus on discovery, insight, and understanding from the perspectives of those being studied (Heck et al., 1981). Qualitative studies of this nature offer great promise of making substantive contributions to the knowledge base and practice of education (Merriam, 1998). In this study, I observed other people’s constructions of how they understood the Adventist
EDGE through observations and interviews. I worked to establish relevancy through coherency, consensus, and by providing instrument utility that can be used to aid the effectiveness of implementation (Eisner, 1998).

By coherency, I am referring to the feeling that the results “ring true”; it coheres by sticking or holding together a mass that is not easily separated while making sense (Eisner, 1998). I have endeavored to provide enough detail to show that the Innovation Configurations make sense and represent a “good fit” at the time of the study. One must remember, however, that the EDGE initiative is an ongoing project which will continue to evolve and change as it progresses into the future (Hord et al., 2004; Hord, Rutherford, et al., 2006). Through my description, I have made a sincere effort to provide evidence that procedures have been followed faithfully (Merriam, 1998).

While consensus does not imply “truth,” it is a “result of evidence deemed relevant to the description, interpretation, and evaluation of some state of affairs” (Eisner, 1998, p. 57). Although the level of consensus may vary, depending on the circumstances (Eisner, 1998), in this study the level of consensus included all those participating in the study because of the importance of unity for effective implementation and use of the Adventist EDGE initiative. Thus, the process included substantial time and effort to collaborate back and forth between those participating in the study. This back-and-forth collaboration continued as many times as was needed until all the Developers and the Users were satisfied with the results. While this reflects the opinions of the participants, their consensus creates a certain validity of their judgments (Eisner, 1998).
Results

The process of the above six steps resulted in three outcomes: the Adventist EDGE Teacher Innovation Configuration Checklist, the Adventist EDGE School Innovation Configuration Checklist, and the unifying of opinions and ideas throughout the Southern Union into an agreed-upon understanding of what specific behaviors define an ideal to unacceptable implementation of the Adventist EDGE teacher and school.

The Adventist EDGE Teacher Innovation Configuration Checklist consists of six major components:

Component 1: Integration of Faith and Learning
Component 2: Determining the Learners’ Instructional Needs
Component 3: Delivering Instruction
Component 4: Planning Curriculum
Component 5: The Learning Environment
Component 6: Exhibiting professionalism.

Each component is broken down into categories with specific descriptions for each category. These descriptions identify three levels of implementation: Ideal, Progressing, and Unacceptable. Each level describes a particular behavior that fits in each respective category. It begins with a definition of terms to provide clarity for the configuration map. This Innovation Configuration map presents a practical tool for teachers and administrators to use in the application of the Adventist EDGE Teacher. See chapter 5 for the complete Adventist EDGE Teacher Innovation Configuration map.

The Adventist EDGE School Innovation Configuration map has five major components:
Component 1: God-Centered: Integration of Faith and Learning

Component 2: Results Oriented: Informed Decision-making

Component 3: Environment That Nurtures: Invitational

Component 4: Aligned With Adventist and National Standards: Instruction

Component 5: Team Effort: Collaborative and Supportive Community.

Each of these components is broken down into categories with specific descriptions. These descriptions provide four levels of implementation: Ideal, Progressing, Emerging, and Unacceptable. Each level describes a particular behavior that fits in each respective category. This Innovation Configuration map provides a practical tool for teachers and administrators to use in the application of the Adventist EDGE School. See chapter 6 for the complete Adventist EDGE School Innovation Configuration map.

**Discussion**

After starting the study, it soon became evident that the initiative was far too complex to be in a single IC. The Developers and I were not aware of this at first. However, as the dialog began, it became necessary to divide the vast amount of information into at least two categories: the teacher components and the school components. The discussions also revealed different perceptions of what certain ideas meant which led the Developers to understand why there was a critical need to clarify these ideas with specific descriptions of the actual behaviors.

Using the Innovation Configuration component of CBAM for this study provided guidance for managing the magnitude of information and a research-base for defining the Adventist EDGE. “CBAM tools have been commonly used in federally sponsored research projects, dissertation research, evaluations, and change programs” (Hord,
Stiegelbauer, et al., 2006, p. 2) since the mid-1970s and have been used in a wide-range of school, organizational, and university settings. CBAM supplied a platform for identifying and organizing the many variances in the EDGE initiative through the development of the two Innovation Configurations (Hord, Stiegelbauer, et al., 2006).

The CBAM method addresses a variety of opinions that come when a new initiative is developed. CBAM emphasizes that change is a process, not an event, and that the change is accomplished by individuals, not organizations (Hord et al., 2004). By providing a setting where every individual from the sample could express their views and deliberate back and forth with other views, an open discussion took place resulting in a unified vision for the Adventist EDGE.

In the beginning, the Adventist EDGE initiative involved three major components: (a) curriculum, instruction, and assessment; (b) the 4MAT model; and (c) the study group model. While both the teacher and school IC fully supported these three major components, other major components emerged, or rather became clear during the study. The God-centered component became especially evident in all aspects of the teaching and school operation.

The literature review included discussion on the 4MAT Model for instruction. 4MAT (McCarthy, 2000) emphasizes student-centered learning through the natural cycle of learning. It allows students to shine when instruction is in their learning style and stretch when working in activities that are not their strongest learning style. The 4MAT Model became the framework for delivering the curriculum through appropriate instruction and assessment for all learning styles. 4MAT added a structured intentionality for using structures and strategies at strategic places in the instructional activities for the
students (Joyce & Weil, 1996; McCarthy, 2002). In the Innovation Configuration study of the Adventist EDGE initiative, the Developers and Expert Users identified 4MAT as one of the elements in Component 3: Delivering Instruction for the Adventist EDGE Teacher of Excellence IC and in Component 4: Aligned with Adventist and National Standards—Instruction in the Adventist EDGE School of Excellence IC.

Study Groups are an important support piece in the change process (Crowther, 1998; Henriquez-Roark, 1995; Mohr, 1998). In places where Study Groups (Henriquez-Roark, 1995) or Whole-Faculty Study Groups (Lick & Murphy, 2007) have been successfully implemented, these Study Groups became a supporting team to the participating teachers as they implemented new teaching strategies and methods into the instructional process. In this study, the Developers and Expert Users found the Study Group concept to be an important element for the Adventist EDGE initiative. The Adventist EDGE School of Excellence IC defines the Study Group concept under Component 5: Team Effort—Collaborative and Supportive Community; and the Teacher of Excellence IC defines the Study Group concept under Component 6: Exhibiting Professionalism.

