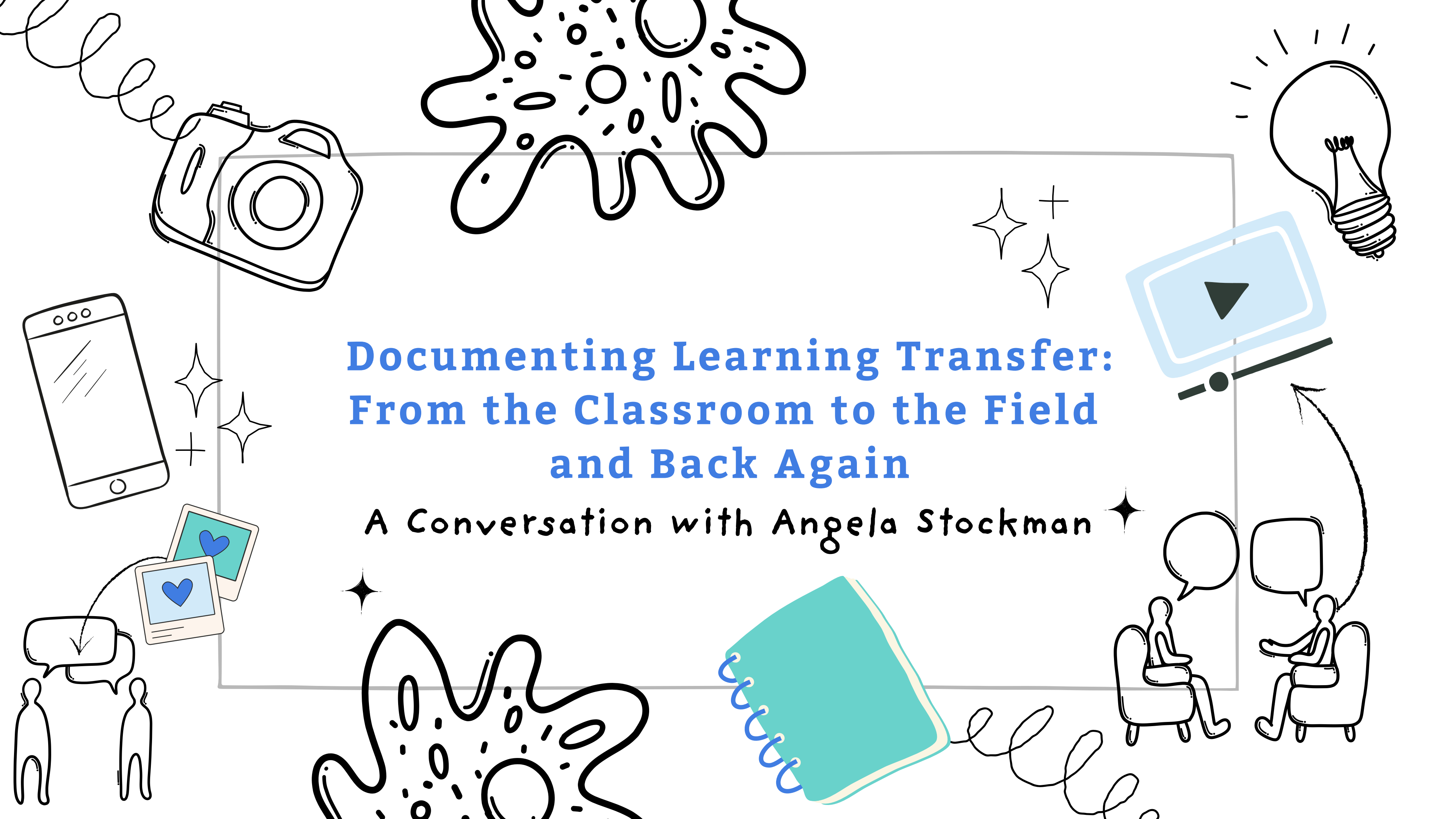# Documenting Learning Transfer: From the Classroom to the Field and Back Again

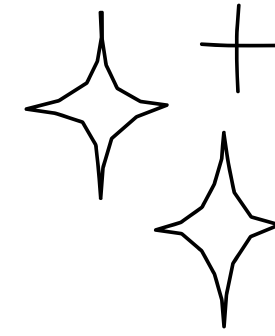## A Conversation with Angela Stockman

https://tinyurl.com/7fmbmbd9

Today's Slides

The Plan

:earners who practice pedagogical documentation capture the process using multimedia tools and then, use the evidence gathered to tell rich learning stories that honor the whole of who they are and what they've experienced.
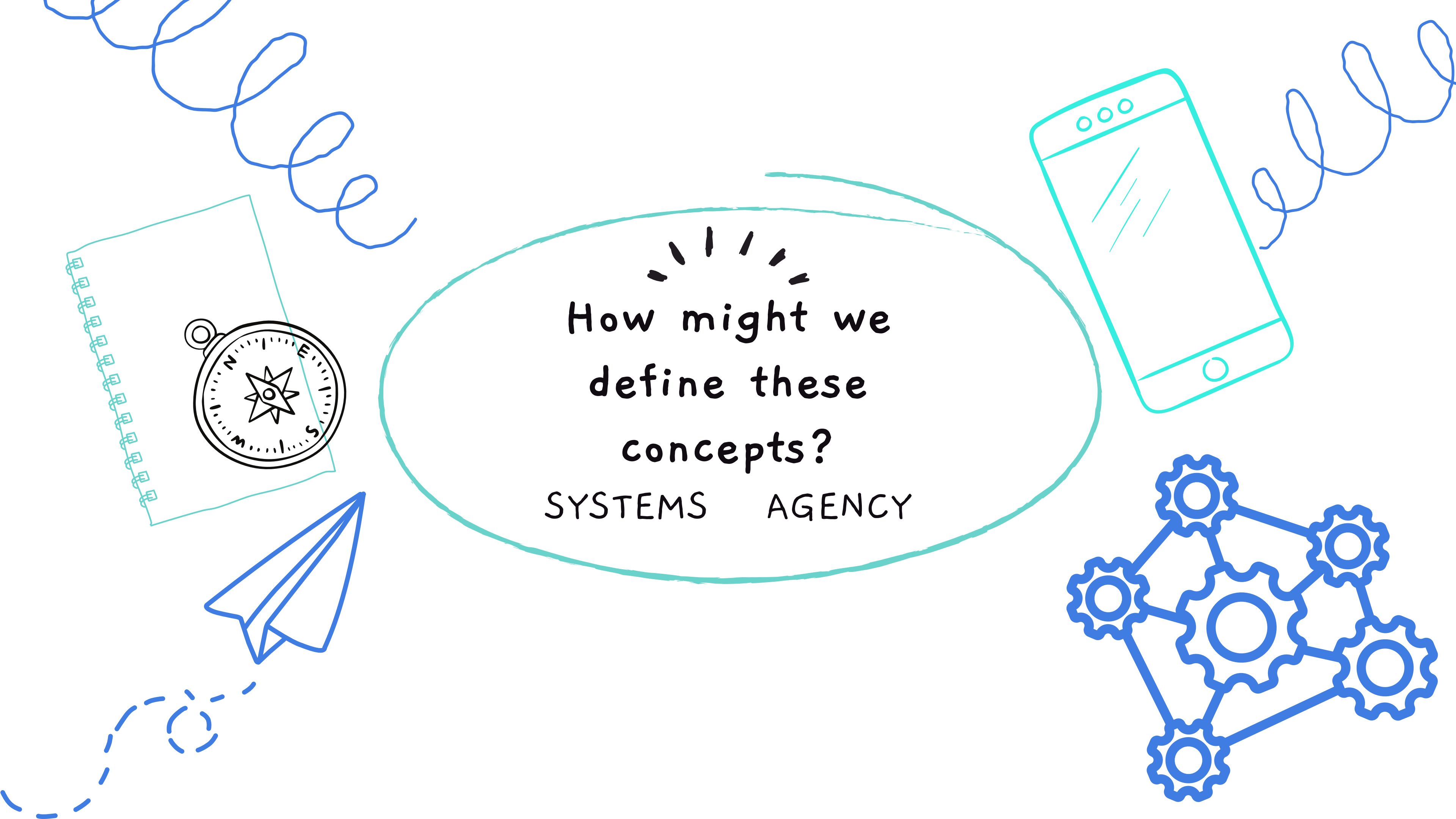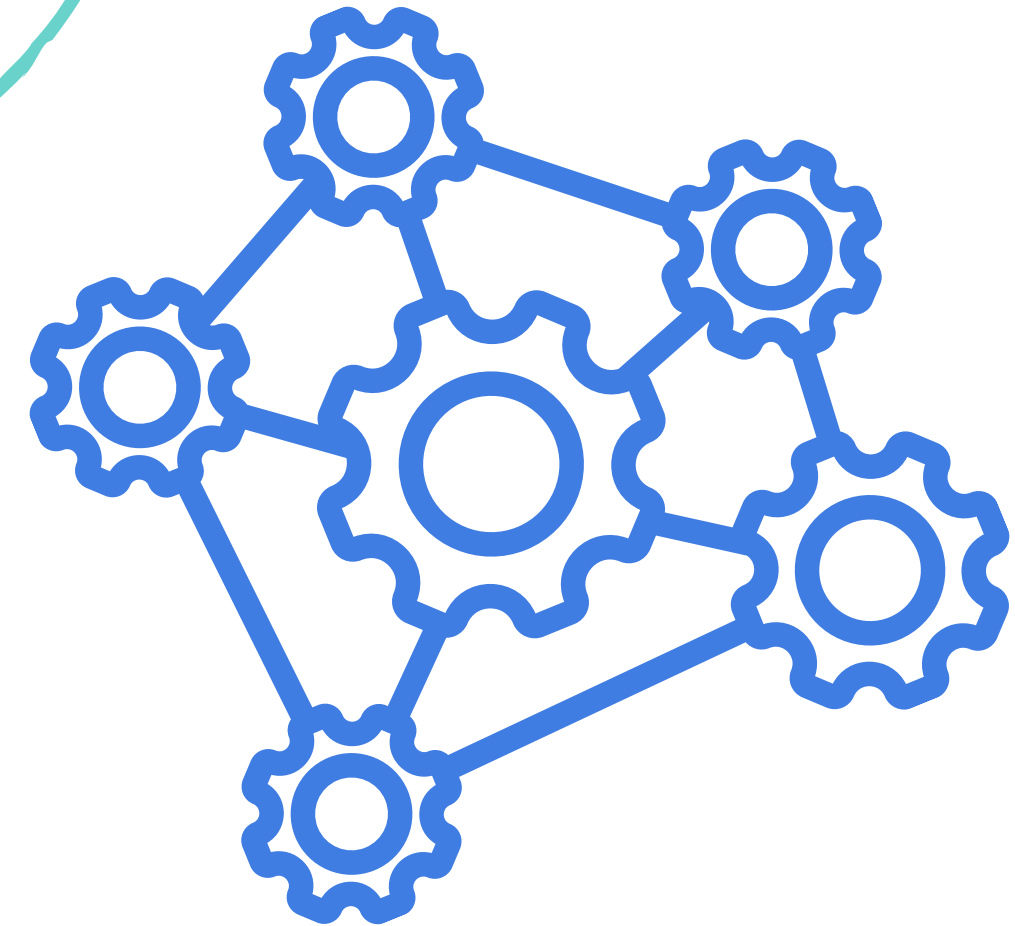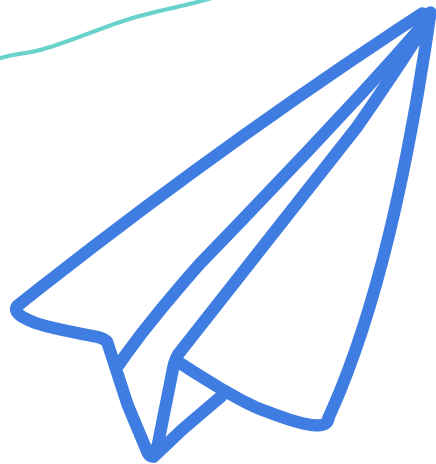
We are all learners.

