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One criticism of educational research is few studies examine the sustainability of professional development for teachers. This study grew out of a pilot study conducted in 2005 with a group of teachers who participated in the Shakespeare Lives! professional development program. The purpose of this qualitative collective case study was to determine whether the changes that teachers initially reported in 2005 were sustained three years later, as well as whether these changes were transformative. Data collected in this study were conceptualized through the lens of transformative learning theory. Data sources included: 1) archival data from the 2005 pilot study, 2) quick-writes in which each teacher reflected on a statement he/she made in 2005 about change, 3) artifacts that represented each teacher’s teaching 4) digitally recorded interviews, 5) email responses to interview follow-up questions. Findings indicate that three levels of transformation exist: pedagogical, professional, and personal. All of the teachers experienced pedagogical transformation, four teachers experienced professional transformation, and two teachers experienced personal transformation. Implications for teacher professional development as well as suggestions for further research are discussed.

“THEIR TRANSFORMATIONS WERE NEVER FOR A PIECE OF BEAUTY RARER”: THE TRANSFORMATIVE EFFECTS OF SHAKESPEARE LIVES!, A PROFESSIONAL DEVELOPMENT PROGRAM FOR TEACHERS

by

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Approved by

_____
Committee Chair

To my Sons Thaddeus David Murray and Hunter Norris Murray

Learning is but an adjunct to ourself

And where we are our learning likewise is.

--Shakespeare

APPROVAL PAGE

This dissertation has been approved by the following committee of the Faculty of The Graduate School at The University of North Carolina at Greensboro

Committee Chair _____

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Date of Acceptance by Committee

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Date of Final Oral Examination

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I can no other answer make but thanks and thanks.

--Shakespeare

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CHAPTER I

INTRODUCTION

I think we've all learned something about ourselves. I learned that I can take risks, that I should open myself up more. Although I've felt so ignorant and stupid many times this week, I've discovered that I can have good study habits and be persistent. I don't know if I'll be able to call my lines tomorrow or a month from now. But tonight, during that final performance, in that Great Wooden O, I knew them by heart. I will never look at Hamlet *quite the same way again. "I am ill at these numbers. I have not art to reckon my groans." But tonight, call me nymph.*

These words come from my journal the night I played Ophelia on the Globe stage before an audience of perhaps five. Our performance culminated two-weeks of professional development through the Shakespeare Lives! program and the International Shakespeare's Globe Theatre, London, UK.

As a participant in the Shakespeare Lives! program, I found that the experience empowered, energized, and transformed my teaching of Shakespeare and other literature. Other teachers such as Laurel Johnson (2001) have expressed the same: "The project forever altered my Shakespearean perspective; my time with his spirit changed my life. My plan is to communicate this new passion, connection, inspiration, and dedication to my students, other teachers, and the world" (p. 28). Like Johnson, I also found my experience with Shakespeare Lives! life-changing. In my classroom, I use my "middle note" rather than my loud "teacher voice." I found that students are more attentive

because I speak more authentically. Because I utilized more engaging activities with my students, I developed more authentic relationships with them. In addition to strengthening my intellectual confidence as revealed in my journal excerpt above, I utilized the strategies in my personal life. When I was diagnosed with cancer, I practiced breathing and visualized healing. Because of the powerful changes I experienced as a result of Shakespeare Lives!, I became interested in whether other teachers experienced lasting change as well.

The focus of this study was to explore whether the changes six teachers who participated in the program in 2005 attributed to their Shakespeare Lives! experience was sustained three years later and whether it transformed their teaching.

Background

This study grew out of a pilot study with seven teachers from rural, low-wealth counties in North Carolina who participated in Shakespeare Lives! in 2005. The Shakespeare Lives! Program's purpose is to train teachers in actively engaging their students in Shakespeare's plays. In the words of program associates,

> Shakespeare Lives! is an innovative program created to assist educators in the teaching of Shakespeare through performance-based activities. The program aims to excite students as they learn about Shakespeare by offering to teachers new, engaging lessons that encourage appreciation for the dramas and poems written by the bard. (Shakespeare Lives!)

The question of "how to change the teaching of Shakespeare in English classrooms" guided the program directors at the inception of Shakespeare Lives!. They

developed the answer, “Change the Teacher!” (Malcolm, p. 3). As I continued working with the program as a practitioner, I wanted to understand how Shakespeare Lives! facilitated teacher change. Therefore, I conducted a pilot study with seven teachers who participated in the program in 2005 to explore what “play shop” activities the teachers found meaningful.

During the pilot study, I followed teachers through the program beginning with Camp Shakespeare held at the University of North Carolina School of the Arts, continuing with two weeks’ training at Shakespeare’s International Globe in London, follow-up workshops in the fall, and culminating at a student performance festival in November.

The pilot study revealed that all the teachers changed their teaching of Shakespeare and believed that their students experienced success. Teachers were initially drawn to the Shakespeare Lives! Program because they were seeking ways to connect their students to Shakespeare. The performance strategies proved to be specific to the teachers’ subject content and to their teaching contexts, an important criterion for effective professional development (Bransford, Brown & Cocking, 2000; Darling-Hammond & McLaughlin, 1995; Garet, Porter & Desimone, 2001).

Specifically, teachers described the following changes as a result of the experience:

Pedagogical changes (7 teachers):

- Using bits of text rather than students reading every word of a play.
- Using theater games to help students “physicalize” the text.

- Using elements and archetype workshops to interpret Shakespeare's meaning.
- Involving every student in performing a scene, regardless of academic exceptionalities.

Professional changes (2 teachers):

- Believing that fostering a change in the classroom begins with a change in self.
- Giving some teacher control over to students.

Personal changes (2 teachers)

- Feeling a sense of rejuvenation.
- Finding a balance between "doing and being."

The pilot study findings indicate that the program achieved its goal of changing how teachers teach Shakespeare.

Problem

One criticism of education is dearth of research studying the sustainability of professional development, (Berry, 2005; Larabee, 1998; Levine, 2006; Shulman, 1987; Wilson, Floden, & Ferrini-Mundy, 2002). While some studies document that teachers transform their teaching and that adult learners have experienced perspective transformation as a result of professional development (Gallagher, 1997; Garet, Porter, & Desimone, 2001; Hilliard, 1997; King, 2004; Taylor, 2007), few longitudinal studies exist. Further research into programs that foster transformation is needed to determine the efficacy of strategies that sustain transformation (Bransford, Brown, and Cocking, 2000; Borko 2000, Garet, Porter, & Desimone, 2001; King, 2004; Taylor, 2007). King

(2004) also suggests that further research should explore what transformational learning experiences "mean for [teachers] lives and work years later."

The purpose of this collective case study was to determine whether the changes that teachers initially reported in 2005 were sustained three years later, as well as whether these changes were transformative.

Central Question

In what ways are the changes teachers attributed to Shakespeare Lives! sustained three years after their professional development experience and in what ways are the changes transformative?

Sub questions

1. What pedagogical changes made three years ago do teachers continue to use?
2. What professional changes do the teachers describe?
3. What personal changes do the teachers describe?

Data collected in this study were conceptualized through the lens of transformative learning theory. Transformative adult learning theory grows primarily from Mezirow's work (1990a, 1990b, 1991, 1997). Mezirow (1991) identifies the goal of transformative learning as "to help the individual become a more autonomous thinker by learning to negotiate his or her own values, meanings, and purposes rather than to uncritically act on those of others" (p. 12). Transformation is often triggered by a

"disorienting dilemma" that challenges the learner's assumptions. In order to foster transformative learning experiences, educators need to provide opportunities for learners to reflect critically on their assumptions and experiences. In addition, learners need to engage in dialogue or "communicative learning." In order for transformation to occur, the learner must act (Mezirow, 1991). Professional and personal transformation can occur when learners engage in examining assumptions, changing perspectives, and acting on the change.

Definition of terms

Transformation: Mezirow (1990a) defines transformation as "the process of learning through critical self-reflection, which results in reformulation of a meaning perspective [assumptions] to allow a more inclusive, discriminating, and integrative understanding of one's experience. Learning includes acting on these influences" (p. xvi). Dirkx (2006) believes it is important to examine transformation in terms of how an individual experiences "changes in his sense of self and our being in the world" (p.131).

Sustained: In general, sustainability indicates something that lasts over time. I borrow from Hargreaves and Fink (2006) in the way I view sustained changes and transformations. Teachers sustain changes when they report in 2008 that they continue to "preserve" the strategies that "mattered" to them in 2005.

Pedagogical transformation: *Pedagogical transformation* means the teacher used Shakespeare Lives! strategies, and adapted the strategies to meet students' learning needs or used them in new ways (Shulman, 1987).

Professional transformation: I define *professional transformation* as a change in teaching philosophy as a result of the professional development experience. While pedagogical transformation may imply a professional change, for the purposes of this study, a professional change indicates a consciousness of a change in philosophy or in relationships with students.

Personal transformation: I define *personal transformation* as changes in the way teachers see themselves such as gaining more confidence or seeking a balance between being and doing.