This Innovation Configuration study involved a very large concept, a complete school reform plan. In this respect, the study seems to differ from the typical Innovation Configuration study, which usually focuses on the implementation of a specific school program (Hord et al., 2004) rather than a comprehensive change-initiative involving conceptual change over a large geographical location. Because of the magnitude of the initiative and the quantity of the data, this study seemed much broader than most Innovation Configuration studies. It involved the participation of union-wide leadership
representing several conferences including school districts. Because of this factor, much collaboration took place between the Developers and the Users. It is interesting to note that the differences in perceptions between the Users were not as wide or diverse as the ideas of the Developers. There was also much more discussion among the Developers than among the Users before a consensus could be reached. Perhaps this was because the Developers represented a broader area of experience and education. They were involved in the initiative from the beginning and helped to formulate the very foundation of EDGE. The Users were not as involved and responded mostly to how they saw the initiative applied in the classroom.

Because two ICs have resulted from this study, questions arise regarding the interdependent nature of the two separate Innovation Configuration maps. Can we have an EDGE school without EDGE teachers? Can we have one or more EDGE teachers in a non-EDGE school? The CBAM model states clearly that change is accomplished by individuals, is a highly personal experience, and involves developmental growth with the focus being on the individuals, innovations, and context (Hord, Rutherford, et al., 2006). Does this mean all teachers must first be EDGE Teachers of Excellence before a given school can become an EDGE School? Or does it mean something else and, if so, what? Perhaps these questions are best answered through further research in a separate study.

**Conclusion**

This study reinforced the concept that change is a process, not an event (Hall et al., 1998), a process occurring over time, usually years. It does not happen just because administration hands down a decision or verdict. This study also provided a guideline to unify the Southern Union in their understanding and communication of the Adventist
EDGE initiative. It provided clarifying definitions for what the Adventist EDGE initiative looks like in the school and in the classrooms, depicting the various stages of implementation. Every level of administration along with teachers from each grade level, Kindergarten through 12, participated in the development of the Innovation Configurations. This fostered ownership among key players and increased understanding throughout the system, helping us move toward a more effective realization of the Adventist EDGE initiative.

Using the Innovation Configurations, the Southern Union administration can now measure Adventist EDGE to determine the implementation level. Before, it was impossible to verify if the program had merit or at what level it had been implemented (Hall et al., 1998, p. 12). Establishing variations of acceptable and unacceptable levels of use were critical for quality of practice and implementation of the Adventist EDGE. These ICs provide a structure for assessing the level of execution and determining a range of acceptable and unacceptable categories, which each individual or school can use for discovering where they fit on the continuum for implementation of the Adventist EDGE. The Southern Union has an operational model for the actual realization of the innovation which enables educators to create the learning or physical changes in the brain necessary for successful implementation at an individual level (Joyce & Weil, 1996; Kotter, 1996; Quinn, 1996).

This study provides two instruments for use in identifying the various levels of implementation in the classroom and school settings. These instruments, the Adventist EDGE Teacher Innovation Configuration Checklist (see Appendix E) and the Adventist EDGE School Innovation Configuration Checklist (See Appendix F), can serve as guides
to deepen and broaden the understanding of educational administrators in the Southern Union about the Adventist EDGE initiative (Eisner, 1998). These checklists serve to provide a vivid portrait of what the Adventist EDGE is like in its ideal setting and its unacceptable setting with ranges on the continuum from poor to ideal. These checklists also can introduce the program; communicate how the initiative might be phased in for classroom use; and monitor program progress (Hord, Rutherford, et al., 2006).

As the Developers worked on defining the EDGE components, a recurring concept kept arising: Innovation Configurations are living, growing documents which would continue to evolve as the EDGE program further developed and established its roots. While these two Innovation Configurations are designed to be specific, they are also very broad, especially the Teacher IC which covers K-12. The intent is to be specific enough to provide for commonality among Adventist EDGE Teachers and Schools while still allowing for the freedom of individuality, local needs, and local resources. These Innovation Configurations will need adjusting as implementation occurs at deeper and more comprehensive levels.

While all 42 participants agreed at one point in time with both ICs, because of the magnitude of the initiative, and because the Adventist EDGE is a continuum on the Journey to Excellence, it will not be long until new adjustments and ideas may be added or stricken from the ICs established in my study. However, my study has provided the Southern Union with clarity and focus for the Adventist EDGE, increasing the sustainability of the Adventist EDGE initiative. I am satisfied that my work and effort have not been in vain. My purpose was to provide a picture of what the Adventist EDGE
looks like today and I realize as time progresses, and if things are the way they are supposed to be, things will change as we move towards something better and greater.

**Implications for Practice**

The EDGE Teacher Innovation Configuration Map

In this study, I identified the components of the Adventist EDGE Teacher. (For the checklist version, see Appendix E.) The EDGE Teacher Innovation Configuration Map provides a baseline with many implications for further studies. It also provides guidelines for coaching and development of Adventist EDGE Teachers. What does the EDGE Teacher IC tell us, how should we use the IC, and why is its use important for the successful implementation of the EDGE initiative?

In the Teacher Innovation Configuration Map, the teaching components are clarified for an Adventist EDGE Teacher. The components are described with behaviors labeled Ideal, Acceptable, and Unacceptable so one can identify where one fits on the continuum of behaviors. While it does not provide the training, feedback, and coaching so critical in the development of teaching skills, the IC does provide guidance by identifying areas that could be improved (Hord et al., 2004). One of its best uses may be in helping individual teachers determine where they are personally in comparison to the Adventist EDGE Teacher concept.

The Teacher IC provides a tool for more effective communication regarding the Adventist EDGE Teacher. It establishes a base for designing and developing an individual professional growth plan as the teacher moves towards becoming an Adventist EDGE Teacher. Individual teachers could use the Teacher IC to track their professional development of skills, and determine areas of focus for individual growth. It allows
teachers to identify needs in the training, coaching, and feedback model for professional development.

Clarification of information provides better communication regarding the Adventist EDGE Teacher concept—among peers, between office and teaching staff, between parents and teachers, or even constituents. Administration could use the Teacher IC to conduct a survey with teachers to identify specific target content for training and staff development that would benefit the largest number of teachers participating. The Teacher IC can serve as a guideline for making decisions to request needed teacher trainings or programs throughout the conference or union. Though this is not an exhaustive list, these are some possibilities that could help strengthen the Adventist EDGE initiative.

Using the Teacher IC effectively is important for the successful implementation of the Adventist EDGE. Without its guidance, other programs, which could be good in themselves, could end up overtaking the implementation of programs considered a part of the EDGE implementation. The Teacher IC provides a compass for maintaining the focus on the EDGE components. This helps eliminate sidetracks that so often lure and tempt administrators to wander from the original vision.