This session will:
- Lay the process of pedagogical documentation bare
- Showcase stories of students and teachers leveraging documentation to support learning transfer
- Equip everyone to begin similar work in their own classrooms

Hi! I'm **Angela**

How might we
define these
concepts?
SYSTEMS   AGENCY
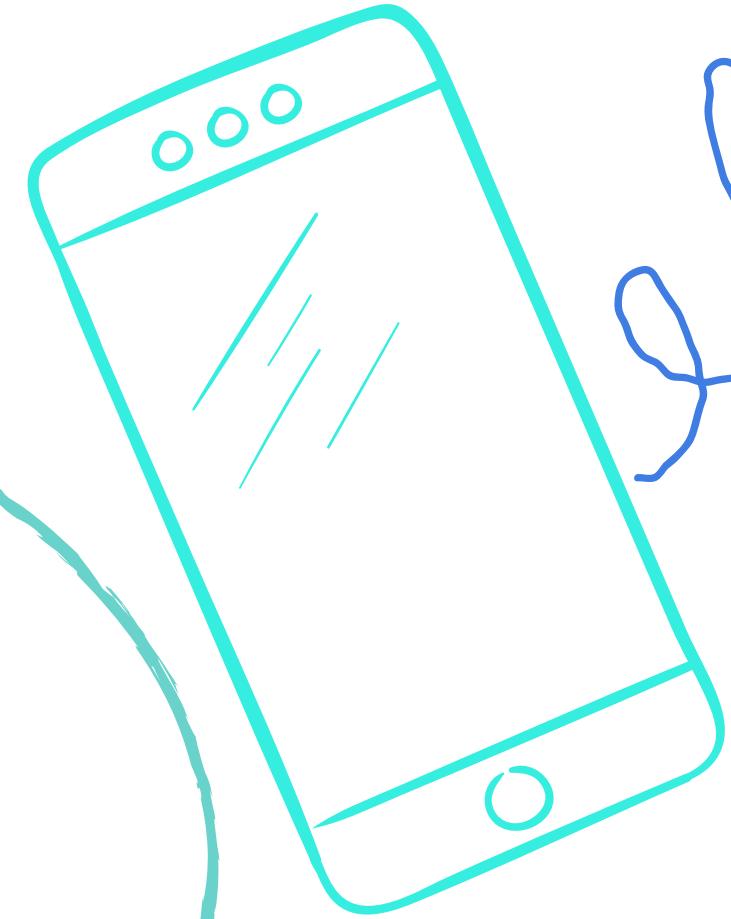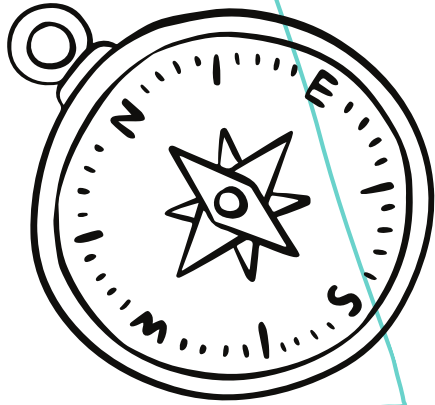
THE ACT MODEL

ACQUIRE

Acquire concept knowledge:

narrative   character
problem   solution   setting
imaginary event   sequence

CONNECT

Connect concepts to similar
examples AND personal work.

TRANSFER

Transfer concepts to
dissimilar or unfamiliar
examples and innovative
personal work.

Adapted from Stern et. al, 2021

Figure 2.14   The Learning Transfer Spectrum

Dissimilar

INNOVATION

Transfer to highly
dissimilar school tasks

Transfer to highly
dissimilar, real-world
scenarios

Academic

Real-World

Transfer to highly
similar school tasks

How

Transfer to highly
similar, real-world
scenarios

Similar

What is the relationship between systems, individuals, and agency?

How do we leverage it to care for one another?

LEARNER

TEACHER

What is the relationship between systems, individuals, and agency?

How do we leverage it to care for one another?