Significance

Because of the dearth of research studying the long-term effects of professional development, ((Berry, 2005; Larabee, 1998; Levine, 2006; Shulman, 1997b; Wilson, Floden, & Ferrini-Mundy, 2002), this study has significance. Internal generalizability (Maxwell, 2005) can provide valuable feedback to the Shakespeare Lives! program, which they can use to seek grant funding. Although the qualitative aspects of this study prevents external generalizability, Shulman (1997b) asserts,

> If we can create and sustain a particular innovation in a real school, we have demonstrated the possibility that it can exist. Once its existence has been demonstrated, we can study its characteristics and the conditions that either foster or inhibit its development (p. 295).

Results from the pilot study indicate innovation, namely teaching Shakespeare through performance, existed in each of the classrooms. King (2004) suggests that researchers ask, "What does it mean for their lives and work one or two years later, for instance?" (p. 172). This question not only gets to the sustainability of the initial changes teachers related, but also at the ways that transformation evolves over time. Transformation means more than compliance to the strategies learned in professional development, however; it involves becoming an "adaptive expert" who transforms knowledge and innovations learned during professional development into teaching practices that fit their students' needs (Darling-Hammond & Baratz-Snowden, 2005). Shakespeare Lives! utilizes practices that are unique to professional development; therefore, this study is designed to offer characteristics that can generally improve professional development. Revisiting these teachers three years later and examining their perceptions and practice can illuminate the associated outcomes from staff development over time, which can add to the currently limited research base. In addition, this study may provide an "analytical generalization" that "generalize[s] a particular set of results to some broader theory" (Yin 2003, p. 37), namely transformational adult learning theory.

Limitations and Assumptions

The context of the trip to London to work at the International Shakespeare's Globe Theatre is powerful. It is not feasible to assume that professional development will take place in such contexts. In addition, this professional development program is specific to middle and high school English and drama teachers. Another limitation of this study is the homogeneity of the individual cases; they each participated in the program together. However, I am operating under the assumption that the Shakespeare Lives! program design fits the criteria for effective professional development and that it has unique components. A final limitation of the study is the data itself; because of time constraints, I was not able to observe the teachers teaching Shakespeare. Therefore, I had to rely on teachers providing specific examples in the interview and artifacts to support their responses.

Summary

Shakespeare Lives! uses strategies recommended for effective professional development as well as for transformative learning (Darling-Hammond & Baratz-Snowden, 2005; Dirkx, 1997, 2001; Dirkx, Mezirow, & Cranton 2006; Feiman-Nemser, 2001; Merriam, Caffarella, & Baumgartner, 2007; Mezirow 1990, 1997; Tolliver & Tisdale, 2006; and Yorks & Kasl, 2006). My pilot study revealed that engaging teachers in authentic experiences, providing opportunities for dialogue and reflection, as well as providing technical support once teachers returned to the classroom gave teachers a deep

understanding of and efficacy in using performance techniques. The meanings teachers found were closely linked to their experiences with students, who were the reason these teachers chose to participate in the program. This collected case study explored the sustainability of the changes teachers attributed to Shakespeare Lives! as well as the extent of teacher transformation three years after the Shakespeare Lives! experience. This study's possible significance is that it may uncover characteristics that may improve professional development. Limitations include the professional development context and the homogeneity of the group participating in the study.

This study is developed into four more chapters. Chapter 2 contains a review of the literature of both teacher professional development and transformative adult learning. Chapter 3 outlines the methods used in participant selection, data collection, and data analysis. Chapter 4 details the results of each individual case or teacher followed by a cross-case analysis. Chapter 5 provides a discussion of the implications of the findings as well as suggestions for future research.

CHAPTER II

REVIEW OF THE LITERATURE

The purpose of this collective case study was to determine whether the changes that teachers initially attributed to the Shakespeare Lives! professional development in 2005 were sustained three years later, as well as whether these changes were transformative. In this chapter, I provide the context of Shakespeare Lives!, a review of the literature in teacher professional development, an overview of transformative adult learning theory, and a comparison of professional development theory and transformative adult learning theory.

The following considerations were used in determining the literature included in this review. First, I turned to experts who are well-known in the fields of education and transformative adult learning as indicated by the quantity of their published works as well as references to their work in others' studies. All references have been peer-reviewed. This literature review consists of three sections. The first section provides the context for this study. The next section outlines the goals of professional development, problems with traditional professional development for teachers, and alternatives to traditional professional development. In addition, characteristics of effective professional development based on research, as well as opportunities for further research, are highlighted for the purposes of situating this study in a professional development context

as well as for examining how the Shakespeare Lives! program fits within this context. The final section provides the theoretical lens for examining the data from this study.

Transformative adult learning theory, first proposed by Mezirow (1991), has evolved in the last decade based on research conducted by Dirkx (1997, 2001, 2006), Cranton (1994, 2002), and others. Elements of learning conducive to transformation overlap with characteristics of effective professional development.

Context

Shakespeare Lives!, a professional development program for English and drama teachers, began in 1999 as a joint project between the University of North Carolina School of the Arts and the International Shakespeare's Globe, London, UK. Initially, English and drama teachers from elementary, middle, and high school could apply to the program. The application process included two letters of recommendation, an essay detailing expressing reasons for entering the program, and an interview. In 2005, the grant from the National Endowment for the Humanities specified that teachers must come from low-wealth counties. Therefore, curriculum specialists and principals from specified counties received the information about the program and selected the teacher participants.

This program fits into the category of summer institute because most of the intensive training takes place during the summer months. In June, teachers spend three days at Camp Shakespeare studying under faculty at UNCSA and under a Globe practitioner. The work at camp prepares teachers for two weeks training at the

International Shakespeare's Globe Theatre in London, UK during July. Once teachers return from London, they participate in monthly follow-up workshops beginning in August through October. In addition, Robert Moyer, the program's curator and a Shakespeare Lives! mentor visit each teacher's classroom and conducts workshops from late October and early November.

The purpose of the Shakespeare Lives! program is to help teachers bring Shakespeare "off the page and onto the stage" through the use of performance techniques. One unique aspect of this program is that teachers learn along with students at Camp Shakespeare located at the University of North Carolina School of the Arts. During the 3-day camp, teachers bring two or three of their students and participate as co-learners in drama, voice, movement, and text workshops. The rationale for this format is that teachers can immediately see how students will engage with the strategies.

Context for learning in this program is powerful. The work at Camp Shakespeare lays the foundation for a two-week emersion into the life of the International Shakespeare's Globe Theatre in London. Shakespeare Lives! and Globe Education emphasize the importance of experience; therefore, the program provides a recorder who documents every workshop and reflection session so that teachers will not be distracted by taking notes, but can fully feel and absorb the experience. Teachers participate in workshops that model performance-based teaching. Directors lead analysis of text just as they do with actors. The masters of voice and movement move teachers through the same exercises as they do with the companies. In 2005, teachers found these workshops to be the most meaningful of their experience. Rehearsals are constructivist in nature;

directors use ideas from the teachers to block the scene all while considering the uniqueness of the Globe's space. During the first week, this work leads to teachers performing a scene on the Globe stage just as the bells of St. Paul's announce midnight. The performance is followed by a champagne toast. (bringing together the four A's of the Globe: architecture, actor, audience, and alcohol). These activities are authentic in that they "are similar to what actual practitioners do" (Putnam & Borko, 2000. p. 4). During the second week, the program provides "opportunities for teacher learning [that] are situated in the tasks of teaching—planning, enacting instruction, assessing student understanding, [and] in reflecting on teaching…." (Feiman-Nemser, 2001). Teachers travel to see a culminating performance at Gosden House, a residential school outside of London for children from ages six through eighteen who have Down's Syndrome or autism. In 2005, each class performed a scene from *Hamlet* with music and costumes created by the children. One child, whose doctor said she would probably never speak, said her line clearly. The joy of accomplishment beamed on every child's face. This experience illustrates the principle that any and all people can perform Shakespeare.

In addition to seeing the results of teaching Shakespeare through performance, teachers work with Globe educators to plan a workshop learning experience for students. Using strategies they learned during the week combined with their own knowledge and expertise, teachers develop a learning activity in pairs and then enact it with students from London schools. The workshop is followed by a reflection and feedback session led by Globe educators.

Reflection is deeply embedded in the Shakespeare Lives program. At the first meeting at camp Shakespeare, teachers are provided with a journal to record their thoughts, experiences and reflections privately. At the end of each day, Bob Moyer, the curator, leads a reflective dialogue with questions such as What do you know? How do you know it? These questions are similar to those Shulman (1986) suggests we ask in trying to pinpoint teacher knowledge. Moyer's purpose is to identify what teachers understand as well as what is meaningful and exciting to them. In addition to the dialogue reflections, teachers complete written reflections with sentence starters such as I feel…, I know…., I want…, I need…. Moyer uses these responses to adjust program activities to suit the needs of the teachers.

Once teachers return to their classrooms, the professional development continues. Teachers bring students to the University of North Carolina School of the Arts once again for follow-up workshops. Each teacher takes a scene from the play studied at the Globe, cuts it, and prepares a performance with his/her students. During the rehearsal phase, a mentor teacher from the program and Bob Moyer visit the classes to provide support. In November, the classes converge at UNCSA for a festival where they perform for each other finished by accolades from Patrick Spottiswoode, Director of Globe Education, pizza, soda, and a cake bearing Shakespeare's likeness.