It is important to note that studies of innovation implementation have repeatedly shown that teachers do not always comply with even the most structured innovations and so the development of this IC will not eliminate variations of the initiative (Heck et al., 1981). It is also important to understand that teaching cannot be reduced to a configuration map of things to be done, even though the configuration map can provide a good base. Although the Teacher IC provides a good technical base, Eisner (1998) writes
that the work of education should be viewed as an expression of artistry, looking beyond the technical to the more creative and appropriate responses to situations that educators and learners encounter. Eisner goes on to say that education is both a connoisseurship and criticism. By connoisseurship he means the art of appreciation, the ability to see, not merely look; something that one needs to work at—but it is not a technical exercise. Teaching is also an artistry that brings together the technical elements and the ability to see and understand into a whole. Criticism, on the other hand, is disclosure; the ability to help one see or the process of enabling others to see the qualities of something, and to be able to describe (Eisner, 1998; Smith, 2005). In short, connoisseurship means to know what is good and criticism is the ability to describe it to someone else. Using only the Teacher Innovation Configuration map to evaluate teachers or develop a rubric for assessment of their teaching would fall very short in identifying the artistry that comes from being an educational connoisseur and critic. Thus, what is really desired for an Adventist EDGE Teacher may not be identified with the IC alone. The IC could be one tool used to help in the evaluation process, but the use of other methods in order to establish a more accurate picture of an Adventist EDGE Teacher is necessary.

The EDGE School Innovation Configuration Map

This study also identified the components of the Adventist EDGE School. (For the checklist version, See Appendix G.) The EDGE School Innovation Configuration Map provides for clarity of components listed as present Adventist EDGE Schools. Each of these components have levels of implementation categorized as Ideal, Progressing, Emerging, and Unacceptable, which help identify the specific behaviors expected.
The School IC is a tool for more effective communication regarding Adventist EDGE Schools. Possibly one of its best uses is as a scoring rubric to aid in identifying the implementation levels of the EDGE School components to determine which schools can become recognized Adventist EDGE Schools of Excellence. Other ways to use the School IC may be to:

1. Enable educators and administrators to assess their own progress in becoming an EDGE school
2. Design a plan of action for improvement and growth at a specific school or conference
3. Communicate clearly to parents and school board members the components of an EDGE school
4. Develop a scoring rubric for evaluating and recognizing an EDGE School of Excellence
5. Provide a guideline from which schools and their constituents can work to become EDGE Schools. This would be used as an assessment tool for formative and summative program evaluation.

Effective use of the School IC is important for the successful implementation of the Adventist EDGE because its guidance is critical for facilitating communication and consistency throughout the union. It minimizes misunderstandings of ideas and promotes unity for implementing the vision of Adventist EDGE schools, proving a foundation for developing specific school improvement plans across the union. The School IC provides an excellent baseline for further studies, such as:
1. Developing the Innovation Configurations for the conference and union levels to help clarify the role each plays in the new paradigm of the Adventist EDGE

2. Conducting a comparison study between a typical “good” Seventh-day Adventist School and an Adventist EDGE School of Excellence

3. Conducting longitudinal studies of student achievement in Adventist EDGE Schools of Excellence

4. Conducting longitudinal studies of student achievement in classrooms of Adventist EDGE Teachers of Excellence

5. Describing the effect, if any, of Adventist EDGE on teacher burnout

6. Describing the effect, if any, of Adventist EDGE on the customers, the local church, and the local community

7. Describing the effects, if any, of Adventist EDGE Schools of Excellence on the local conference

8. Describing how the Adventist EDGE affects teachers in different school types, such as small and one-room schools

9. Describing how the Adventist EDGE affects students at different grade levels and in different school types

10. Determining the effects, if any, of an Adventist EDGE Teacher of Excellence on his/her fellow teachers

11. Determining if Adventist EDGE is meeting the needs of Seventh-day Adventist education for the 21st century as outlined in the North American Division’s Journey to Excellence document
12. Determining if the implementation of Adventist EDGE Schools or Teachers of Excellence has any impact on student enrollment

13. Determining if the Integration of Faith and Learning and Community (Component One on the teacher and school IC) has any impact on students accepting Jesus as their personal Savior and developing a life-long relationship with Him

14. Determining if there is a unifying effect the Adventist EDGE has on the school, the local church, the local conference, or the union

15. Determining if Adventist EDGE has any effect on a school faculty’s ability to function as a team and solve their own problems without mediation by the conference superintendent

16. Determining the Levels Of Use using the Concerned-Based Adoption Model (CBAM)

17. Determining the effect the Innovation Configuration has on the sustainability of the Adventist EDGE.

While this study took several years to complete, it was a very interesting and rewarding process. The Southern Union used the Adventist EDGE School IC components to develop a scoring rubric. This scoring rubric has been used to identify and publically recognize nine schools in the Southern Union as official Adventist EDGE Schools of Excellence. Several more schools are scheduled for a recognition visit. It has been a delightful experience and privilege to work with the Southern Union as they responded to the *Journey to Excellence* challenge and developed the Adventist EDGE initiative.
APPENDIX A

MANAGING COMPLEX CHANGE MATRIX
Managing Complex Change
(Ambrose 1987)
APPENDIX B

SOUTHERN UNION OFFICIAL EDGE LAUNCH DATE
SOUTHERN UNION CONFERENCE
BOARD OF EDUCATION
MEETING MINUTES
2003

VOTED: That Camp Meeting 2004 be the official launch date for the external marketing campaign of the Adventist EDGE.
APPENDIX C

ADVENTIST EDGE SCHOOL VALICATION VISIT
TO: A.W. Spalding Seventh-day Adventist School
ADDRESS: 4820 University Drive
Collegedale, TN 37316
WEBSITE: AWSpalding.net
PHONE: (423) 396.2122
FAX: (423) 396.2218
DATE: May 2, 2007
SUBJECT: Verification Review of “Track A” Adventist EDGE School of Excellence Criteria

The Adventist EDGE Validation Committee has examined the Adventist EDGE “School of Excellence” criteria, components, and assessments as outlined in the recently adopted 2007 Adventist EDGE Handbook. In reference to the application and evidence portfolio prepared by A.W. Spalding SDA School and found this evidence to be a comprehensive document in scope and sequence. The committee observed that A. W. Spalding utilized an emerging document to develop the portfolio prior to the publication of the 2007 Adventist EDGE Handbook. Based on the visit to A.W. Spalding SDA School, areas of the Handbook will be identified for revision that will clarify and strengthen the Adventist EDGE School of Excellence award process.