LEARNING
CONTEXT

TEACHING
CONTEXT
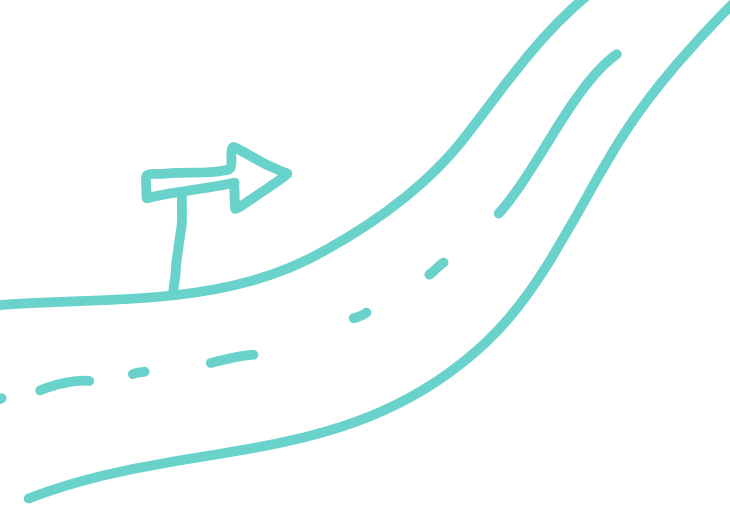
"While experts have much to share and theories about what constitutes
a best practice continue to form and then crucmble inside of current realities,
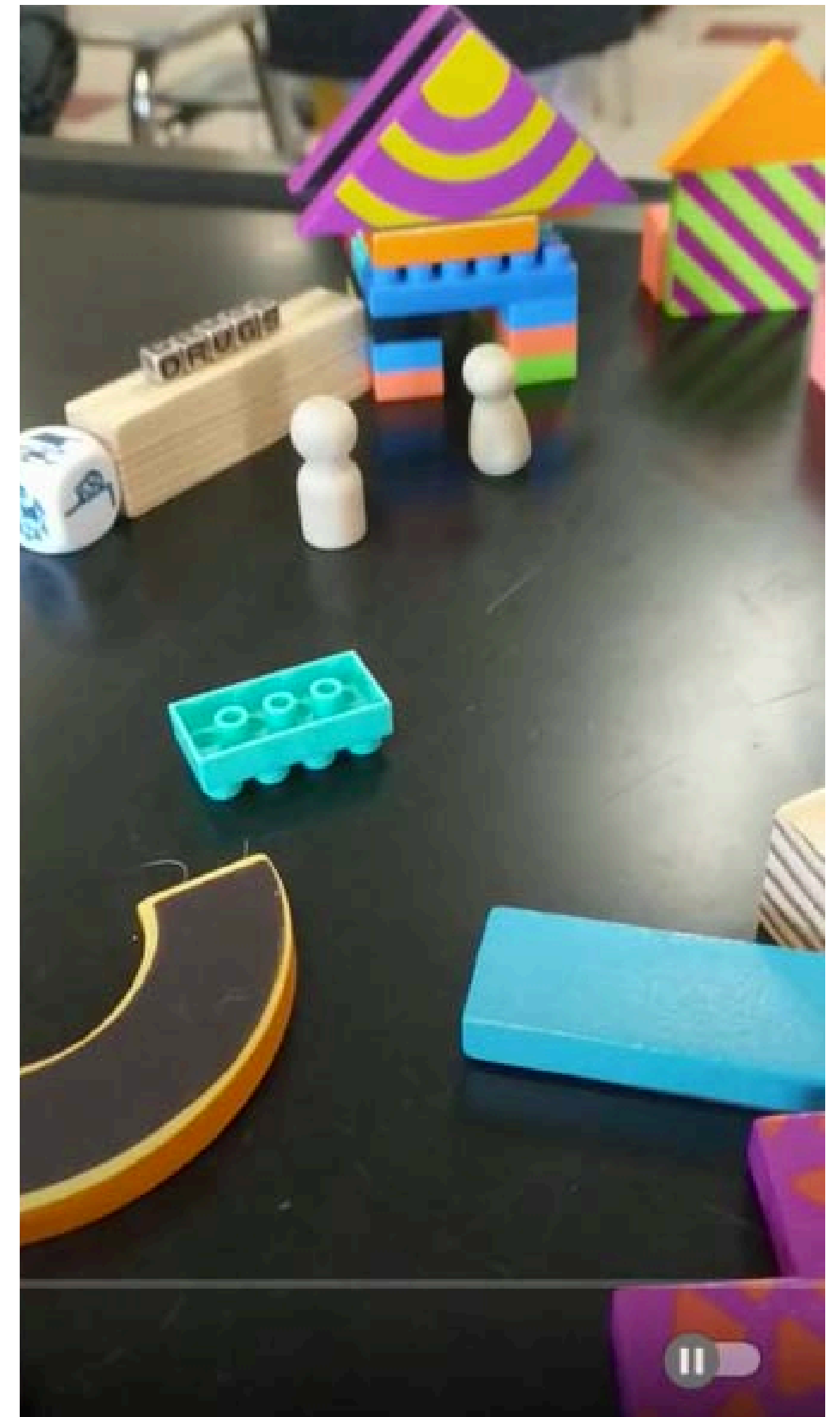I know that this much is true: Developing the dispositions of a documentarian has made
me a far better teacher. It illuminated pathways through deep darkness and quieted
the noise that always echoes in such spaces. It helped me move writers forward.
Documentation made the whole of my life deeply worthwhile in ways it wouldn't
be otherwise. It also kept me hungry, happy, and able to be awestruck in any given moment.
Documentation is about living m life in full color, rather than living a sepia-toned existence.
This is what I want for you."

The Writing Teacher's Guide to Pedagogical Documentation

The Different Postures that Documentarians Assume

Make Learning Visible

Plan

Observe

PURPOSE

Invite Perspective

Document Learning

Interpret

Modes, Tools, Purposes

How will they make learning visible?	Appropriate Tools	Purposes
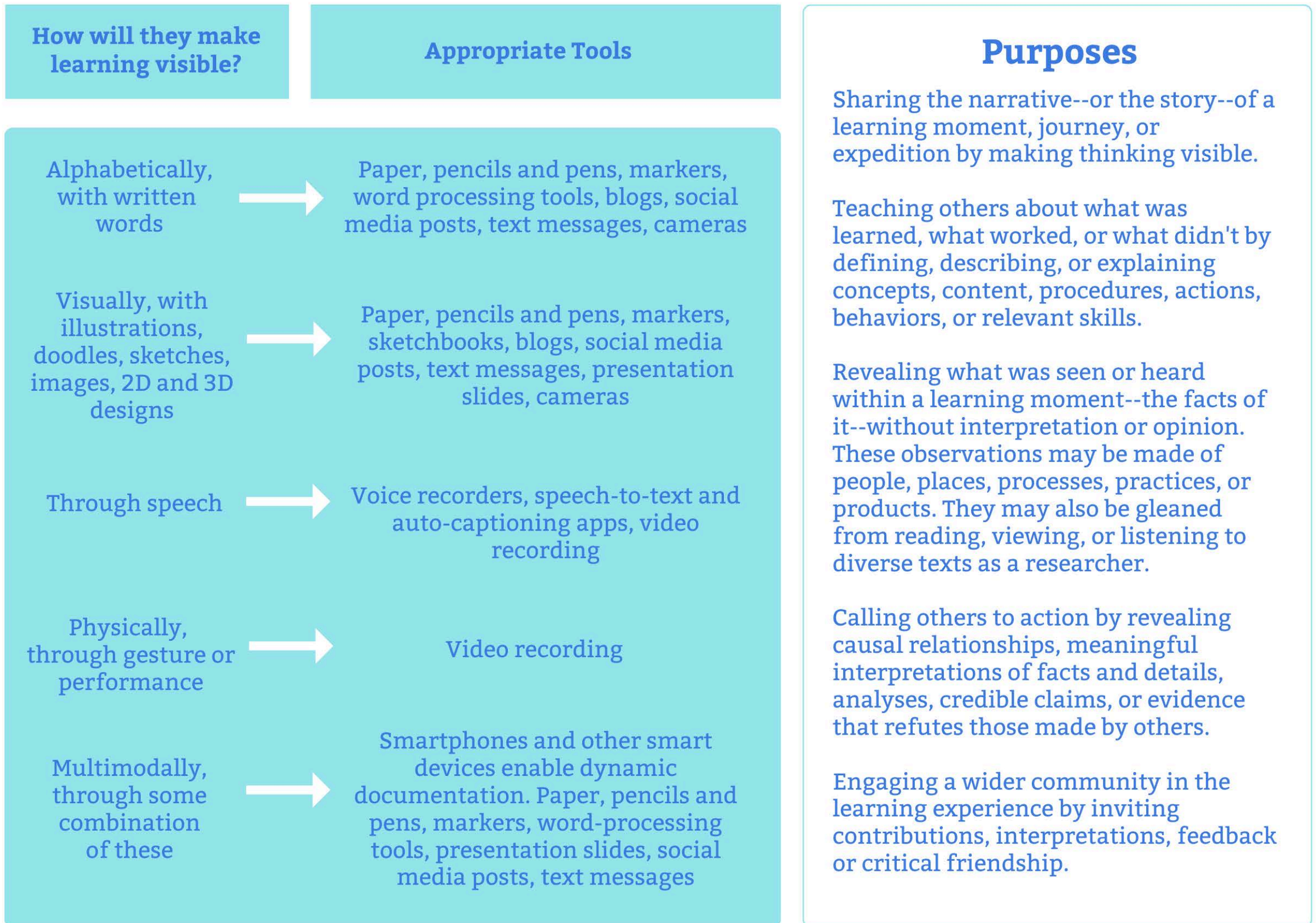| Alphabetically, with written words | Paper, pencils and pens, markers, word processing tools, blogs, social media posts, text messages, cameras | Sharing the narrative--or the story--of a learning moment, journey, or expedition by making thinking visible.