Shakespeare Lives! has worked to document program successes. In 2006, the program produced a legacy document outlining its history and its components along with testimonials from teachers and students. The document also contains results of an Internet survey: 97% of teachers agreed that their experience in the program positively

impacted their classroom, and 91% agreed that their students demonstrated enjoyment and understanding of Shakespeare's works (Malcolm, 2007). In addition, the program found that some teachers adapted the performance strategies to other works of literature such as Miller's *The Crucible* and to the Anglo-Saxon epic *Beowulf.* Some teachers also noted "seeing quick results with their students by considering literature as being malleable to the immediate needs and interests of [their] students" (Malcolm, 2007, p. 10). While this document is useful in highlighting the history of the program and communicating its successes, it lacks the standards of educational research as recommended by AERA:

> teacher education [should] adopt a set of research standards that are fundamental to scholarship in most other fields: situating research in relevant theoretical frameworks, employing clear and consistent definition of terms, providing full descriptions of research design and methods, developing reliable measures in specific areas, engaging in mixed method and multidisciplinary studies, adopting experimental research designs to study particular subjects, and focusing on the impact of teacher education on student and teacher learning (Levine, 2006, p. 52).

Shakespeare Lives! utilizes unique elements in professional development. By immersing teachers into the workings of the Globe Theatre, teachers become "newly aware of being a student rather than instructor" (Malcolm, 2007. p. 10). Teachers engage in workshops similar to those of the Globe's actors and perform a scene on the Globe stage. Teachers then prepare a workshop for a group of London students:

> Of special not is the use of "workshop" rather than "lesson plan" as the teacher prepares for the students—a change that speaks to the alteration the participants need to experience for a successful instructional shift: a learning laboratory

> intentionally removed from their classrooms while honing their already strong teaching skills (Malcolm, 2007, p. 8).

Shakespeare Lives! builds on the expertise that teachers bring to the table rather than operating from a deficit model (Feiman-Nemser 2001). Once teachers return from London, teacher learning does not stop. As they prepare for a festival, teachers once again bring students to UNCSA to work together. Moyer, the program's curator and mentor teachers also conduct workshops in the teachers' classrooms. The festival that brings teachers and students together to perform scenes for each other "is the ultimate authentic learning experience—the proud payoff for students teachers, parents, and principals" (Malcolm, 2007, p. 11).

Teacher Professional Development

Shakespeare Lives! embeds many of the characteristics of effective professional development: new ways of approaching subject matter, context away from school, and deep reflection (Putnam and Borko, 2000). This section provides a review of the goals of teacher professional development, the problems with effective development, the characteristics of effective professional development, and the need for future research.

Goals of Professional Development

Feiman-Nemser (2001) writes that "professional development means transformations in teachers' knowledge, understanding, skills, and commitments, in what they know and what they are able to do in their individual practice as well as in their shared responsibilities" (p. 1038). The word *transform* suggests a change into something

different. In order to "transform teachers' knowledge, understanding, and skills," education experts agree that one goal of professional development is to help teachers become "adaptive experts" (Darling-Hammond & Baratz-Snowden, 2005; Duffy & Kear, 2007; Hammerness et. al., 2005). Adaptive teachers do not parrot the instruction of professional developers, but rather transform knowledge and innovations learned during professional development into teaching practices that fit their students' needs.

Perhaps the most important goal of professional development is to improve student learning in powerful and engaging ways (Darling-Hammond & McLaughlin, 1995; Lieberman, 1995). Adaptive teachers understand how their students learn. They align strategies to bring together students and content and make necessary adjustments in a timely manner. Schön (1987) calls this "professional artistry" (p. 22). Duffy (2002) describes this type of teaching as "'entrepreneurial' because the best teachers spontaneously capitalize on opportunities despite the risk" (p. 335). Since teachers possess a repertoire of skills, they also possess the confidence to take risks in their teaching.

In order to meet students' needs, professional development must also meet teachers' needs. McDaniel (1999) believes that professional development should also be personal development to help teachers develop their "inner teacher." The inner teacher is the source of purpose, values, and mission. At its core is human spirit. Duffy (2002) recognizes that teachers must look within to find their vision for teaching. He advocates assigning pre-service teachers to write vision papers that they revisit and revise as they learn new methods:

> The intent . . .is to develop teachers who claim the right to make their own decisions consistent with their personal, moral commitment to kids and teaching. A teacher's passion for a personal mission governs decision-making, not a teacher educator's passion for a particular theory, method, or program (p. 334).

Duffy found that his students used their vision statements to guide their decision-making once they entered the classroom. Tapping into their "inner teacher" enhances teachers' independent and creative thinking. It also helps them to honor the "inner" worlds of their students.

Professional development goals extend beyond individual teachers' classrooms. Feiman-Nemser (2001) and Lieberman (1995) assert that professional development should lead to school improvement. This calls for teachers and administrators working collaboratively to solve problems that they face such as improving student achievement, working with children of poverty, or closing the achievement gap. Lieberman (1995) maintains "to solve problems collectively, is more than a question of inserting a new curriculum or a new program." Instead, teachers engage in an "active pursuit" of ways to involve students in experiential learning. In this type of professional development, teachers take charge of their learning by identifying problems, seeking solutions, and working collaboratively to implement the solutions. This looks very different from traditional professional development in which teachers take a passive role.

Problems with Traditional Professional Development

Reminiscent of college lecture halls, where students gather with pens and notebooks, every teacher has experienced typical professional development which involved sitting in a library, cafeteria, or classroom, attending (or not) to an "expert" sharing the latest strategy or innovation to improve test scores. Provided with little opportunity for discussion or collaboration, teachers return to their classrooms charged to implement the latest strategy in isolation.

This type of professional development is similar to what Friere (2005, 1970) calls "banking education":

> Education thus becomes an act of depositing, in which the students are the depositories and the teacher is the depositor. Instead of communicating, the teacher issues communiqués and makes deposits which the students patiently receive, memorize and repeat. This is the "banking" concept of education, in which the scope of action allowed to the students extends only as far as receiving, filing and storing deposits. They do, it is true, have the opportunity to become collectors or cataloguers of things they store. But in the last analysis, it is the people themselves who are filed away through the lack of creativity, transformation, and knowledge in this (at best) misguided system. For apart from inquiry, apart from the praxis, individuals cannot be truly human (p. 72).

Indeed, the intent of some professional development programs is to take away teachers' adaptive expertise by demanding complete fidelity to its content and strategies. Shapiro (2006) references Michael Apple who calls this type of program "teacher proof curriculum," which takes away teachers' creativity and intellectual engagement and "turn[s them] into clerks who are expected to teach by robotically following instructions" (Shapiro, 2006, p. 113). Instead of developing what Emerson (1837) calls "Man

Thinking;" that is, people who take the ideas of others and use them for inspiration for their own creativity, teachers create "parrots of other men's thinking."

Banking professional development turns into banking education for our students during which neither the teacher nor the students engage in meaningful learning. Hammerness et. al. (2005) refer to this as the problem of "apprenticeship of observation." This simply means that teachers teach as they are taught. It stands to reason that teachers will emulate their teachers. Not only does this mean that teachers may practice pedagogy that doesn't lead to student learning, it also hinders adaptation. Duffy (2002) discovered that his students referred to their pedagogies as "Duffy's methods" and realized that they were "followers." He warns:

> To the extent that literacy educators emphasize their own pedagogical preferences, and do not teach our teachers to claim the right to their own visions, we run the risk of developing followers - teachers who lack the psychological strength to adapt and modify instruction in pursuit of complex forms of literacy. We run that risk when teacher education is based in a technical-rational model, or in a particular ideology or program, or in the charisma of a particular mentor, or in a reverence for research (p. 335).

Even if teachers work with methodologies that are theoretically sound, they will not find success if they cannot adapt to meet students' learning needs.

Another problem with traditional professional development is that all too often, the strategies are generic rather than specific to subject content or teaching context (Bransford, Brown, and Cocking, 2000; Feiman-Nemser, 2001). Teachers are interested in improving learning in their teaching contexts; yet only two-thirds of teachers report that they have a voice in selecting professional development opportunities (Bransford,

Brown, and Cocking, 2000). Combined with few opportunities for interaction and no follow-up support, it is little wonder that traditional professional development produces little transformation of teaching practice (Hilliard, 1997; Feiman-Nemser 2001; Putnam & Borko, 2000).

Perhaps the biggest criticism of traditional professional development is the tendency to operate from a deficit model rather than capitalizing on the expertise of teachers (Feiman-Nemser, 2001). A deficit model assumes that the teachers lack information and skills to be successful in the classroom.

> Teachers have been told often enough (or it has been taken for granted) that other people's understandings of teaching and learning are more important than their own and that their knowledge--gained from the dailiness of work with students--is of far less value. Outside experts have often viewed teaching as technical, learning as packaged, and teachers as passive recipients of the findings of "objective research." (Lieberman, 1995).