The Adventist EDGE Validation Committee, therefore, confers the Adventist EDGE School of Excellence Award to A. W. Spalding Elementary School for a period of two years. This Award may be extended for the full, five-year term when reapplied for by utilizing the revised Adventist EDGE Handbook and application guidelines. We congratulate the A.W. Spalding team and its stakeholders for your accomplishment. We applaud you as you continue on your Journey To Excellence.
ADVENTIST EDGE
“SCHOOL OF EXCELLENCE”
VALIDATION COMMITTEE RESULTS
AND TEAM MEMBERSHIP

The Adventist EDGE Validation Committee therefore confers the Adventist EDGE “School of Excellence” Award to A. W. Spalding Elementary School for a period of two years. This Award may be extended when reapplied for utilizing the revised Adventist EDGE Handbook and application guidelines.

Conrad L. Gill, Director of Education - Southern Union Conference of SDA

V. Diane Ruff, Associate Director of Education - Southern Union Conference of SDA

Cynthia Gettys, Vice-President of Education - Georgia Cumberland Conference of SDA

Gilbert Cooper, Superintendent of Schools - South Central Conference of SDA

Robert Crux, Superintendent of Schools - Carolina Conference SDA

Don Tucker, President DRS Marketing - Adventist EDGE Consultant

Validation Committee Visit
May 2, 2007
APPENDIX D

SOUTHERN UNION STUDY GROUP VOTE
VOTED: to proceed with plan that only the elementary associate superintendents be involved in the Study Groups as this time.

STUDY GROUPS
98:05

VOTED: to develop a master plan for staff development in the Southern Union.

STAFF DEVELOPMENT PLAN
98:38
APPENDIX E

ADVENTIST EDGE TEACHER INNOVATION CONFIGURATION CHECKLIST
Teacher Components

COMPONENT 1:
INTEGRATION OF FAITH AND LEARNING

CONTEXTUAL SETTING

A. Ideal
1. _____ Intentionally facilitates a positive emotional climate for learning at all times.
2. _____ Strives to make a positive difference with every learner.
3. _____ Always shows kind and thoughtful behavior to each and every learner, communicating a personal interest in his/her learning style and needs.
4. _____ Faith is integrated into all subject areas.

B. Progressing
1. _____ Intentionally facilitates a positive emotional climate for learning most of the time.
2. _____ Strives to make a positive difference with most learners.
3. _____ Always shows kind and thoughtful behavior to each and every learner.
4.a _____ Faith is integrated into most subject into areas.
4.b _____ Faith is integrated into some subject areas.

C. Unacceptable
1. _____ There is no intentional facilitating of a positive emotional climate for learning.
2. _____ Relates to the learners as a whole class.
3. _____ Deals with individual learners mostly when they are in trouble.
4. _____ Faith is only talked about in connection with Bible class.

ILLUSTRATIVE SETTING

A. Ideal
1. _____ Teachers share stories of how others were called by God at every opportunity.
2. _____ Teachers talk passionately about their work, repeatedly sharing about how God called them to their work.
B. Progressing

1. ___ Teachers share stories of how others were called by God as it fits in the Bible class curriculum.

2. ___ Teachers share about how God called them to their work.

C. Unacceptable

1. ___ Teachers follow only the Bible curriculum.

2. ___ Teachers do not talk positively about their work or share about how God called them.

CONCEPTUAL SETTING

A. Ideal

1. ___ Daily Bible reading, singing, and prayer includes intentional spiritual activities that are interactive, attractive, and relevant to the learners.

B. Progressing

1. ___ Daily Bible reading, singing, and prayer includes no intentional spiritual relevancy to learners.

C. Unacceptable

1. ___ Daily worship is only read from a story or worship book and spiritual activities are not intentionally attractive or relevant to the learners.

EXPERIENCIAL SETTING

A. Ideal

1. ___ A personal interest is taken in each learner with opportunities to discuss spiritual things or pray with each learner sought at least once a week.

2. ___ There is a systematic plan for the school/center to extend spirituality to the home, church, and community.

3. ___ A mentorship plan is designed so each learner has at least one of three significant adults who consistently connect to him/her.*
B.  Progressing

1. ____  A personal interest is taken in each learner with opportunities to discuss spiritual things or pray with each learner at various times.

2. ____  There is a systematic plan for the school/center to extend spirituality to one of these: the home, church, or community.

3. ____  A mentorship plan is designed so each learner has at least one of two significant adults who consistently connect to him/her.*

C.  Unacceptable

1. ____  Interest in learning and praying is given as only to the group as whole, without any individual attention.

2. ____  There is no systematic plan for the school/center to extend spirituality to the home, church, or community.

3. ____  There is no mentorship plan in place for each learner to have significant adults who consistently connect to him/her.
COMPONENT 2:
DETERMINING THE LEARNERS’ INSTRUCTIONAL NEEDS

A. Ideal

1. ___ Uses standardized tests appropriately to help determine the strengths and weakness of each learner.

2. ___ Uses concrete data to group learners for:
   • Intensive reading instruction
   • Intentional teaching and motivation
   • Advanced instruction

3. ___ Uses all of the following items:
   • Informal teacher assessments:
     o Observation
     o Anecdotal records
   • Formal teacher-generated assessments:
     o Essay/short answer
     o Matching
     o True/False
     o Multiple Choice
     o Traditional written assessments
   • Learner-generated assessments:
     o Self-assessments
     o Journals
     o Portfolios
     o Learner-led conferences
     o Demonstrations and performances
   • Collaboratively-generated assessments:
     o Interviews/conversations

B. Progressing

1. ___ Uses standardized tests appropriately to help determine strengths and weakness of each class.

2. ___ Groups learners for:
   • Intensive reading instruction
   • Intentional teaching and motivation
   • Advanced instruction

3. ___ Uses 10 to 14 of the following items:
   • Informal teacher assessments:
     o Observation
     o Anecdotal records
   • Formal teacher-generated assessments:
     o Essay/short answer
     o Matching
     o True/False
     o Multiple Choice
     o Traditional written assessments
   • Learner-generated assessments:
     o Self-assessments
     o Journals
     o Portfolios
     o Learner-led conferences
   • Demonstrations and performances
   • Collaboratively-generated assessments:
     o Interviews/conversations
     o Rubrics
     o Peer assessments
C. Unacceptable

1. ____ Does not use standardized tests to appropriately determine the strengths and weakness of the class or individual learner.

2. ____ Learners are not grouped for differentiated instruction.