Teaching others about what was learned, what worked, or what didn't by defining, describing, or explaining concepts, content, procedures, actions, behaviors, or relevant skills.

Revealing what was seen or heard within a learning moment--the facts of it--without interpretation or opinion. These observations may be made of people, places, processes, practices, or products. They may also be gleaned from reading, viewing, or listening to diverse texts as a researcher.

Calling others to action by revealing causal relationships, meaningful interpretations of facts and details, analyses, credible claims, or evidence that refutes those made by others.

Engaging a wider community in the learning experience by inviting contributions, interpretations, feedback or critical friendship. |
| Visually, with illustrations, doodles, sketches, images, 2D and 3D designs | Paper, pencils and pens, markers, sketchbooks, blogs, social media posts, text messages, presentation slides, cameras | |
Through speech	Voice recorders, speech-to-text and auto-captioning apps, video recording	
Physically, through gesture or performance	Video recording	
Multimodally, through some combination of these	Smartphones and other smart devices enable dynamic documentation. Paper, pencils and pens, markers, word-processing tools, presentation slides, social media posts, text messages	

Inviting Diverse Perspectives

When we invite the people we're interested in learning about and from to co-create documentation projects with us and then, capture and interpret evidence of learning, their perspectives have a far greater influence on our own.

When we invite critical friends and even skeptics to share their feedback and their own interpretations of our data, we are made better aware of flaws in our thinking, the potential unintended consequences of our work, and how we might potentially be planning to do harm or worse-- possibly causing it.

When it isn't possible to invite subjects, critical friends, or skeptics to join us in our work, it's important that we remain honest about the potential for bias and other limitations in our findings.

Before

During

After
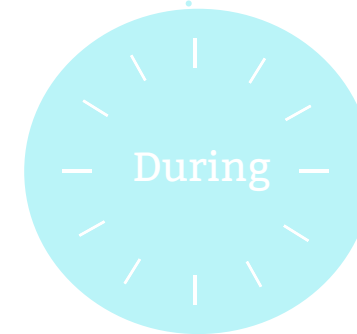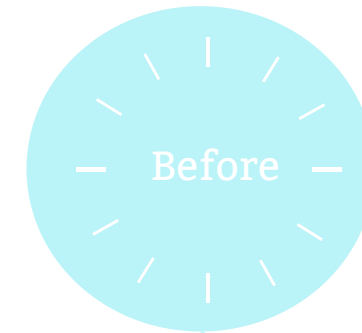
Before Documenting

- Co-create the project with those who will be most affected by it.
- Invite critical friends to share their feedback and suggestions.
- Invite those whose identities are different from your own to do the same.

As You Document

- Invite your subjects to document beside you.
- Invite colleagues to do the same.
- Invite feedback from critical friends and those whose identities are different from your own.

As You Interpret Data

- Invite your subjects to share their insights first.
- Invite colleagues to do the same.
- Invite critical friends and even-- skeptics--to share their perspectives.
- Invite others to interpret your data in your absence and without the greater context of the project.
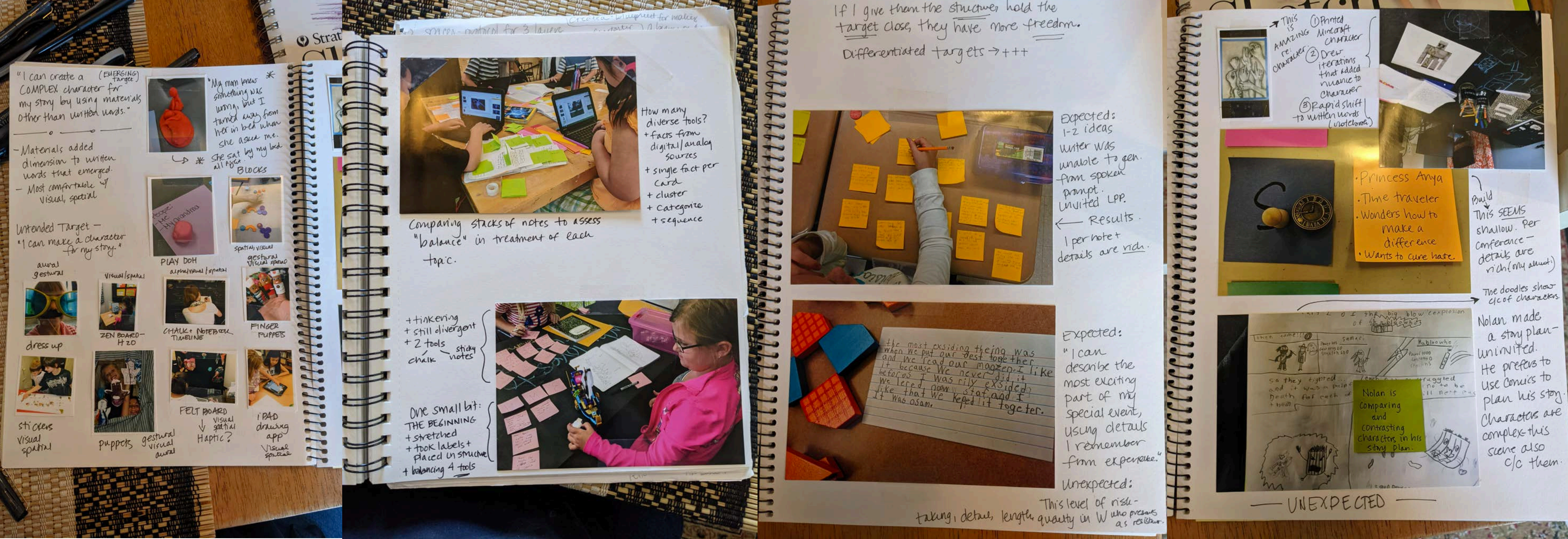
Notebooks, Digital Photo Albums, Documentation Panels, Learning Walls, Apps, and Tables
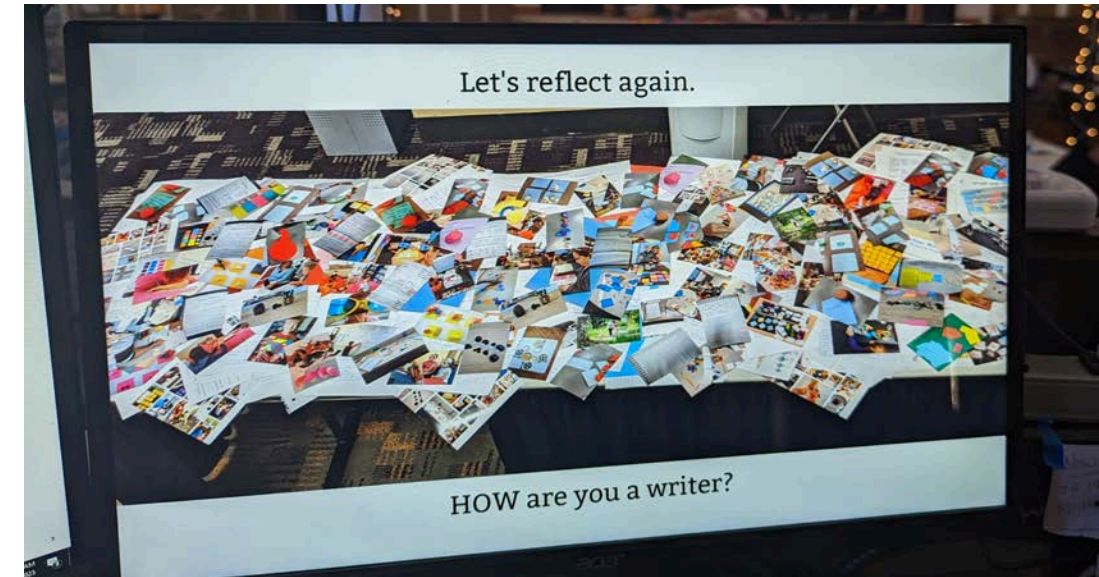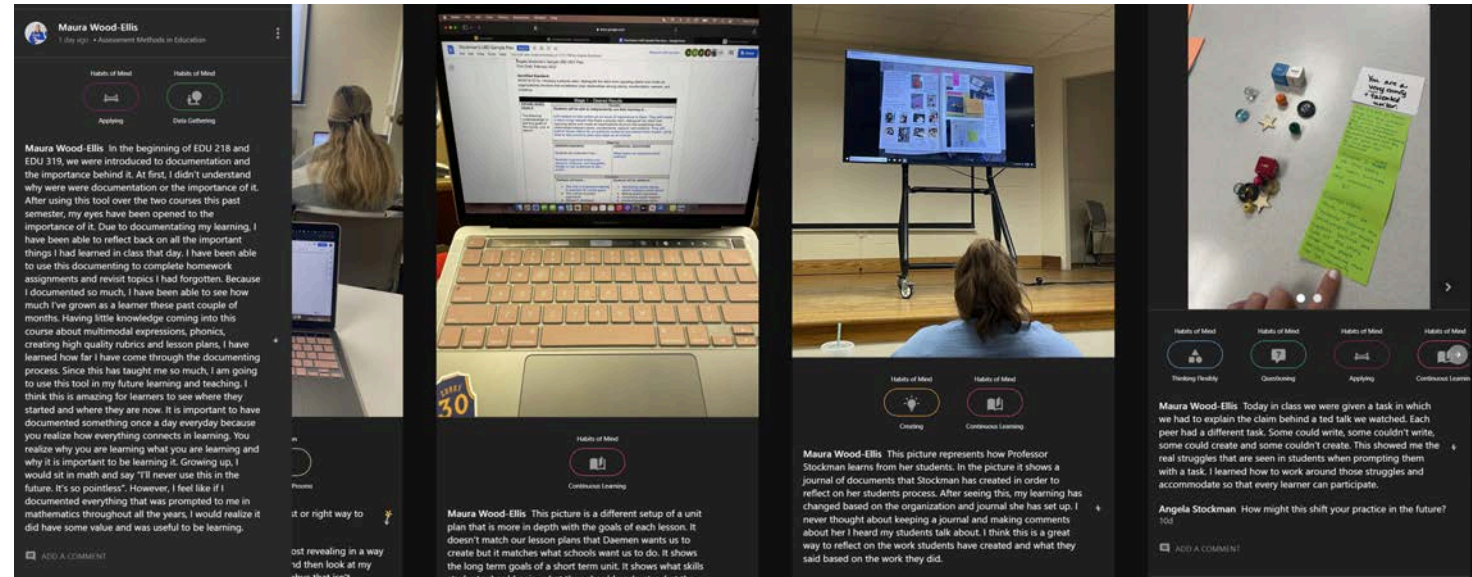
CULTURE MATTERS