Not only are teachers made to feel that experts know more about teaching and learning, they experience difficulty articulating what they know and how they know it (Shulman, 1997). Teachers' knowledge and skills are revealed through their practice, what Schön (1987) calls "knowledge-in-action." Shulman (1997) "strive[s] to mine the 'wisdom of practice'" (p. 506) of teachers who experiment, take risks and reflect on their teaching. Both Schön and Shulman recognize that teachers' practice can be a valuable source for professional development.

Characteristics of Effective Professional Development

Fortunately, teachers can find alternatives to traditional professional development that show promise in transforming teaching. "We must rethink professional development—not as a way to fill teachers' heads with new and innovative ideas that may come and go, but rather as an approach that builds on teachers' professionalism and encourages their intellectual activity" (Nieto, 2003). Teachers become intellectually engaged through action research that focuses on a problem connected to their students' learning and through collaborative colleagues. Professional development offered through professional networks such as the National Council for Teachers of English as well as completing the National Board Certification process provide opportunities for teachers to reflect on their content and practice (NCSD).

Effective professional development is grounded in sound research in learning theory, curriculum design, and assessment practices (Corcoran, 1995). In a review of professional development studies, Hilliard (1997) reveals, "In each case, they had evolved a theory to fit their successful practice, which was expressed explicitly in most cases and implicitly in others." Inquiry-driven professional development can lead to new theories of learning.

Strategies that specifically connect to teachers' subjects and contexts prove more beneficial than "generic" strategies (Bransford, Brown, & Cocking, 2000; Darling-

Hammond & McLaughlin, 1995). Shulman (1986) defines content knowledge in three categories:

> a) Subject matter--refers to the amount and organization of knowledge per se in the mind of the teacher. . . . The teacher need not only understand *that* something is so; the teacher must further understand *why* it is so, on what grounds its warrant can be asserted, and under what circumstances or belief in its justification can be weakened and even denied.
> b) pedagogical . . . includes an understanding of what makes the learning of specific topics easy or difficult...teachers need knowledge of the strategies most likely to be fruitful in reorganizing the understanding of learners.
> c) curricular . . . knowledge of materials available and how his/her curriculum relates to others. (pp. 9-10).

Subject matter, pedagogy, and curriculum—teachers need to use all three in concert to maximize student learning. Garet, Porter and Desimone (2001) assert that professional development that focuses on subject content strategies is "an especially important element in changing teacher practice" (p. 924). This is especially true when the staff developer is a master teacher with classroom experience (Hilliard, 1997). Experience with the strategies gives the developer credibility for teachers. In this context, teacher learning becomes authentic because workshop experiences "are similar to what actual practitioners do" (Putnam & Borko, 2000, p. 4).

"Actual practitioners" work with students at the center of their teaching. According to Darling-Hammond and MacLaughlin (1995), professional development "must be connected to and derived from teachers' work with their students." Furthermore, Darling-Hammond and MacLaughlin suggest that during workshops, teachers must experience learning-centered strategies in order to "deeply understand" their classroom use. Teachers who focus on student learning often are proactive in

seeking out professional development. Duffy and Kear (2007) advocate that professional developers encourage teachers to utilize their vision for students in order to "deal with complex instructional problems" (p. 580). Finally, Bransford, Brown, and Cocking (2000) recommend that teachers are not only encouraged, but supported in implementing new strategies with students.

Professional development that provides technical support over time is more effective than the "one shot" workshops (Duffy & Kear, 2007; Feiman-Nemser, 2001; Garet, Porter & Desimone 2001; Hilliard, 1997). Support can take the form of coaching during which teachers implement learning with minimal risk (Schön, 1987). Coaching can ensure mastery in implementation (Corcoran, 1995) because teachers "learn *about* practice *in* practice" (Darling-Hammond & Baratz-Snowden, 2005, p. 36). Teachers can also support each other by forming learning communities in which they reflect on their teaching and solve problems that arise with implementation (Bransford, Brown & Cocking, 2000; Darling-Hammond & MacLaughlin, 1995).

Teachers' engagement in collaboration and in dialogue is critical for implementing professional development (Hammerness, *et. al.*., 2005; Shulman, 1997). Dialogue during professional development and implementation deepens understanding and provides authenticity for teacher participants (Shulman, 1997).

> Professional development takes place through serious, ongoing conversation. The conversation occurs in communities of practice. It focuses on the particulars of teaching, learning, subject matter, and students. By engaging in professional discourse with like-minded colleagues grounded in the content and tasks of teaching and learning, teachers can deepen knowledge of subject matter and

> curriculum, refine their instructional repertoires, hone their inquiry skills, and become critical colleagues (Feiman-Nemser, 2001, p. 1042).

Feiman-Nemser continues that "professional discourse" involves teachers talking about their practice, looking at student work, and investigating possibilities. These conversations can lead to improved teaching and learning.

Dialogue aids teachers in constructing meaning from professional development. According to Corcoran (1995), constructivist activities engage teachers intellectually, socially, and emotionally with content and with each other.

> Constructivists hold to the philosophical position that truth and reality are constructed by the human perceiver or the knower, that objective reality does not exist as a separate external phenomenon, that teaching and learning are always a matter of connecting internal ideas/perceptions/values with the world outside, and that education is ultimately a matter of creating and interpreting human experience (Scheurman, 1998 in McDaniel 1999).

Professional developers allow teachers to construct understanding by immersing teachers in the strategies that will be implemented with students. "This kind of learning enables teachers to make the leap from theory to accomplished practice" (Darling-Hammond & MacLaughlin, 1995). When teachers develop a deep understanding of new learning, they can adapt it to fit the needs of their classrooms (Duffy & Kear, 2007).

Shulman (1997) argues that teachers "They cannot become better teachers through activity and experimentation alone" (p. 514). Hilliard (1997) found that effective professional developers built into their programs time for "deep reflection." Teachers should reflect on both the content and the learning process (Darling-Hammond &

MacLaughlin, 1995). The practice of reflection helps teachers become what Schön (1987) calls "reflective practitioners." Reflective practitioners reflect in the act of teaching; they are able to assess a situation and make quick instructional adjustments to enhance student learning.

The final quality of effective professional development is coherence. "To be successful, staff development must focus on the context that teachers teach and the methods they use to teach content, and it must be sufficiently sustained and linked to daily classroom practice to affect student learning" (Sparks, 2000, p. x). Corcoran (1995) asserts that professional development should grow out of site-based and district initiatives, and Darling-Hammond and MacLaughlin (1995) argue that it should connect to school change. A coherent program connects content, teaching context, and school improvement goals.

Because Shakespeare's works remain in the high school canon, Shakespeare Lives! connects to English and drama teachers' subject and teaching context (Bransford, Brown, & Cocking, 2000; Darling-Hammond & McLaughlin, 1995). Both at UNCSA and at the International Globe Theatre, teachers are immersed in learner-centered strategies that their students will experience (Darling-Hammond & MacLaughlin, 1995). Dialogue is paired with reflection after each workshop session where teachers share discoveries and connections that they make. Teachers are also provided with a journal to record their experiences (Darling-Hammond & MacLaughlin, 1995; Hilliard, 1997; and Schön, 1987). Once teachers return to the classroom, they are provided multiple means of support including follow-up meetings and workshops at UNCSA as well as classroom

visits from the program's curator and mentors (Corcoran, 1995; Darling-Hammond & Baratz-Snowden, 2005; Duffy & Kear, 2007; Feiman-Nemser, 2001; Garet, Porter & Desimone, 2001; Hilliard, 1997). In addition to these research-based elements of professional development, Shakespeare Lives! utilizes other strategies that are potentially effective as well, namely workshops where teachers engage in somatic learning, workshops where students and teachers participate and learn together, and a culminating festival where students perform scenes from a selected play for each other.

Future Professional Development Research

While much has been written on the characteristics of teachers' professional development, "surprisingly little attention has been given to what teachers actually learn in professional development activities" (Garet, Porter, & Desimone, 2001). Putnam and Borko (2000) find that "summer workshops appear to be particularly powerful settings for teachers to develop new relationships to subject matter and new insights about individual students' learning" (p. 7), and they call for more research in this area to understand why this is the case. Bransford, Brown, and Cocking (2000) recommend that research is needed to understand the efficacy of professional development activities such as summer institutes as well as to "advance the knowledge" of curricula and instructional techniques that are effective in improving learning.

Summary of Teacher Professional Development

The goal of professional development is to "transform teachers' knowledge, understanding and skills" (Feiman-Nemser, 2001) and to become "adaptive experts" (Darling-Hammond & Baratz-Snowden, 2005; Duffy & Kear, 2007; Hammerness et. al., 2005). Problems with professional development include lack of interaction and collaboration, disconnect between the professional development and teaching contexts, utilizing a "deficit model," and lack of support (Bransford, Brown and Cocking, 2000; Feiman-Nemser, 2001; Hilliard, 1997; Putnam & Borko, 2000). Effective professional development incorporates sound research (Corcoran, 1995), connects to teachers' teaching contexts (Bransford, Brown, & Cocking, 2000; Darling-Hammond & MacLaughlin, 1995), provides implementation support (Feiman-Nemser, 2001; Garet, Porter & Desimone, 2001; Hilliard, 1997), provides opportunities for dialogue and reflection (Hammerness *et. al.*, 2005, Shulman, 1997), and immerses teachers in strategies they will use with students (Darling-Hammond & MacLaughlin, 1995). Further research in the efficacy of summer institute settings is needed (Bransford, Brown, & Cocking (2000).