3. ____ Uses less than 10 of the following items:
   - Informal teacher assessments:
     - Observation
     - Anecdotal records
   - Formal teacher-generated assessments:
     - Essay/short answer
     - Matching
     - True/False
     - Multiple Choice
     - Traditional written assessments
   - Learner-generated assessments:
     - Self-assessments
     - Journals
     - Portfolios
     - Learner-led conferences
     - Demonstrations and performances
   - Collaboratively-generated assessments:
     - Interviews/conversations
     - Rubrics
     - Peer assessments
COMPONENT 3:
DELIVERING INSTRUCTION

A. Ideal

1. __ Cooperaive Learning is the essence of the classroom setting. (See IC pages. 66 & 67)
2. __ Current research on the brain and learning is intentionally incorporated into all daily instruction.
3. __ The 4MAT framework is used 80% of the time for providing intentional, conceptual, and differentiated instruction; integrating various subject areas in an authentic, relevant, and meaningful way. (See pp. 55-64.)
4. __ Curriculum, instruction, and assessments are developmentally and academically appropriate for every learner.
5. __ Mastery learning rather than grade placement is the focus in all subject areas.
6. __ Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of each learner every day.

B. Progressing

1. __ Cooperative Learning is used daily or weekly, but is not the essence of the classroom setting. (See IC pp. 66 & 67.)
2. __ Current research on the brain and learning is intentionally incorporated into some instruction.
3. __ The 4MAT framework is used less than 80% of the time for providing intentional, conceptual, and differentiated instruction. (See pp. 55-64.)
4. __ Curriculum, instruction, and assessments are developmentally and academically appropriate for most learners.
5. __ Mastery learning rather than grade placement is the focus in basic skills subjects.
6. __ Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of almost all learners every day.

C. Unacceptable

1. __ Cooperative Learning is used less than weekly. (See IC on pp. 66 & 67.)
2. __ Current research on the brain and learning is not understood or intentionally incorporated into instruction.
3. __ The 4MAT framework is not used to provide intentional, conceptual, and differentiated instruction. (See pp. 55-64.)
4. __ Curriculum, instruction, and assessments focus on grade levels instead of using developmentally and academically appropriate instruction for learners.
5. __ Grade placement rather than mastery learning is the focus.
6. __ Well-prepared lesson plans meet the diverse needs of the multiple intelligences and learning styles of almost all learners occasionally.
COMPONENT 4:  
PLANNING CURRICULUM

A.  Ideal

1. ___ Develops all lessons from standards and benchmarks of what the learners should know and be able to do. (See Southern Union Standards.)
2. ___ Integrates three or more subject areas in an authentic, relevant, and meaningful way every day.
3. ___ Integrates all the following technology into the curriculum with progressing learner-appropriateness:
   a) Programs for instruction, skill remediation, keyboarding and computer literacy.
   b) Acceptable use of Internet resources for research and information.
   c) Learners have regular access to technology tools and online resources.
   d) Learners progressively demonstrate understanding of how to discriminate for positive web use and information.
   e) Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc.
4. Language Arts and Comprehensive Literacy integration:

   Elementary-
   Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening and discussing, grammar in speaking and writing into three or more subject areas in the following ways:

   __ Comprehensively – Includes all components of language arts skill, not just reading.
   __ Aligned – All content; spelling, vocabulary, handwriting, are integrated cohesively into the lessons.
   __ Systematically – A routine method repeated over and over again.
   __ Explicitly – Direct and methodical introduction is provided for new material.
   ___ reading and writing
   ___ listening to and discussion
   ___ grammar in speaking and writing

   Secondary-
   When appropriate, integrates the following components 100% of the time into the subject area(s) taught:

   ___ vocabulary
   ___ fluency
   ___ comprehension strategies

5. ___ Integrates all math lessons conceptually so learners see relevance and connections to other subject areas in the following:
   • Problem solving
   • Reasoning and proof
   • Communication
   • Representations
B. Progressing

1. ___ Develops some lessons from standards and benchmarks of what the learners should know and be able to do. (See Southern Union Standards.)

2. ___ Integrates two subject areas in an authentic, relevant, and meaningful way every day.

3. ___ Integrates most of the following technology into the curriculum with progressing learner-appropriateness:
   a) Programs for instruction, skill remediation, keyboarding and computer literacy.
   b) Acceptable use of Internet resources for research and information.
   c) Learners have regular access to technology tools and online resources.
   d) Learners progressively demonstrate understanding of how to discriminate for positive web use and information.
   e) Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc.

4. Language Arts and Comprehensive literacy integration:
   **Elementary-**
   ___ Integrates phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening and discussing, grammar in speaking and writing into three or more subject areas.
   **Secondary-**
   ___ When appropriate, integrates the following components most of the time into the subject area(s) taught: vocabulary, fluency, comprehension strategies, reading and writing, listening to and discussion, grammar in speaking and writing.

5. ___ Integrates at least 75% of math lessons conceptually so learners see relevance and connections in the following:
   • Problem solving
   • Reasoning and proof
   • Communication
   • Representations

C. Unacceptable

1. ___ Develops lessons from textbooks.

2. ___ Does not integrate two or more subject areas in an authentic, relevant, and meaningful way.

3. ___ Does not integrate the following technology into the curriculum with progressing learner-appropriateness:
   a) Programs for instruction, skill remediation, keyboarding and computer literacy.
   b) Acceptable use of Internet resources for research and information.
   c) Learners have regular access to technology tools and online resources.
   d) There is a progressive understanding of how to discriminate for positive web use and information.
   e) Programs for academic use of word processing, and other programs such as PowerPoint, Excel, etc.

4. Language Arts and Comprehensive Literacy integration:
   **Elementary-**
   ___ Does not integrate phonemic awareness, phonics, vocabulary, fluency, comprehension strategies, reading and writing, listening and discussing, grammar in speaking and writing.
   **Secondary-**
   ___ Does not integrate the following components when appropriate into the subject area(s) taught: vocabulary, fluency, comprehension strategies, reading and writing, listening to and discussion, grammar in speaking and writing.

5. ___ Teaches math mostly from a textbook progressing from cover to cover.
COMPONENT 5:
THE LEARNING ENVIRONMENT

A. Ideal

1. ____ Learners can articulate what the acronym GREAT stands for and what it means to them personally.

2. ____ Learners do both of the following:
   • Perform self-assessments/self-testing, and are self-monitoring.
   • Show responsibility for doing assignments and ownership for grades.

3. ____ Learners exhibit the following:
   • Show kindness to others.
   • Find ways to use each other’s innate gifts.
   • Know and practice a process for solving conflicts.

4. ____ At any time learners can:
   • Tell how they are validated for their efforts.
   • Exhibit critical thinking and problem solving skills.
   • Share how learning is fun.
   • Exhibit specific study skills when appropriate.

5. ____ Learners regularly:
   • Share projects, skits, programs, etc. with others and the community.
   • Participate in learner-led parent/teacher conferences.
   • Demonstrate value of group work.

B. Progressing

1. ____ Learners can articulate what the acronym GREAT means.