Communal Cultures Value

Learning that invites presence.
It's experiential and social.

Community, and identity is often contextualized by how the self relates to the group.

The affordances of each mode of expression and the harmony between them.

Individualistic Cultures Value

Independent learning that is often facilitated through text study.

Identity is centered on self.

The fact that alphabetic text and print enable memory making and keeping.

CULTURE MATTERS

Communal Cultures Value

Forceful language, filled with spirit. Audacity, fluency, volubility.

Thought and expression serves to unify, rhapsodize, centralize.

Writing that may take the shape of a list. It's paratactic and omits subordinating conjunctions.

I *wasn't feeling well. I stayed home to rest. I felt better.*

Individualistic Cultures Value

Clear language, filled with detail.

Thought and expression invite analysis.

Writing that may be hypotactic, making use of subordinating conjunctions to signal relationships.

Because I wasn't feeling well, I decided to stay home and rest until I felt better.

CULTURE MATTERS

Communal Cultures Value

Good writing that totalizes.
It distills complex ideas into concepts that can be easily retained, reframed, shared.

Cunning, canniness, and riddles. These are valued and a powerful tool for argument.

First drafts and spoken word. Correction may be viewed as counterproductive, presenting the speaker appear ill prepared or lacking credibility.

Individualistic Cultures Value

Good writing that is robust, intricate, detailed.

Tight claims, clear evidence, and clear frames as powerful tools for argument.

Print enables writers to correct perceived errors, and individualists value this.

What is the relationship between systems, individuals, and agency?

How do we leverage it to care for one another?

Simple Ways to Begin

Document the unexpected.

Document joy.
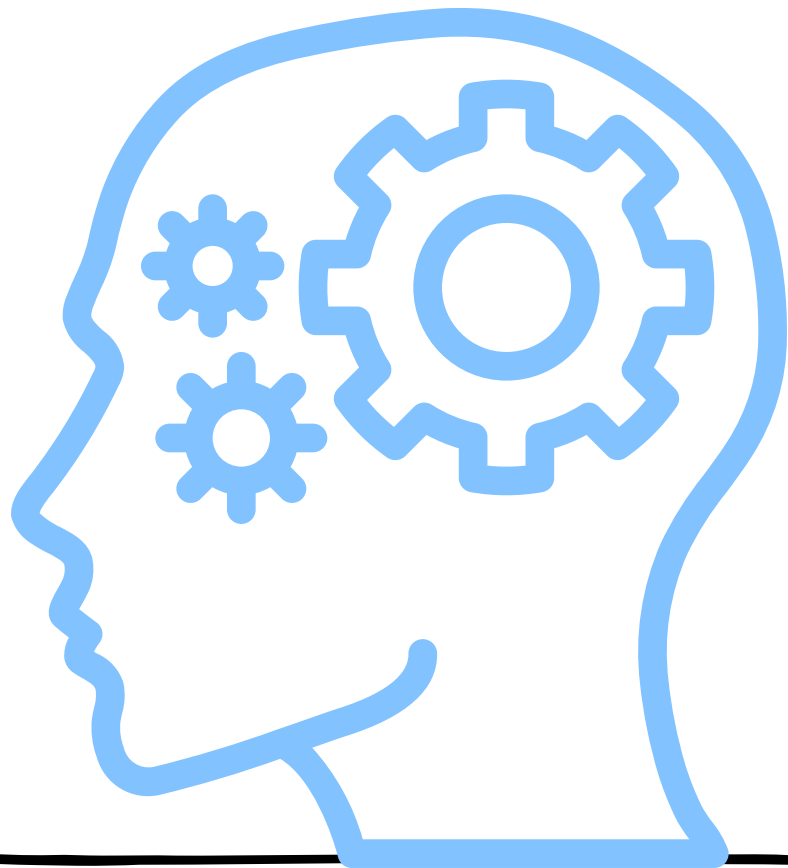
Document frustration.

Document courage.

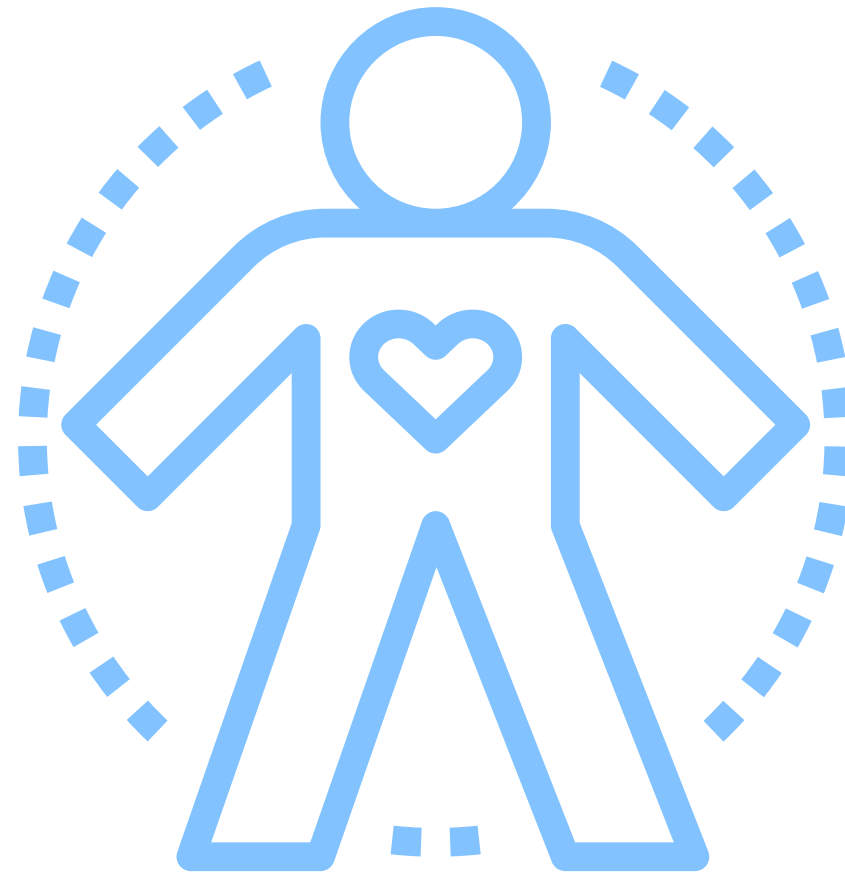Document shift.