Transformative Adult Learning

Characteristics of effective professional development have much in common with teaching for transformation. Participants' engagement in dialogue with each other and

with practitioners, in critical reflection, and in technical support during implementation of practice can lead to perspective transformation. Much of transformative learning theory is based on the work of Mezirow (1990a, 1990b, 1991, 1997). Mezirow's theory has been expanded from a rational, cognitive theory to include embodied, spiritual learning as well (Dirkx, 1997; Dirkx, Mezirow & Cranton, 2006; Dirkx, 2001; Tisdale & Tolliver, 2001; Tolliver & Tisdale, 2006). This section provides an explanation of Mezirow's theory, changes in Mezirow's theory to include somatic and spiritual transformation, effective strategies to teach for transformation, and suggestions for further research in this area.

Mezirow's Theory of Transformative Adult Learning

Mezirow (1997) identifies the goal of transformative learning as, "to help the individual become a more autonomous thinker by learning to negotiate his or her own values, meanings and purposes rather than to uncritically act on those of others." (p. 12). Mezirow (1990a, 1990b, 1991, 1997) asserts that our beliefs are based on our assumptions, which provide a lens through which we view and interpret our worlds.

> [Assumptions] selectively shape and delimit expectations, perceptions, cognition, and feelings. They set our "line of action." Once set, we automatically move from one specific activity (mental or behavioral) to another. We have a strong tendency to reject ideas that fail to fit our preconceptions, labeling those ideas as unworthy of consideration--aberrations, nonsense, irrelevant, weird, or mistaken (Mezirow, 1997).

Assumptions are based on life experiences and are also influenced by society, family, friends, and workplace. For example, teachers may teach the way that they were taught, emulating influential teachers from their own schooling. Also common, teachers teach using their preferred learning style; for example, auditory learners will use lecture, and kinesthetic learners will use hands-on activities. (Cranton & King, 2003).

In order for transformative learning to occur, assumptions must be challenged and examined. Often this challenge comes in the form of a "disorienting dilemma" (Mezirow 1991). Disorienting dilemmas often occur in life such as divorce, a serious diagnosis or loss of a job. The learner experiences something that does not match with her meaning perspective. Often this creates discomfort because the dilemma challenges her belief

system. The process is constructive in that the learners make meaning through interpreting information, context, and experience. The learning events are not as important as "how [participants] interpret, and explain what happens to them that determines their actions, their hopes, their contentment, and emotional well-being, and their performance" (Mezirow, 1991, p. xiii).

A "disorienting dilemma" does not necessarily lead to a transformed perspective. The learner must engage in critical reflection. Mezirow (1990a) defines critical reflection as "assessment of the validity of the *presuppositions* of one's meaning perspectives, and examination of one's own meaning perspective." Mezirow (1990b) also writes, "Reflective interpretation is the process of correcting distortions in our reasoning and attitudes" (p. 7). Mezirow identifies three types of reflection: content, process, and premise. When reflecting on content, the learner focuses on knowledge. Process reflection concerns how learning happened. Premise reflection focuses more on why learning takes place and is related to beliefs about learning. In a review of recent research on transformative learning, Taylor (2007) summarizes Kreber's (2004) study of teachers' reflective process. Kreber found that teachers engaged in content and process reflection more than premise reflection, which is necessary for transformation. Kreber also found a correlation between teaching experience and premise reflection; therefore, she recommends fostering premise reflection in professional development. In another study, King (2004) followed 58 educators through a professional development coursework. Thirty-six claimed to experience perspective transformation in a class or throughout their program of study, which they attributed, in part, to "reflective practice,

critical evaluation, and contemplation" (King, 2004, p. 165). King arrives at a similar conclusion as Kreber: professional development needs to build in opportunities for teachers to identify and question assumptions. Cranton and King (2003) argue that reflecting on what, how, and why we teach "is the heart of transformative learning" (p. 31).

Critical reflection moves learners from "instrumental learning" (problem-solving or procedural) to what Mezirow (1991, 1997) calls "communicative learning," which "involves at least two persons striving to reach an understanding of the meaning of an interpretation or the justification for a belief. Ideally, communicative learning involves reaching a consensus" (Mezirow 1997). Mezirow's view echoes Friere's (1970, 2005). According to Friere, dialogue and critical thinking are cyclical; you cannot have one without the other. He writes, "Without dialogue there is no communication, and without communication there can be no true education" (pp. 92-93). Dialogue is inherent in being human; Mezirow (1990b) calls it "a basic human right" (p. 11). When adults are involved in communicative learning, they explore why they teach and why their profession is important. If the learners share their authentic selves, they come to understand each other better, an ingredient necessary for effective teaching (Cranton & King, 2003). Palmer (1993) asserts that through dialogue we not only come to a better understanding of others, but "our own speech becomes clearer and more honest; through the other we learn much about ourselves (p. 101). Communicative learning takes time, thus, professional development typically involves instrumental learning, or learning that involves content and procedures (Mezirow, 1990b). Taylor (2007) argues that

instrumental and communicative learning must work in concert to improve teaching and learning.

Although critical reflection and dialogue may lead to an examination of assumptions, learning is not transformative unless it engages learners in what Friere (1970, 2005) calls *praxis*, which is critical reflection and action working together. Friere writes, "...there is no transformation without action" (p. 87). Mezirow (1991) echoes Friere in outlining transformative adult learning theory: "Action in transformation theory is not only a behavior, the effect of a cause, but rather 'praxis,' the creative implementation of a purpose" (p. 12). Learning for transformation involves planning for action or implementation of learning, trying out new learning, building confidence, and "reintegration into one's life on the basis of conditions dictated by one's new perspective" (Mezirow 1991, p. 169). Transformation is marked by a change in meaning perspective and by action that grows out of the new perspective.

Change in Mezirow's theory

As more researchers explore Mezirow's theory of transformative adult learning, it expands to include more perspectives (Cranton, 2002). Mezirow' theory involves the metacognitive analysis of assumptions as well as the process of new learning (Mezirow, 1991; Dirkx, Mezirow, Cranton, 2006). However, others argue that transformation also involves the body as well as the soul (Dirkx, 1997, 2001; Dirkx, Mezirow, & Cranton, 2006; Merriam, Caffarella, & Baumgartner, 2007; Tolliver & Tisdale, 2006; and Yorks & Kasl, 2006).

Somatic learning is embodied learning, or learning that takes place through the senses, the emotions, and the body. Yorks and Kasl (2006) refer to this type of learning as "expressive ways of knowing," meaning “people's intuitive grasp of what they perceive through images, body sensations, and imagination” (p. 43). Often overlooked in favor of rational learning, somatic learning involves the body as well as the mind, and is often expressed through music, art, theatre, and dance. Merriam, Caffarella, and Baumgartner (2007) argue that “Attending to these noncognitive dimensions of knowing can bring better understanding to our lives. They enable us to make meaning of our everyday experiences.” Memory is connected to sensations: emotions, smells, movement, and when adults engage in somatic learning, the learning has potential to be transformative (Tolliver & Tidsdale, 2006). Master of Movement for the Globe Theatre, Glynn Macdonald teaches and has written about Alexander Technique. Macdonald (2002) believes that “the division of the mind and body is absolutely false” (p. 138). Consequently, in her workshops with both Globe actors and with teachers, she unites the mind and the body through elements and archetype exercises (Macdonald, 2004). Macdonald’s colleague, Master of Voice Stewart Pearce (2005) also sees the connection with mind, body, and spirit: “The voice is located in the larynx, which sits in the neck, symbolising a passageway between head and heart and a conduit between mind and body” (p. 13). In his work with actors, business people, and teachers, Pearce seeks to help them find their “signature note,” which is “the sound that sits at the core of our physical body and, therefore, reflects who we truly and completely are” (p. 52).

According to Merriam, Caffarella, and Baumgartner (2007), somatic learning is closely connected to spiritual learning. They along with Brown (2005), Dirkx (1997), Palmer (1993), and Tisdale and Tolliver (2001) assert that adult learning should attend to the spirit or soul as well as the mind. Palmer (2003) defines *spirit* in this way: "Spirituality is the eternal human yearning to be connected to something larger than our own egos" (p. 377). Dirkx (1997), who uses the word *soul* rather than *spirit*, also sees the need for connection:

> It is easier to see what is meant by soul through examples of common experiences than through a specific definition. Being awestruck by a brilliant sunset, captured by the majestic beauty of a rising full moon, or gripped by the immense pain and helplessness we feel for a child trapped deep inside an abandoned well are experiences of soul. . . . Soul beckons to a relationship between the individual and his or her broader world. Our emotions and feelings are a kind of language for helping us learn about these relationships. Viewing our experiences through soul draws our attention to the quality of experiencing life and ourselves, to matters of depth, values, relatedness, and heart. Soul has to do with authenticity, connection between heart and mind, mind and emotion, the dark as well as the light. When we are attending to matters of soul, we are seeking to live deeply, to focus on the concreteness of the here-and-now (pp. 81-82).