2. ____ Learners do one of the following:
   • Perform self-assessments/self-testing, and are self-monitoring.
   • Show responsibility for doing assignments and ownership for grades.

3. ____ Learners exhibit one or two of the following:
   • Show kindness to others.
   • Find ways to use each other’s innate gifts.
   • Know and practice a process for solving conflicts.

4. ____ Learners often do three or four of the following:
   • Tell how they are validated for their efforts.
   • Exhibit critical thinking and problem solving skills.
   • Share how learning is fun.
   • Exhibit specific study skills when appropriate.

5. ____ Learners regularly:
   • Share projects, skits, programs, etc. with others and the community.
   • Participate in learner-led parent/teacher conferences.
C. Unacceptable

1. ___ Learners do not know what the acronym GREAT means.

2. ___ Learners do not do any of the following:
   - Perform self-assessments/self-testing, and are self-monitoring.
   - Show responsibility for doing assignments and ownership for grades.

3. ___ Learners do not do any of the following:
   - Show kindness to others.
   - Find ways to use each other’s innate gifts.
   - Know and practice a process for solving conflicts.

4. ___ Learners usually do not do more than one or two of the following:
   - Tell how they are validated for their efforts.
   - Exhibit critical thinking and problem solving skills.
   - Share how learning is fun.
   - Exhibit specific study skills when appropriate.

5. ___ Learners mostly:
   - Function primarily by completing assignments individually.
COMPONENT 6:

EXHIBITING PROFESSIONALISM

A. Ideal

1. ___ Participates in at least eight, regularly scheduled, professional development meetings using study groups or other collaborative professional growth forums. (See IC on p. 73.)

2. ___ Communicates clearly and systematically by:
   • Continual communication with students and parents
   • Celebrating learner success quickly and frequently
   • Collaborating with learner and parents for the success of the learner
   • Communicating curriculum goals and standards to learners, parents and school/center board

3. ___ Continually demonstrates all of the following by seeking opportunities to:
   • Be open and ready to learn and share with others.
   • Practice teamwork, networking, and using the value of the group process.
   • Collaborate with home-schooling parents, and other educational entities.
   • Promote Christian education within the church and community.

4. ___ Includes home, church, and community in the learning process with a regular and systematic plan.

5. ___ Has a documented Professional Development Plan that reveals the following:
   • Areas you have mastered
   • Areas you are working on
   • Short-term and long-term goals
   • Specific action plans with projected time frames for items 2 & 3 above
   • Portrays a philosophy of life-long improvement

6. ___ Has a professional portfolio which documents all of the above items in 5.

B. Progressing

1. ___ Participates in some – but less than eight – regularly scheduled, professional development meetings using study groups or other collaborative professional growth forums. (See IC on p. 73.)

2. ___ Communicates clearly and systematically by:
   • Continual communication with students and parents.
   • Celebrating learner success quickly and frequently.
   • Collaborating with learner and parents for the success of the learner.

3. ___ Usually demonstrates two or three of the following by seeking opportunities to:
   • Be open and ready to learn and share with others.
   • Practice teamwork, networking, and using the value of the group process.
   • Collaborate with home-schooling parents, and other educational entities.
   • Promote Christian education within the church and community.

4a. ___ Includes home, church, and community in the learning process with no regular and systematic plan.

4b. ___ Includes home, church, or community in the learning process.

5. ___ Has a documented Professional Development Plan that reveals 3 or 4 of the following:
   • Areas you have mastered
   • Areas you are working on
   • Short-term and long-term goals
   • Specific action plans with projected time frames for items 2 & 3 above
   • Portrays a philosophy of life-long improvement
C. Unacceptable

1. ___ Only participates in staff/faculty meetings or in-service/training sessions.

2. ___ Does not communicate clearly and systematically by:
   • Continual communication with students and parents
   • Celebrating learner success quickly and frequently
   • Collaborating with learner and parents for the success of the learner
   • Communicating curriculum goals and standards to learners, parents and school/center board

3. ___ Occasionally seeks one or less of the following opportunities to:
   • Be open and ready to learn and share with others
   • Practice teamwork, networking, and using the value of the group process
   • Collaborate with home-school / centering parents, and other educational entities
   • Promote Christian education within the church and community

4. ___ Does not usually include home, or church, or community in the learning process.

5. ___ Has no documented Professional Development Plan or shows only 2 or less of the following:
   a) Areas you have mastered
   b) Areas you are working on
   c) Short-term and long-term goals
   d) Specific action plans with projected time frames for items 2 & 3 above
   e) Portrays a philosophy of life-long improvement

6. ___ Has a professional portfolio that documents less than three of the above items or has no professional portfolio.
APPENDIX F

ADVENTIST EDGE SCHOOL INNOVATION CONFIGURATION CHECKLIST
School Components

COMPONENT 1:

GOD-CENTERED: INTEGRATION OF FAITH AND COMMUNITY

A. Ideal

1. ___ School sign and building entries clearly identify the school as Seventh-day Adventist.

2. ___ Friendliness is consistently exhibited by school personnel, pastors, and school board members when working for the students.

___ There is intentional focus of sharing personal spiritual stories with students.

3. ___ Weekly church and school spiritual activities include:
   • Administrator/teacher(s)
   • Pastor(s)
   • Student-led activities
   • School board member(s)

4. ___ There is an intentional design to:
   • Teach the fundamental beliefs of the Seventh-day Adventist Church.
   • Lead the students to have a personal relationship with Jesus Christ.
   • Evidence that students apply these Biblical principles in their everyday life.

5. ___ School conducts at least two weeks of prayer each year.

6. ___ Baptismal classes are available to students each semester.

B. Progressing

1. ___ School sign and building entries clearly identify the school as Seventh-day Adventist.

2. ___ Friendliness is usually exhibited by school personnel, pastors, and school board members when working with students.

___ Personal spiritual stories are usually shared with students.

3. ___ Weekly church and school spiritual activities include:
   • Administrator/teacher(s)
   • Pastor(s)
   • Student-led activities

4. ___ There is an intentional design to:
   • Teach the fundamental beliefs of the Seventh-day Adventist Church.
   • Lead the students to have a personal relationship with Jesus Christ.

5. ___ Has at least one week of prayer each year.

6. ___ Baptismal classes are available to students once a year.
C. Emerging

3. ____ School sign and building entries clearly identify the school as Seventh-day Adventist.

2. ____ Friendliness is occasionally exhibited by school personnel, pastors, and school board members when working with students.

3. ____ Personal spiritual stories are usually shared with students.

4. ____ Weekly church and school spiritual activities include:
   • Administrator/teacher(s)
   • Pastor(s)

5. ____ The fundamental beliefs of the Seventh-day Adventist Church are taught and students are led to Christ.