Document the spark.

Document the silly.

Making it a Bit More Purposeful

| MIND | BODY | SPIRIT |

A Few More Straightforward Ways to Begin

Choose a Single Setting

Commit to capturing a certain number of photos or recordings within a specific period of time.

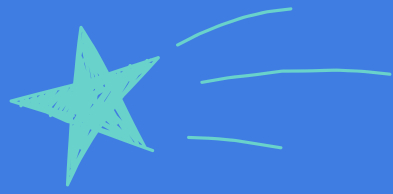**Nouns, Adjectives, Verbs, and Adverbs**

Pick one that matters, and document its presence.

Chase a Question:

Where did you notice a shift in your mood today?

Deepening the Meaning

What do you believe
about learning?
About yourself as a learner?
How are you living those beliefs?
How are you interrogating them?

What do you
WONDER about?

How are you chasing
your curiosities?

What makes this
effort fulfilling?

How could it be
even better?

Let's Reflect:

I'm at my best when...

I'm at my worst when...

These are the ways in which my personal
self and professionalself get along well...

This is how we are at odds...

Inside the classroom, I'm especially good at...

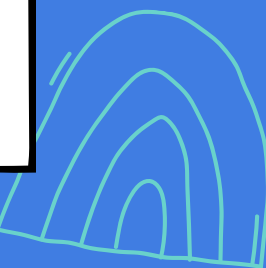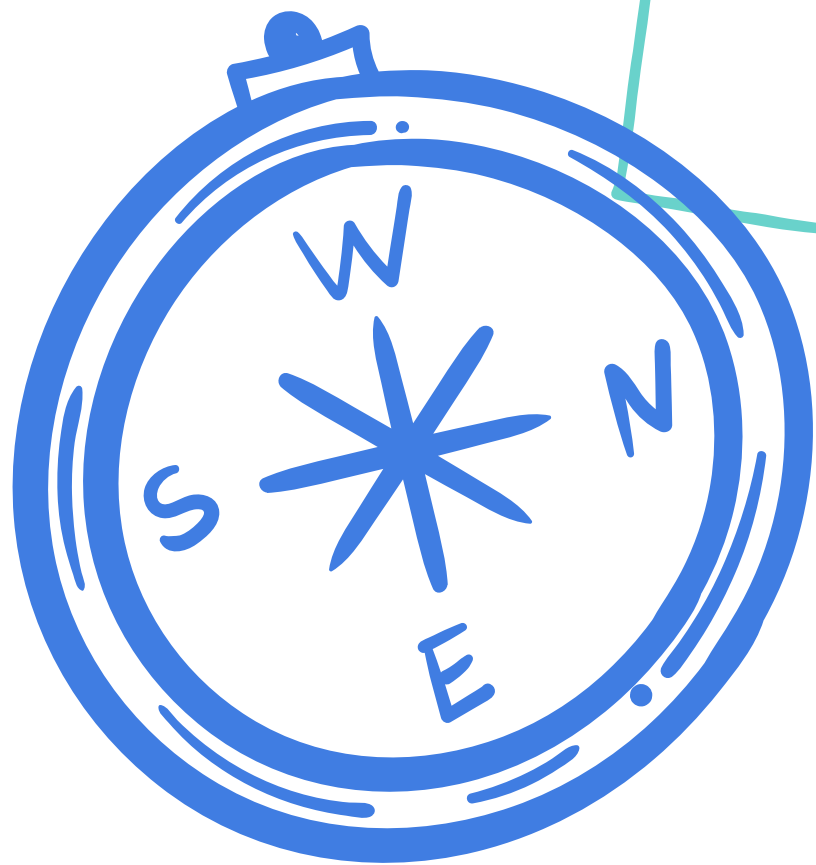Outside of the classroom, I'm complimented for...

The most important thing I'd like to better
understand about myself is...

These are the questions that are eternally
engaging me, personally...

These are my enduring questions as an educator...

This is the learning that might sustain me
over the course of my career...

This is the legacy I hope to leave behind...

Aligning Vision, Purpose, and Practice

Is your process deductive or inductive?

Deductive

What theory or idea will you test? What is your guiding question?

What will serve as evidence of learning?

Inductive

What concept or topic will you look and listen for?

When will you document?

Where will you document?

Who will you document?

How might you coplan this project with those who will be most impacted by it?

How might you find helpers?

[Explore My Digital Documentation Notebook](#)

This phase of the process often takes some time, and I try not to rush people through this work. Often, clusters are made and remade as those analyzing the images notice different--and perhaps more meaningful--patterns and themes.

Here, we often begin coding our data with nouns, verbs, adjectives, and adverbs that define the trends we are seeing as well. Sticky notes are put to work in an entirely different way.
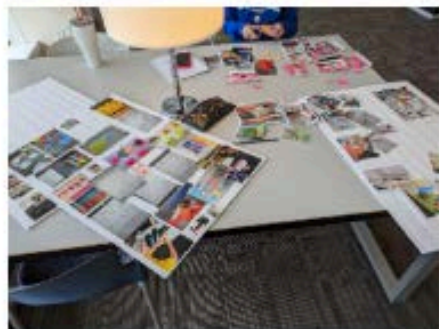
Once hands stop moving and I'm certain the stacks are steady, I offer each collaborator a foam board and small box of tacks. They begin storyboarding their findings, with the intention to share a theory. The boards are lightweight and the tacks can be removed. This is important to our ongoing work. As each person shares their story and others listen in, connections are made. Images from different boards connect to another. Theories combine. Narratives are made and remade.

Each time I am invited to visit with K-12 teachers to facilitate professional learning, I often bring my photo collection, tacks, and boards and move them through this highly reflective data analysis process. My primary intention is to coach documentation in a way that prepares teachers to replicate it. It's interesting to see how different individuals from very different groups establish affinities and form theories. Each experience reveals something that I hadn't thought of before. Each new perspective informs and often challenges my own as well.

When I'm facilitating sustained documentation cycles in schools, our storyboards often evolve to include learning artifacts, annotations, and written reflections that read much like action research case studies. The examples that follow were gathered from my work in my writing studio and in Akron Central School District in western New York State.
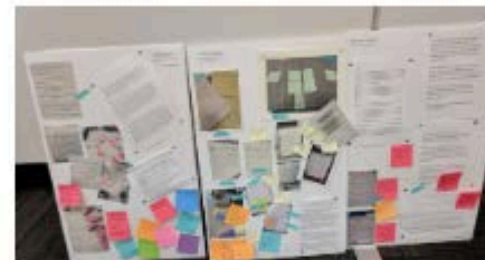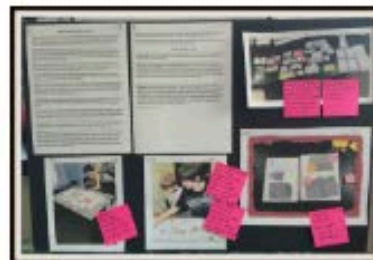
Learning from Lisa Green: When Documentation Elevates Engagement