Similar to Dirkx and Palmer, Tisdale and Tolliver (2003, 2006) also see spirituality as a desire for connection and authenticity. They add that spirituality is a belief in a higher being, a means of meaning-making, and a source of creativity.

The educators mentioned above argue that matters of the spirit and soul are often missing in the curricula of adult education. Instead, adult educators cater to content and cognitive development. Dirkx (1997) believes this happens because in our culture, we value the rational and scientific in education and dismiss the spiritual as "new age." Teaching for the soul or spirit involves recognizing that adults bring with them "inner

worlds" that influence how they learn. Adult educators must honor the inner landscapes of their students. Instructors are often ill-prepared to teach with soul because it uncovers strong emotions and requires a revelation of the authentic self (Tolliver & Tisdale, 2006). In addition, teaching that engages the spirit can become a messy business because it calls for less structure that is also more student than teacher-driven (Dirkx, 2001). Merriam, Caffarella, and Baumgartner (2007) argue that "An overly programmed, information dissemination-driven classroom leaves no space for significant, indeed, spiritual learning to occur" (p. 205). The result of this type of instruction can have devastating consequences as Palmer (2003) observes:

> I have seen the price we pay for a system of education so fearful of soulful things that it fails to address the real issue of our lives, dispensing data at the expense of meaning, facts at the expense of wisdom. The price is a schooling that alienates and dulls us, that graduates people who have had no mentoring in the questions that both vex and enliven the human spirit, people who are spiritually empty at best and spiritually toxic at worst (p. 379).

Clearly, Palmer calls for a change in how we prepare teachers; one cannot transform teaching without "transform[ing] the heart of teachers" (p. 107). Palmer also asserts that institutions, which reflect "what goes on in the human heart" (p. 107), cannot be changed unless we change the training of teachers.

Closely interwoven with the spiritual domain is the affective, or emotional domain. Hargreaves (1998) notes that the role of emotion is virtually absent in educational research. He also believes that ignoring the role of emotion in favor of more "cerebral" topics such as strategic planning, cognitive leadership and standards-based

reform can lead to teacher burnout. Dirkx (2001) argues, "We need to make room for grief work, for passions of fear and sorrow, for dreams and desires" (p. 16). Lost is perhaps one of the most important emotions in teaching: passion. Palmer (1993) believes that most teachers go into the profession because "of a passion to connect" (p. x). However, Palmer feels that institutional restraints can drain teachers' passion, thus taking the life out of their teaching. Duffy (2002) "want[s] our teachers to be passionate enough about their mission to be able to maintain a sense of joy and renewal despite the frustrations they are certain to encounter" (p. 335). The question is how?

Effective strategies for transformative learning

The adult educator plays a vital role in fostering transformative learning because she must have a clear understanding of herself, develop relationships with the adult learners, facilitate discourse, utilize activating events and rituals, foster critical reflection, and provide continued support. The educator's role and strategies are discussed in what follows.

Cranton (1994) identifies three types of teachers: subject-centered, consumer-oriented, and reformist. A subject-centered teacher's primary goal is to transmit content knowledge to students. Her power rests in her authority, and she controls resources, rewards, and punishments. The consumer-oriented teacher gives power over to the learners by allowing them to set learning goals. The consumer-oriented teacher has personal power such as charisma. Finally, the reformist teacher becomes a co-learner with the students who shares in the decision-making process over learning. This type of

teacher is interested in institutional change and is more likely to teach for transformation. Brown (2005) argues that

> To foster transformational learning and a critical examination of beliefs, educators need to be active facilitators and co-learners who go beyond simply meeting the expressed needs of the learner. Through a wide array of roles, methods, and techniques, they need to take on the responsibility for growth by questioning the learner's expectations, beliefs, and actions (p. 20).

Brown echoes Mezirow (1997) in that educators must become co-learners. Mezirow (1997) writes, "Ideally, the facilitator works herself out of the job of authority figure to become a colearner by progressively transferring her leadership to the group as it becomes more self-directive." As Cranton (1994) suggests, the educator gives up power to the learner.

Before an educator can facilitate learning for transformation, he must critically examine his own beliefs and assumptions about learning as well as their source. "Having a strong self-awareness of who we are as teachers and as people" is crucial before the educator can lead learners in challenging their assumptions (Cranton 2006). Cranton (2006) and Tisdale and Tolliver (2001) call for educators to share their "authentic" selves with their students. "*Authenticity* is the expression of the genuine self in the community" (Cranton & King, 2003). Being authentic is being open, honest, and genuine.

To spark transformation by encouraging learners to examine assumptions, the educator can utilize critical incidents (Brookfield, 1990) or activating events (Cranton, 2002). Critical incidents involve learners writing about important or significant events in their lives, both positive and negative. In their descriptions, learners include details such

as when, where, who, what. Brookfield (1990) has found that critical incidents can be useful tools in examining learners' assumptions. Activating events are activities that expose learners to opposing viewpoints. Cranton (2002) has found that literature, documentaries, and films are useful in activating learners' examination of their own views and assumptions. Dirkx (in Dirkx, Mezirow & Cranton, 2006) and Tolliver and Tisdale (2006) believe that literature, art, and music communicate inner lives and have potential to connect to learners' inner lives.

> How do the words of the text, of what we read, hear, see or experience become part of who we are, lend meaning to our lives, illuminate those aspects of our lives shrouded in darkness or mystery? Clearly, it is more than memory, more than remembering what we read, see, hear, or experience. The process of learning represents the process of the word becoming an integral part of our being. And when this happens, it has the potential to transform our sense of self and our being in the world (Dirkx, Mezirow & Cranton, 2006, p. 130).

The educator can use literature, film, art, and music as a means for learners to examine their own beliefs by examining why they connect to the piece. In addition, these works can also initiate dialogue among learners.

As mentioned earlier, communicative learning, or dialogue, is necessary to foster transformation (Mezirow 1991, 1997). Cranton (1994) suggests that the educator build in time for critical discourse during professional development. In doing so, the educator must be skilled in leading such dialogue:

> Effective discourse depends on how well the educator can create a situation in which those participating have full information; are free from coercion; have equal opportunity to assume the various roles of discourse (to advance beliefs, challenge, defend, explain, assess evidence, and judge arguments); become critically reflective of assumptions; are empathic and open to other perspectives;

> are willing to listen and to search for common ground or a synthesis of different points of view; and can make a tentative best judgment to guide action (Mezirow, 1997).

To foster dialogue, the educator must set the norms for civil discourse, foster respectful disagreement, and encourage participation from all students. Communicative learning empowers learners and can lead to critical reflection (Cranton 1994).

Educators need to facilitate critical reflection. Questions such as "What happened here?" and "How did I come to think this way?" and "Why is this important?" can serve as a starting point for reflection (Cranton & King, 2003, p. 32). Educators can also ask learners to identify what they perceive as critical incidents in their learning experience and then answer these questions: “Who was involved in the incident? What were the characteristics of the individuals involved? What made the incident positive or negative? and What insights did you gain as a result of the incident?” (Cranton, 1994, p. 184). Journaling is also a viable vehicle for critical reflection, especially when the format is open-ended (Cranton, 1994, 2002). Another tool for fostering critical reflection is the use of metaphors. Palmer (1993) asserts that “The purpose of metaphor is to open our understanding to new possibilities” (p. 61). Mezirow (1997) and Tolliver and Tisdale (2006) argue that metaphor analysis helps learners communicate meaning. Similar to metaphor analysis, “Naming and elaborating the various images that come to populate conscious awareness during the learning experience encourages learners to be in conscious relationships with these energies and images which manifest in their learning

experiences and everyday lives" (Dirkx, 2001, p. 16). Thus, critical reflection can take many forms.

Attending to the learning space is another element that the educator must tend to in order to create a learning environment conducive to transformation. Dirkx (1997) believes that the physical space "can reflect itself in the soul of the group." He cautions educators not to neglect the physical space, but to create an environment that is warm, inviting, and inclusive. "A learning space has three major characteristics, three essential dimensions: openness, boundaries, and an air of hospitality" (Palmer, 1993, p. 71). These three dimensions create a sense of community where all learners are welcome. Rituals are one means of providing boundaries and creating hospitality where "everyone receives each other" (Palmer, 1993, p. 73). Rituals are more than rules and procedures; they are a means of connecting with each other. For example, Tolliver and Tisdale (2006) open their classes with a sharing ritual. Each person shares "the joys and difficulties" that they have experienced since they last met together. Tolliver and Tisdale assert that this ritual fosters a feeling of community among learners. They also use symbols such as earth, water, and fire to serve as touchstones "because learning takes place in the context of our life experience in the world, and these symbols can serve as a reminder of that (p. 43). Finally, Tolliver and Tisdale (2006) provide closure to their courses through celebrations.