6. ____ Baptismal classes are occasionally available to students.

D. Unacceptable

1. ____ There is no school sign or the sign does not identify the school as Seventh-day Adventist.

2. ____ There is no evidence that friendliness is exhibited by school personnel or pastors when working with students.

3. ____ There is little or no intentional sharing of personal spiritual stories with the students.

4. ____ Weekly spiritual school activities do not include the pastor or other church members.

5. ____ There is no intentional design for teaching the fundamental beliefs of the Seventh-day Adventist Church or leading the students to have a personal relationship with Jesus Christ.

6. ____ School does not conduct weeks of prayer nor have baptismal classes.
COMPONENT 2:
RESULTS ORIENTED: INFORMED DECISION-MAKING

A. Ideal

1. ___ Academic and baptismal data are used to develop ongoing strategic plans which form instruction and intentionally invite students to accept Jesus Christ as their personal Savior.

2. ___ Record analysis is consistently used to modify ongoing strategic plans to ensure ultimate effectiveness.

3. ___ There are implemented, ongoing recruitment plans based on current data.

4. ___ The school has a professional, attractive, and current school website which includes the following:
   - User-friendly set-up
   - Mission statement
   - Distinctly Seventh-day Adventist/spiritual flavor
   - School handbook
   - Calendar of events
   - School application
   - Tuition/other fees
   - ANGEL link
   - Contact information
   - Coordinated with EDGE & school logos, colors, etc.
   - Adventist EDGE link
   - Provides a gift opportunity

5. ___ The administration and the school board have a written master technology plan that includes all of the following:
   - Maintaining current technology
   - Internet access for students and teachers
   - Internet safety software
   - Technology is seamlessly integrated and utilized in the instruction on a daily basis
   - Proper licensing of all software
   - Appointed IT person

6. ___ The administration and the school board provide and maintain current functioning library/media resources for all teachers and students.

B. Progressing

1. ___ Academic and baptismal data are used to develop school-wide plans for scholastic improvement and student acceptance of Jesus Christ as their personal Savior.

2. ___ There are implemented recruitment/retention plans based on data.

3. ___ There is a professional, attractive, and current school website.

4. ___ The administration and the school board has a master written technology plan that includes the following:
   - Maintaining current technology
   - Internet access for students and teachers
   - Internet safety software
   - Technology is integrated and utilized in the instruction on a daily basis
   - Proper licensing of all software

5. ___ The administration and the school board provide functioning library/media resources for all teachers and students.
C. Emerging

1. ___ Academic and baptismal data have resulted in individual teacher use of to form instruction and create opportunities for students to accept Jesus Christ as their personal Savior.

2. ___ There are recruitment/retention plans.

3. ___ A current website is provided.

4. ___ The administration and the school board has a written master technology plan that includes the following:
   • Maintaining current technology
   • Internet access for students and teachers
   • Internet safety software
   • Technology is integrated in the instruction

5. ___ The administration and the school board provide functioning library/media resources for all students.

D. Unacceptable

1. ___ The school has records that include both academic and baptismal data.

2. ___ There are no recruitment/retention plans.

3. ___ There is no website.

4. ___ There is no master technology plan.

5. ___ There is no library/media or is not in functioning order.
COMPONENT 3:

ENVIRONMENT THAT NURTURES: INVITATIONAL

A. Ideal

1. ____ All school signs, bulletin boards, and publications are invitational, professional, attractive, and often spiritual.
2. ____ Building and rooms are always physically and spiritually attractive.
3. ____ There is an implemented plan for meeting every visitor in a friendly and inviting manner.
4. ____ A safe, nurturing, Christ-like environment is intentionally provided and experienced by everyone at all times.
5. ____ Almost all the parents and students believe this is the school for them.
6. ____ The school culture intentionally respects diversity and continually models acceptance of each person as God’s creation.
7. ____ The school always invites and values suggestions and feedback in a Christ-like manner.
8. ____ Customer service is always invitational, intentional, and Christ-like.
9. ____ Has a published customer-centered resolution process based on Matthew 18.
10. ____ Healthy living principles are promoted and modeled by all employees and students.

B. Progressing

1. ____ Most school signs, publications, and bulletin boards are invitational, professional, and attractive.
2. ____ Building and rooms are usually physically and spiritually attractive.
3. ____ There is a plan for meeting every visitor in a friendly and inviting manner.
4. ____ A safe, nurturing, Christ-like environment is intentionally provided and experienced most of the time.
5. ____ Almost all the students and parents believe this is a great school for them.
6. ____ The school culture usually respects diversity and teaches acceptance of each person.
7. ____ The school usually invites suggestions and feedback.
8. ____ Customer service is usually invitational and intentional.
9. ____ Has a published customer-centered resolution process.
10. ____ Healthy living principles are promoted and modeled by most employees and students.
C. Emerging

1. ___ Some school signs, publications, and bulletin boards are invitational, professional, and attractive.
2. ___ Building and rooms are usually physically and attractive.
3. ___ There is a plan for meeting visitors who come to the school.
4. ___ A safe, nurturing, Christ-like environment is intentionally provided and experienced some of the time.
5. ___ Almost all the students and parents believe this is a good school for them.
6. ___ The school culture sometimes respects diversity and teaches acceptance of each person.
7. ___ The school sometimes invites suggestions and feedback.
8. ___ Customer service is sometimes invitational.
9. ___ Healthy living principles are promoted in the school.

D. Unacceptable

1. ___ School signs, publications, and bulletin boards are only functional.
2. ___ Building and rooms are functional.
3. ___ There is no plan for meeting visitors who come to the school.
4. ___ There is no intentional process for creating a safe, nurturing environment.
5. ___ Parents and students believe this is probably the right school for them.
6. ___ The school culture does not exhibit respect diversity nor acceptance of each person.
7. ___ The school does not invite suggestions or feedback.
8. ___ Customer service is not invitational.
9. ___ Has a resolution process.
10. ___ Healthy living principles are not promoted in the school.
COMPONENT 4:

ALIGNED WITH ADVENTIST AND NATIONAL STANDARDS: INSTRUCTION

A. Ideal

1. ___ Spiritual emphasis is appropriately incorporated into all instruction and activities.
2. ___ The school uses all the assessments types (outlined in the Teacher of Excellence IC) to improve the overall instructional program.
3. ___ All teachers have developed a community of learners and have effectively implemented two or more researched-based instructional strategies which honor the natural cycle of learning.
4. ___ Standards provide the foundation for differentiating instruction leading to mastery learning for every student.
5. ___ All curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready.