My Intention: Documenting an Expedition to Understand

Protocol: [Drowning in Qualitative Data? Start Coding](#)
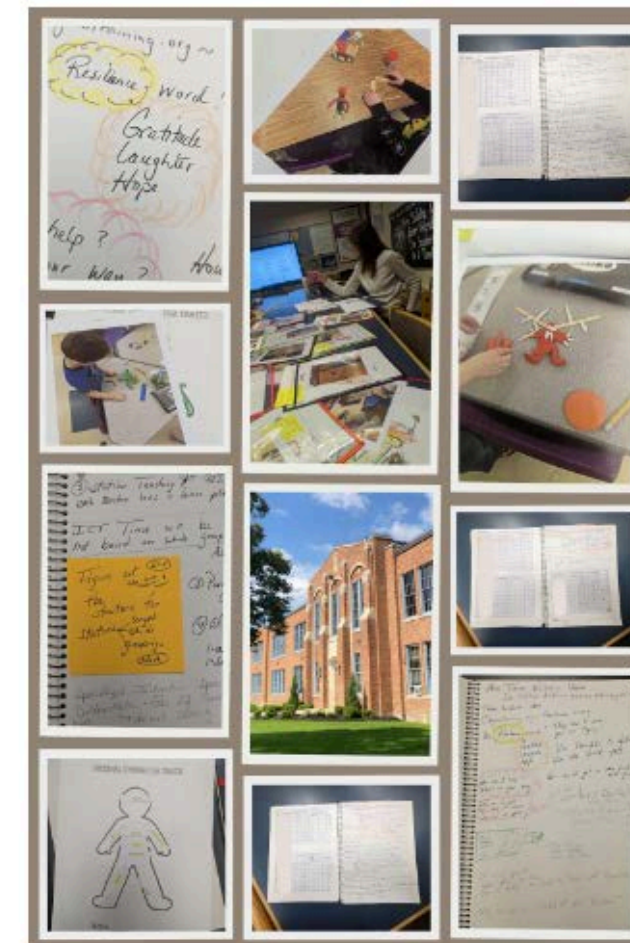
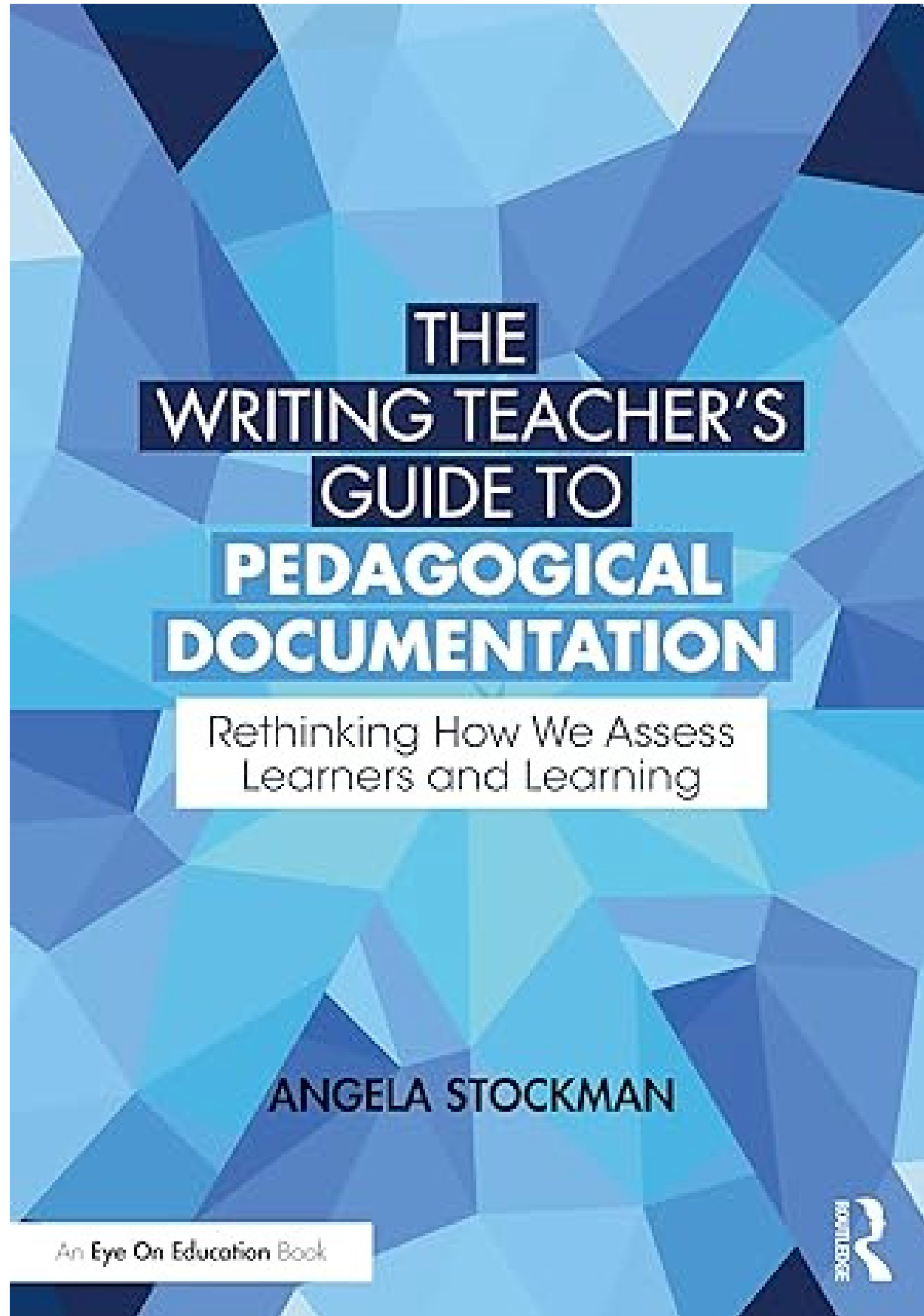Introduction and Statement of the Research Opportunity:

As Lisa Green began documenting her learning about the young readers and writers who were studying Greek Mythology in her primary classroom in West Valley, New York, I began documenting what Lisa was teaching me about pedagogical documentation. I wondered: What would Lisa find most meaningful about the process? What could I learn from her?

Methodology

Pre-Assessment: Prior to beginning this particular project, I'd interviewed Lisa about her prior documentation experiences. She invited me to take photographs of her documentation notebooks and spoke to her early work. Lisa's first documentation projects invited a study of learner progress toward established academic goals or

Try a Self-Assessment

Using the ARCS Framework to Plan a Documentation Project

Alignment	Representation	Culture	Sustainability
How will I ensure that these purposes align to the greater vision for who I am trying to become? How might align my documentation efforts to: • My own interests and needs? • The needs and interests of those I serve? • The needs and interests of the system I serve? How will I intentionally assess alignment as I plan and work through this project? How will I know when misalignment exists? How might I plan to address this?	Whose voices and perspectives should inform the way I plan my project? Who should provide perspective as it unfolds? How? Who should be involved in the interpretation of the findings? How will I ensure that those who will be most affected by this work have significant influence over its design and the way it is executed? How will I continue to assess representation as this project unfolds? How will I mitigate misrepresentation in my work?	What is my vision of the culture I hope to shape through my teaching, learning, and documentation efforts? Which norms, values, protocols, and dispositions will I intentionally cultivate? Who might help me better understand the potential consequences of my choices and their impact on community culture? How will I engage critical friends and seek diverse perspectives as I plan and execute my project?	How will I sustain the most meaningful aspects of this work beyond the present moment? How will this learning, in this moment, for these very specific purposes nurture and sustain my greater vision? When I look back on this project in the distant future, how will I remember it in the context of the greater legacy that I hope to leave behind? Who might sustain this thinking, learning, or work in my absence? How do I make all of this accessible to them right now? How do I position myself as a partner in this learning?

Kniep, G. (2008). Communities that lead, learn, and last: Building and sustaining educational expertise. Jossey-Bass.

Which pieces are missing from this framework?

Define them explicitly.

Now, use those missing pieces as lenses
to deepen and refine your own work.