Rituals are a means of building relationships among learners, which Taylor (2007) in his review of recent studies found to be most important in fostering transformation. Educators can encourage three types of relationships that can foster transformative adult

learning: respectful distance, collegiality, and closeness. A respectful distance is created when educators know their students, know their content, and bring the two together. Collegiality is when the educator works as a co-learner with her students. Close relationships mean that educators and students know each other both inside and outside the classroom (Cranton, 2006). Friere (2005, 1970) asserts that relationships must be built on mutual trust and that the educator's "efforts must be imbued with a profound trust in people and their creative power. To achieve this, they must be partners of the students in their relations with them" (p. 75). In a study of a professional development program with community college instructors, Eisen (2001) found that trust along with "non-evaluative feedback, nonhierarchical status, voluntary participation and partner selection, shared goals and authenticity" contributed to transformation (in Taylor, 2007, p. 179). Carter (2000), through six months of interviews with nine mid-career women, discovered that relationships are crucial to transformation. Adult educators should develop activities that will foster relationship-building.

The adult educator's role does not end with the end of the professional development activity. Cranton (1994) asserts that educator's have a responsibility in providing support to learners as they begin implementing their learning. She suggests, in part, the following:

- Encouraging critical questioning, perhaps through having learners each develop a series of questions and using them with the group
- Emphasizing any discrepancies between the experience and the theoretical positions related to the experience
- Suggesting that learners share any related experiences and compare them

- Using a brainstorming activity to generate insights, thoughts, and feelings derived from the experience
- Encouraging learners to develop hypotheses or plan actions based on these insights
- Providing learners with the opportunity to validate their new ideas in another concrete experience (p. 185).

Before returning to the classroom, teachers need time to plan and practice implementing new learning. The opportunity to practice new learning can yield new insights (Cranton & King, 2003). In addition, teachers also need support once they return to the classroom in order to sustain transformation. Gallagher (1997) conducted a study with seven adult students who participated in a summer program learning how to utilize drama-in-education. During the summer program, Gallagher video-taped the sessions in order to accurately capture the strategies and the participants' involvement. Five to seven months later, she conducted telephone interviews with the participants. Participants identified three areas that they found meaningful in changing their understanding: experiencing the dramas first-hand, feeling a sense of community, and reflecting on the experiences. However, the time-intensive nature of planning, lack of administrative support, and lack of technical support proved to be constraints in implementation. Support is the final piece that ensures transformation.

Future Transformational Learning Research

King (2004) and Taylor (2007) offer suggestions for further research in the area of transformative adult learning. King (2004) suggests that researchers ask, "What does

it [professional development] mean for their lives and work one or two years later, for instance?" (p. 172). This question not only gets to the sustainability transformation, but also at the ways that transformation evolves over time. In his review of research, Taylor (2007) found an emerging body of knowledge that relationships are important fostering transformative learning. A question for further research should be, "What is a transformative
relationship?" (p. 187). Taylor (2007) finds that transformative adult learning continues to grow as a goal for professional development and should be researched more fully.

Summary of Transformative Adult Learning

Transformative Adult Learning theory is grounded in Mezirow's work (1990a, 1990b, 1991, 1997). Mezirow asserts that transformation occurs when a person encounters a disorienting dilemma that challenges their assumptions. This disorienting dilemma sparks a change in meaning perspective. In order for transformation to occur, the person must act on the change. Mezirow's work has been expanded by Cranton (2006), Dirkx (1997, 2001), and Tisdale and Tolliver (2001) to include not only cognitive learning, but also somatic and spiritual learning. Effective strategies in teaching for transformation include engaging in dialogue and reflection (Mezirow, 1990a, 1990b, 1991, 1997; Cranton, 2006), organizing activating events that challenge assumptions (Brookfield, 1990), communicating authentically (Tisdale & Tolliver, 2001), and providing support in implementation (Cranton, 1994; Cranton & King 2003). Further

research in the sustainability in transformative learning and the implications for teacher professional development are needed (King, 2004; Taylor, 2007).

Comparison of Effective Professional Development and Transformative Adult Learning

Effective professional development and teaching for transformation share common structures including authentic dialogue, critical reflection, and technical support. However, I chose transformational adult learning theory as a lens to examine data because it involves not only the cognitive domain, but also the physical and affective domains as well.

Summary

Shakespeare Lives! is a professional development program that utilizes strategies of effective professional development and of transformative adult learning. Both teacher professional development and transformative adult learning aim to transform teachers' practice. Therefore, it is not surprising that the two share beliefs in how to facilitate the change. Experiences that actively engage the teacher-learners in content and process as well as critical reflection on the experiences are crucial in initiating change. In addition, creating communities of learning in which teachers engage in dialogue assists them in making meaning of their experiences. Providing a safe, supportive environment is crucial in sustaining transformation. Further research into programs that foster transformation is

needed to determine the efficacy of strategies that sustain transformation (Bransford, Brown, and Cocking, 2000; Borko, 2000; Garet, Porter, & Desimone 2001; King, 2004; Taylor, 2007). Shakespeare Lives! is one such program that utilizes effective strategies for both professional development and transformative adult learning. This study examined the sustainability of the professional development and of the initial transformations that teachers reported in 2005.

CHAPTER III

METHODOLOGY

The purpose of this collective case study was to determine whether the changes that Shakespeare Lives! teachers initially reported in 2005 were sustained three years later, as well as whether these changes were transformative. This chapter describes the design of the study and procedures used, including the selection of participants, data collection, and data analysis. This chapter concludes with how I addressed validity and reliability.

History

In 2005, Shakespeare Lives! selected seven teachers forming its sixth group to participate in the program. These seven teachers from rural, low-wealth counties in North Carolina participated in the initial pilot study from June-November 2005. I used convenience sampling by inviting everyone in the 2005 group to participate in this follow-up study (Creswell, 2005). The pilot explored the Shakespeare Lives! experiences that the teachers found meaningful. During the pilot study, I served in the role of observer/participant. Although I spent most of the time conducting interviews and documenting workshops, I also participated in some of the workshops. At no time did I serve in a position of authority. The pilot study findings revealed that all of the teachers

changed their pedagogy for teaching Shakespeare. In addition, two teachers identified a deeper consciousness of professional changes such as a change in philosophy. Two teachers described personal changes, namely finding a balance between "doing and being."

Participants

Using convenience sampling (Creswell, 2005), I invited all the original teachers to participate in this study. Six of the seven teachers agreed.

Teacher 1-Benvolio: Benvolio taught 11th and 12th grade English at a school in the foothills of North Carolina. A thirty-year veteran, Benvolio also supervised the yearbook.

Teacher 2-Beatrice: Approaching 30 years of teaching, Beatrice taught 9th and 12th grade English at a high school nestled in the mountains of North Carolina. Since participating in Shakespeare Lives!, Beatrice finished a masters degree, earned National Board certification, and served as her school's teacher of the year. At the time of her interview, Beatrice was transitioning into a new position as literacy facilitator for her school and was working on her doctorate in school administration.

Teacher 3-Cordelia: At the time of this study, Cordelia completed her sixth year of teaching and earned tenure. Teaching 9th and 12th grade English, Cordelia works with Beatrice. Cordelia also served as the implementation facilitator for the graduation project. Since participating in the program, Cordelia also worked on her master's degree.

Teacher 4-Ariel: Ariel taught both drama and 12th grade English at a school in the mountains of North Carolina. A thirteen-year veteran, she began her career at a middle

school. Since her participation in Shakespeare Lives!, Ariel achieved National Board Certification.

Teacher 5-Kate: Kate taught 11th and 12th grade English for twenty-five plus years at a high school located in the coastal region of North Carolina. She also teaches Education in America, a course for students interested in a teaching career.

Teacher 6-Puck: Puck taught 12th grade English at a school located in the foothills of North Carolina for nearly thirty years. Going to London had been Puck's "dream."

While all of the teacher participants came from rural, low-wealth counties in North Carolina, the settings for the interviews were determined by the participants. The interview settings included teachers' classrooms, homes, a bed and breakfast, and a restaurant.

Design

A collective or multiple case study was an appropriate design for this study (Creswell, 2005; Merriam, 1998; Yin, 2003) because it is bounded by time, it "investigates a contemporary phenomenon within its real-life context," and "the boundaries between phenomenon and context are not clearly evident" (Yin, 2003, p. 13). Each teacher participated in the Shakespeare Lives! program and returned to his/her individual classrooms to implement performance-based strategies. Because the study involved six teachers, each teacher represents an individual case (Yin, 2003).

This study was bounded by context, by time, and by participants. (Creswell, 2005; Merriam, 1998; Yin, 2005). The boundary between the context of the trip to the

International Shakespeare's Globe Theatre, London and the structure of the Shakespeare Lives! program is not clear. The study is also bounded by time; data collection occurred between June through August, 2008. Finally, the study was bounded by participants.

Before collecting data, I renewed the Institutional Review Board approval. On the original participant consent form, I explained the procedures for collecting data, explained the minimal risk, guaranteed anonymity, and noted that the participant may withdraw at any time without penalty. At no time did I serve in a position of authority. None of the six teacher participants chose to withdraw from the study.