B. Progressing

1. ___ Spiritual emphasis is appropriately incorporated into most instruction and activities.
2. ___ The school uses 10 to 14 types of assessments (outlined in the Teacher of Excellence IC) to improve the overall instructional program.
3. ___ 75% to 99% of the teachers have developed a community of learners and have effectively implemented two or more researched-based instructional strategies which honor the natural cycle of learning.
4. ___ Standards provide the foundation for differentiating instruction leading to mastery learning for most students.
5. ___ Core curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready.

C. Emerging

1. ___ Spiritual emphasis is appropriately incorporated into some instruction and activities other than Bible class and worship.
2. ___ The school uses assessment to improve the overall instructional program.
3. ___ 26% to 74% of the teachers have developed a community of learners and effectively have implemented two or more researched-based instructional strategies which honor the natural cycle of learning.
4. ___ Standards provide the foundation for differentiating instruction leading to mastery learning for some student.
5. ___ Core curricula has *vertical alignment to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready.
D. Unacceptable

1. Spiritual emphasis is used only in Bible class and worship and activities.

2. The school does not use assessment to improve the overall instructional program.

3. Less than 25% of the teachers have developed a community of learners and effectively implemented two or more researched-based instructional strategies which honor the natural cycle of learning.

4. Standards, differentiating instruction, and mastery learning are not used.

5. There is no intentional vertical alignment of the curricula to develop skills with K-8 and/or 9-16 to prepare students to be workforce ready.
COMPONENT 5:
TEAM EFFORT: COLLABORATIVE AND SUPPORTIVE COMMUNITY

A. Ideal
1. ___ The school supports the local Seventh-day Adventist church through a systematic and regular participation in the Sabbath services and other programs.
2. ___ The Adventist EDGE logo is continually associated with everything:
   - School sign
   - Website
   - Brochures/promotional material
   - Handbook
   - Application form
3. ___ The school has current accreditation with the Adventist Accrediting Association (AAA) with an on-going plan for addressing recommendations and action plans.
4. ___ The school has a concise, published and posted mission statement with input from all stakeholders that can be recited by most and easily used in daily instruction.
5. ___ The meaning of the acronym “GREAT” is known by the school personnel, parents, students, and constituents.
6. ___ Administrators, teachers, students, parents, and school board members know and understand their own personal learning style and how it affects their learning and relationship with others.
7. ___ Communication to parents includes:
   - Regular timing
   - Administrator/teachers
   - Electronic delivery
   - Students
   - Effectiveness
   - Fostering teamwork between home and school
8. ___ Teacher Study/Discipline Groups include all 13 checklist components found in the EDGE handbook.

B. Progressing
1. ___ The school supports the local Seventh-day Adventist church through participation in the Sabbath services and other programs.
2. ___ The Adventist EDGE logo is continually displayed at the school.
3. ___ The school has current accreditation with the Adventist Accrediting Association (AAA) with a plan for addressing recommendations and action plans.
4. ___ The school has a concise, published, and posted mission statement with input from all stakeholders.
5. ___ The meaning of the acronym “GREAT” is known by the school personnel, parents, and students.
6. ___ Teachers, students, and parents know and understand their own personal learning style and how it affects their learning and relationship with others.
7. ___ Communication to parents includes:
   - Regular timing
   - Administrator/teacher
   - Electronic delivery
   - Students
   - Effectiveness
8. ___ Teacher Study/Discipline Groups include 10-12 items of the component checklist found in the EDGE handbook.
C. Emerging

1. ___ The school supports the local Seventh-day Adventist church through occasional participation in the Sabbath services and other programs.

2. ___ The Adventist EDGE logo is sometimes displayed at the school.

3. ___ The school has current certification with the Adventist Accrediting Association (AAA).

4. ___ The school has a concise, written mission statement developed with input from all stakeholders.

5. ___ The meaning of the acronym “GREAT” is known by the school personnel.

6. ___ Teachers and students know and understand their own personal learning style and how it affects their relationship with others.

7. ___ Communication to parents includes:
   • Regular timing
   • Administrator/teachers
   • Electronic delivery
   • Effectiveness

8. ___ Teacher Study /Discipline Groups include 7-9 items of the component checklist found in the EDGE handbook.

D. Unacceptable

1. ___ The school supports the local Seventh-day Adventist church through yearly/seasonally school programs.

2. ___ The Adventist EDGE logo is not displayed.

3. ___ The school does not have current accreditation with the Adventist Accrediting Association (AAA) or is on probationary status.

4. ___ The school has no mission statement.

5. ___ There is an awareness that GREAT is an acronym in Adventist EDGE.

6. ___ There is an awareness that different learning styles exist.

7. ___ Communication to parents is occasional or as the school perceives the need.

8. ___ Teacher Study/Discipline Groups include less than 7 items of the component checklist found in the EDGE handbook.
APPENDIX G

SOUTHERN UNION OFFICIAL VOTE TO ACCEPT THE TEACHER
AND SCHOOL INNOVATION CONFIGURATIONS
VOTED: that the Adventist EDGE “School of Excellence” Pilot Rubric status be changed to permanent; and should any revisions or updates take place in the future, the date would be indicated in a footer on each page and the revised document would be placed on the Adventist EDGE website.
REFERENCE LIST
REFERENCE LIST


VITA

NAME Pamela Christine Forbes

EMPLOYMENT HISTORY

1998–Present  Associate Superintendent of Education, Carolina Conference of Seventh-day Adventists, Charlotte, NC
1984–1998  One Teacher School, Carolina Conference, Rutherfordton, NC
1984–1984  Principal/Teacher, Carolina Conference, Spartanburg, SC
1979–1984  One-Room School & Head Teacher, Georgia-Cumberland Conference of Seventh-day Adventists
1977, Jan.–May  Teacher, completed the year for a teacher that was killed. Georgia-Cumberland Conference of Seventh-day Adventists
1975–1976  Teacher: music, math, science, & health, Harbert Hills Academy, Savannah, TN
1974–1975  Teacher and work / study coordinator, Arkansas-Louisiana Conference of Seventh-day Adventists

EDUCATION

1980  B.S.  Elementary Education; Minors: Religion & Music, Southern Adventist University, Colledale, TN
1998  M.Ed.  Multigrade / Multiage Classroom (Inclusion), Southern Adventist University, Colledale, TN
2011  Ph.D.  Leadership Education, Andrews University Berrien Springs, MI

PROFESSIONAL  NAD Professional Certification

AWARDS

Manchester Who’s Who
Who’s Who Historical Society
Woman of the Year, American Biographical Institute
PROFESSIONAL MEMBERSHIPS

Phi Delta Kappa
ASCD

INTERESTS

Helping People Learn and Grow
Plant-based Diet and Anti-aging
Healthy Life-style
  Music
  Gardening
  Reading
  Travel
  Relationships