Expanding a Moment into a Journey or an Expedition

- Analyze initial moments and identify specific elements that could be explored further.
- Keep the context the same, but shift your purpose, point of view, or practice in subsequent moments.
- Notice patterns or trends emerging across moments.
- Make connections across these varied moments. Analyze relationships and connections between different documented moments.
- Share your discoveries as the journey unfolds and seek different perspectives.
- Twist the kaleidoscope.
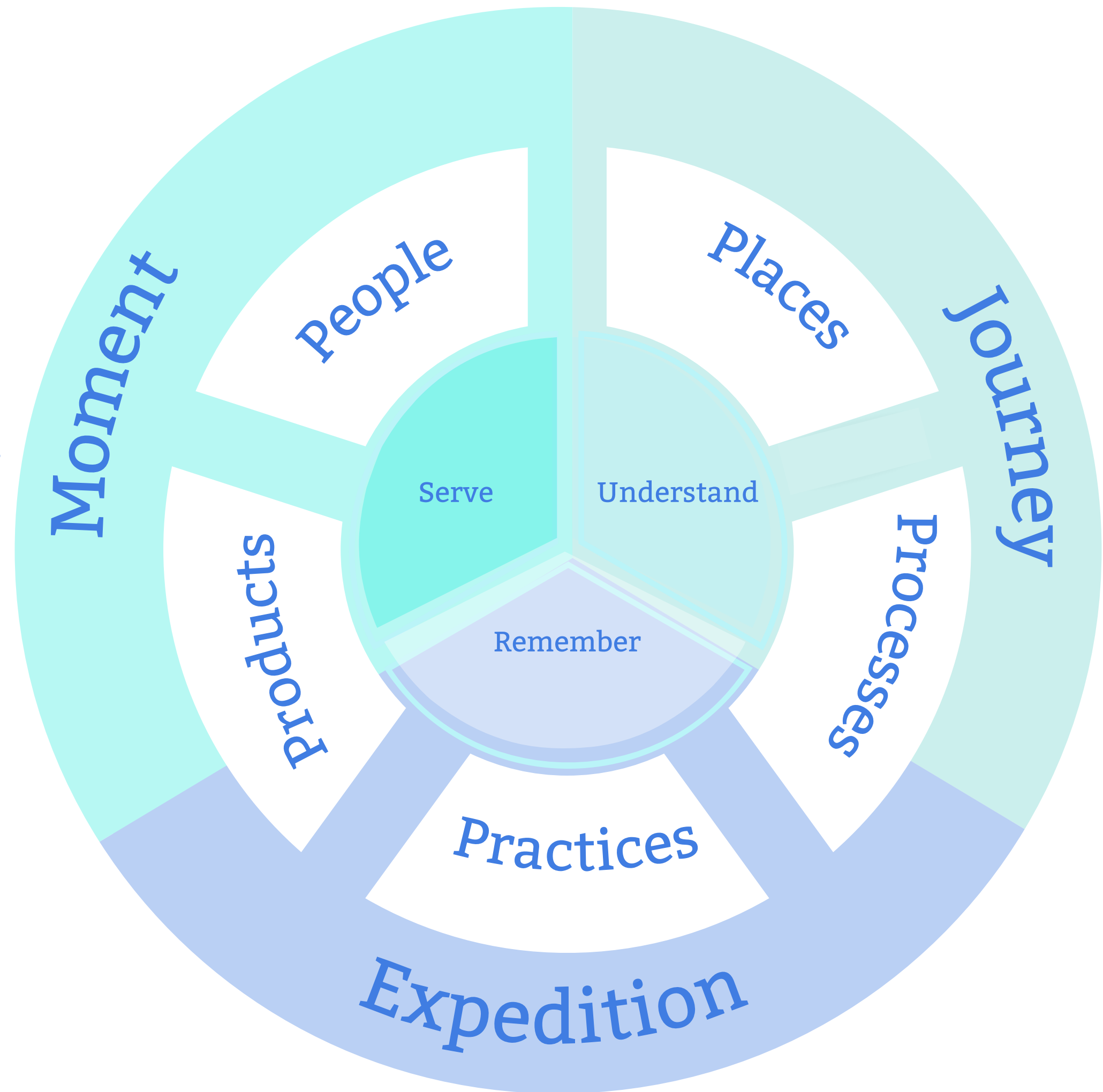
Look and Listen
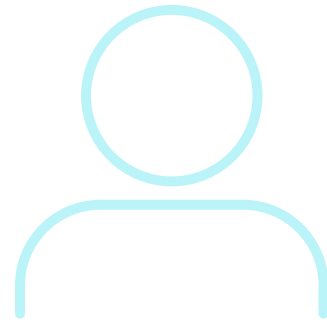
People
Identity
Interests
Funds of knowledge
Wishes and worries
Aspirations
Performance
Growth
Interpretations
Skills
Perseverance
Engagement
Frustration
Strengths

Place
Physical surrounding
Use of light
Use of color
Sound control
Scent
Organization
Displays
Documentation
Norms
Expectations
Supports
Stressors
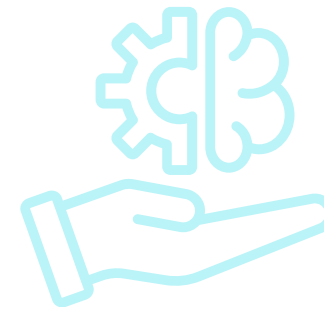
Practice
Need finding
Research
Prototyping
Idea generation
Peer review
Feedback
Revision
Instruction
Self-assessment
Progress monitoring
Editing
Craft moves
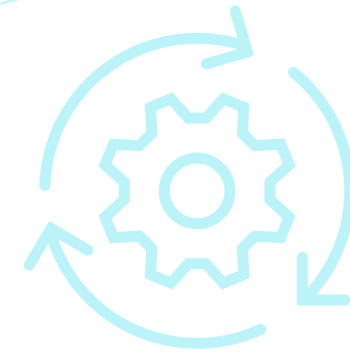
Process
Cognitive processes
Creative processes
Motivating processes
Demotivating
processes
Behavioral learning
processes
Social learning
processes
Collaborative learning
processes
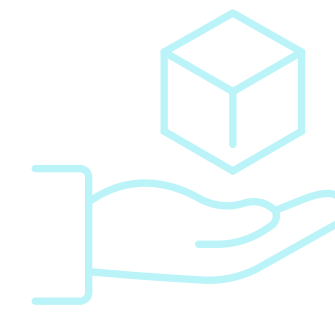
Product
Mastery of learning
Mastery of knowledge
Growth
Shifts in thinking
Shifts in process
Shifts in craft
Collaborative efforts
Reflections
Results of design
thinking
Results of processes
and practices

Wonder

What is the relationship between X and Y?
What does X require of Y?
What does X afford us that Y does not?
What would be gained if we removed X from Y?
How is X tempered by Y?

If you change X, how does it influence Y? How does X enhance Y?
How does X diminish Y? Is X necessary for Y?
Does X align with Y?
When we vary X, how does it affect Y? How do we balance X with Y?
What is the effect of X and Y on Z?

Learning Opportunities, Approaches, and Tools and Platforms to Consider

Focus	Learning Opportunity	Tools and Platforms to Consider	Examples
People	Interviewing people is one of the best ways to learn more about their identities, values, beliefs, and attitudes. It also teaches us much about how they think, their needs and interests, and their interpretations of experiences.	Speech-to-text apps enable us to record the interview in a non-invasive way while producing transcripts that we can easily skim, scan, and interpret.	Microsoft Dictate, Google Docs Voice Typing, Apple Dictation, Windows Speech, Otter.ai, Dragon, and Amazon Transcribe
Places	Photography enables us to capture evidence of the norms, expectations, supports, and stressors in an environment.	Digital photography is efficient and allows us to capture and save images in albums that align to distinct codes.	Google Photos, Apple iCloud, Amazon Prime Photos, Photobucket, Dropbox FlickR.

Electing to use captioning when we video record enables us to code and interpret these data well.

Unrulr, SeeSaw, and Storypark are documentation apps that enable multimedia documentation. |
| Processes or Practices | Video helps us capture cognitive, creative, social, emotional, behavioral, collaborative, motivating, or demotivating processes. It can also allow us to capture design, instructional, and compositional practices. | Video invites learners to capture processes or practices bit-by-bit or across one uninterrupted stretch of time. Storyboards with photos are useful as well but are a bit more disruptive to the learning process because they require learners to stop and snap multiple images. We can set devices to record and left them relatively unattended. | |
| Products | Documenting the products of learning can help us assess and understand mastery. Comparing process works to their related final products can help us understand and assess growth over time. We can also study shifts in thinking and process this way. | Whenever possible, it is helpful to collect the actual artifacts of learning--including its products. Photography is helpful here when the products of learning are static. Video helps us capture more dynamic products. | |

Becoming a Documentarian: A Learning Progression

Beginning	Approaching	Mastering	Evolving
Our plans are typically based upon needs identified by leaders.	Our plans are driven by needs that we and other leaders have identified.	Our plans are driven by needs and interests identified with our subjects in collaboration with leaders.	Our plans shapeshift in response to the needs and interests of our subjects and other community members.
We tend to study the products of learning, rather than the learning process.	We are intentional about studying the process of learning and not merely its products.	We're thoughtful about what constitutes learning and discriminating about what we document relative to it.	We shift between deductive and inductive postures with purpose, as we pursue meaningful questions about learners and learning.
We look and listen for evidence of knowledge and the mastery of skills.	We look and listen for evidence of learning that aligns to specific targets, goals, or purposes.	We capture evidence of learning that aligns to predetermined goals, but we also document and learn from the unexpected.	Learning stories are multimodal, readily shared, accessible to all, and provocative. They inspire deeper and better questioning and documentation work.
We rely on written words, codes, checklists, and scoring tools to capture and reflect upon evidence of learning.	We begin capturing images and videos of what we see and audio recordings of what we hear.	Learning stories are documented and shared multimodally. They're grounded in qualitative and quantitative data.	Our subjects, colleagues, critical friends, and others with diverse perspectives challenge and change our plans, our thinking, our documentation practices and processes, and the theories that emerge from our work.
Data are assumed to be numbers and research is typically defined as quantitative.	Data and research are both qualitative and quantitative.	We invite our subjects, colleagues, critical friends, and others with diverse and necessary perspectives to inform our process and interpret findings.	
Our interpretations of data are guided by a need to study performance and growth relative to competencies and standards that are defined by others.	Our interpretations of the data are inspired by a desire to learn.	These interpretations inform our next steps as documentarians.	
These interpretations are often ours alone.	We invite colleagues and critical friends to interpret our data beside us.		

I love a good swag bag.

I also add free resources to this collection monthly, so please
stay in touch.

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