I began the case study protocol (Yin, 2005) by emailing each of the teachers who participated in the pilot study to ask if they would be willing to participate in a follow-up study. Initially, I received a positive response from six of the seven participants. The seventh teacher did not respond to emails or telephone calls. As part of the IRB renewal for this study, participants signed another consent form that outlined the data collection procedures for this study which included quick-writes submitted through emails, artifacts representing teaching during the past three years, interviews, and follow-up emails. Two months later, I emailed the seven teachers again. In this correspondence, I wrote, "In my pilot study, I found that all of you experienced change: professionally, personally, or both. What I am interested in is whether those changes have been sustained over time." In addition, I briefly explained that my primary source of data collection will be recorded interviews. I closed the second email asking that each participant confirm his/her willingness to participate in the follow-up study and to check his/her calendar for possible dates for me to visit between early June and June 30, 2008 (See Appendix A).

Once interview dates and times were scheduled, I sent a confirmation email that thanked the teacher for participating in the study, related the purpose of the study, assured anonymity, offered the opportunity to review transcripts, and confirmed date and time. In addition, the email requested that the teacher bring 3-5 artifacts that represented their teaching during the past three years as well as directions to the interview site (See Appendix B).

Data Collection

Sources of data included archival data from 2005, quick-writes by participants, artifact sharing, interviews, and follow-up email questions with each teacher. What follows is a description of each data source.

Archival Data Archival data includes the interview transcripts and workshop notes from the 2005 pilot study. I used these data to identify the changes teachers initially attributed to Shakespeare Lives!. I identified segments of archival data that indicated change, and I used these quotes in a quick-write prompt to teachers via email. I also used the archival data to explain workshop activities that teachers referenced in interviews.

Quick-write The purpose of the quick-write was to prompt teachers to reflect on the past three years and also to serve as a data source to compare with other interview responses. To devise the quick-write prompts, I reviewed archival data, namely interview transcripts for each teacher from 2005, looking for references to teacher change. Each quick-write prompt began, "In 2005, you said . . . ." I copied and pasted an excerpt from the archival

data that referenced change or a meaningful moment for that individual. The excerpt was followed by the question, "What do you think now?" Before each interview, I emailed each participant asking them to respond to the prompt by writing quickly for five minutes. In some cases, the quick-write responses informed specific interview questions. Table 1 lists each participant's quote, from the archival data, used in the quick-write prompts.

Table 1 Participants' quotes, from the 2005 archival interview data, used in quick-write prompts

Teacher	**Quick-Write prompt: *In 2005, you said….***
Benvolio	I can't be too specific about things I've learned because every thing I've done has been a learning experience for me. I have zero experience in theatre. Even though I taught drama one semester (laughs) I was totally unprepared for that. Um…working with Glynnie and having her, having her talk about taking in from the heavens and taking in from the earth and then releasing it and uh, going through the elements with her. Angie and I talked about that today, how that's so energizing to do that.
Beatrice	My card [angel card that contains a word to consider] last night was *transformation* and if any word, I started out with *humor*, and I do use humor in many different ways and one way is to cover up fear, but another way, the transformation, to go back in my classroom, it will not be taught out of a book for us to read line by line. And that was just the greatest feeling of all. And if nothing else, there's millions of things I've learned, it's worth that one thought that it can change and it has to change with me.
Cordelia	This experience has had such a profound impact on me as a person and as a teacher. And trying to explain to somebody who doesn't understand, who has, you know, an idea of what staff development is like, you know, they'll think, oh, you had a trip to London; that must have been great. And it was great being in London, but this experience in the ghetto would have been great, you know? It was just the experience was such much more important than where it was, other than the Globe.
Ariel	I think through this my comfort zone has expanded. I think I found more security in relaxing back, taking that deep breath, finding that center and

	letting whatever comes, come from there. Um,… to take from the heavens and then give it all away. And then what you give is real. It's not what people expect. It's not, it's not meeting what you think they want, it's…giving of your genuine self. And I try to do that, but I'm not always successful. You know, and I, and I tend to be a very feeling person and I can't hide that, but sometimes, being a Southern girl, you know, we do phrase things very nicely to people instead of just cutting to the chase sometimes. And, and I think I will be more forward, being a little more direct. I think that I will be much calmer in dealing with things because as Stewart says, sometimes you have to focus on yourself and when you focus on yourself, you have more to give. And um, as a teacher towards the end of the year, I run out of things to give. Because, for me, it's not really a thing of ok to take, to take back. I think I'll be looking for the ways to take back and then to, to renew and energize. You know, I will use this experience to help me do that. I will stop and go, ok, what did Glynnie say? Uh, ok, what did Stewart say? Oh, let's lay down and breathe. And um, ironically, I do that lesson with my kids at least once during year, the visualization, I do that with them, but I never do it for myself. And, it's ok to. It's ok to relax. I just think I'm going to better all the way around. Not that I was bad, but different growth in a positive direction.
Kate	It's hard to articulate when you're tired. There's so much to say. There's so many possibilities that you had an inkling was there, but it's hard to know how to um make them materialize. You've given us so much equipment to be able to do that. They usually give you a quick example and they leave. But here you can see how it manifests itself. It can be done with any literature. I see so much that can be done with this methodology. It's opened up the possibilities. They're limitless.
Puck	I'm a different teacher. It's just wonderful. Tomorrow might be wretched. But I'm living in the moment and it's wonderful.

Artifacts In a confirmation letter to teachers, I asked that they bring five artifacts that represented them as a teacher over the last three years, "which [would] be useful in providing additional information" about ways teachers view themselves (Yin, 2003, p. 93). The rationale for teachers sharing artifacts was that the responses could yield references to teaching practices and philosophies. Suggested artifacts included items such as a journal, a student response, a photograph, a poster from the classroom, or a lesson

plan. Some teachers brought artifacts to the interview, and I asked for permission to photograph the artifact so that I could accurately describe them in the data analysis. Teachers who did not bring artifacts to the interview described the artifacts for me. Table 2 provides the artifacts that each teacher shared.

Table 2 Teachers' artifacts

Teacher	**Artifacts**
Benvolio	Student-made swords
Beatrice	Student-made masks and playbills
Cordelia	Student-made masks and playbills, "Wooden-O" bag with notes and newspapers from London
Ariel	Photographs of classroom and student work, card from a student
Kate	Mandela, note from student, props for witches in *Macbeth*
Puck	Bridle, whistle, and bow

Inteviews "Interviewing is also the best technique to use when conducting intensive case studies of a few selected individuals…sometimes it's the *only* way to get data" (Merriam, 2005, p. 72). As mentioned earlier, interviews provided the primary source of data. Because one purpose of this study was to determine whether the changes that teachers initially reported in 2005 were sustained as well as whether these changes were transformative, interviews yielded the most data. For this study, I engaged in what Rubin and Rubin (2005) term *responsive interviewing*: "the researcher is responding to and then asking further questions about what he or she hears from the interviewees rather than relying on predetermined questions" (p. vii). Interviews were semi-structured in that some questions were written ahead of time in the interview protocol (see Appendix C), but other questions grew out of the interview (Merriam, 1998). Three types of questions

were used: main, follow-up and probes (Rubin & Rubin, 2005). Main questions directly related to the research problem and questions. Follow-up questions "pursue[d] concepts and themes that [were] introduced by the conversational partners" (Rubin & Rubin, 2005, p. 200). Probes were used to gather more detail about a topic.

Follow-up emails I posed any necessary follow-up questions and requested that the teacher answer them in an email response (Rubin & Rubin, 2005). I asked each teacher two questions in addition to follow-up questions based on the interview: *Was there a moment in the SL experience that challenged your ideas about teaching and learning? What Shakespeare character best represents you and why?* The purpose of the former question was to uncover possible assumptions teachers may have held prior to the Shakespeare Lives! experience. In addition, the question allowed for the teacher to talk about changes or transformations without my asking a leading question. The purpose of the latter question was to provide a pseudonym for the study and to collect more data about how the teacher viewed himself/herself.

Data Collection Procedures

I collected data in three stages.

Stage 1 During this stage, I read through all of the archival data to search for statements each teacher made in reference to changes they attributed to the Shakespeare Lives! experiences. I then emailed the statements with the question: In 2005, you said. . . . What do you think now? All the teachers emailed responses before the interviews.

Stage 2 All interviews were digitally recorded to capture the exact words of the teachers as well as to capture the tone. In addition, I took notes during the interview on the right side of my research journal. This not only provided a back up in case of problems with the recording, but also kept me focused on what the teacher said, enabling me to ask follow-up questions (Rubin & Rubin, 2005). I began each interview by securing verbal permission to audio record the interview and by reminding the teacher that I would also be taking notes. At the beginning of the recording, I noted the name of the teacher, the date, time and place of the interview. Merriam (1998) and Rubin and Rubin (2005) recommend opening with a neutral open-ended question in order to reconnect with the interviewees and to put them at ease; therefore, I opened each interview with "What has been going on with you the past three years?" This question not only allowed the teacher and me to catch up, but also provided an opening for the teacher to talk about Shakespeare Lives! strategies. I used the interview protocol throughout the interview, but also asked probing questions.

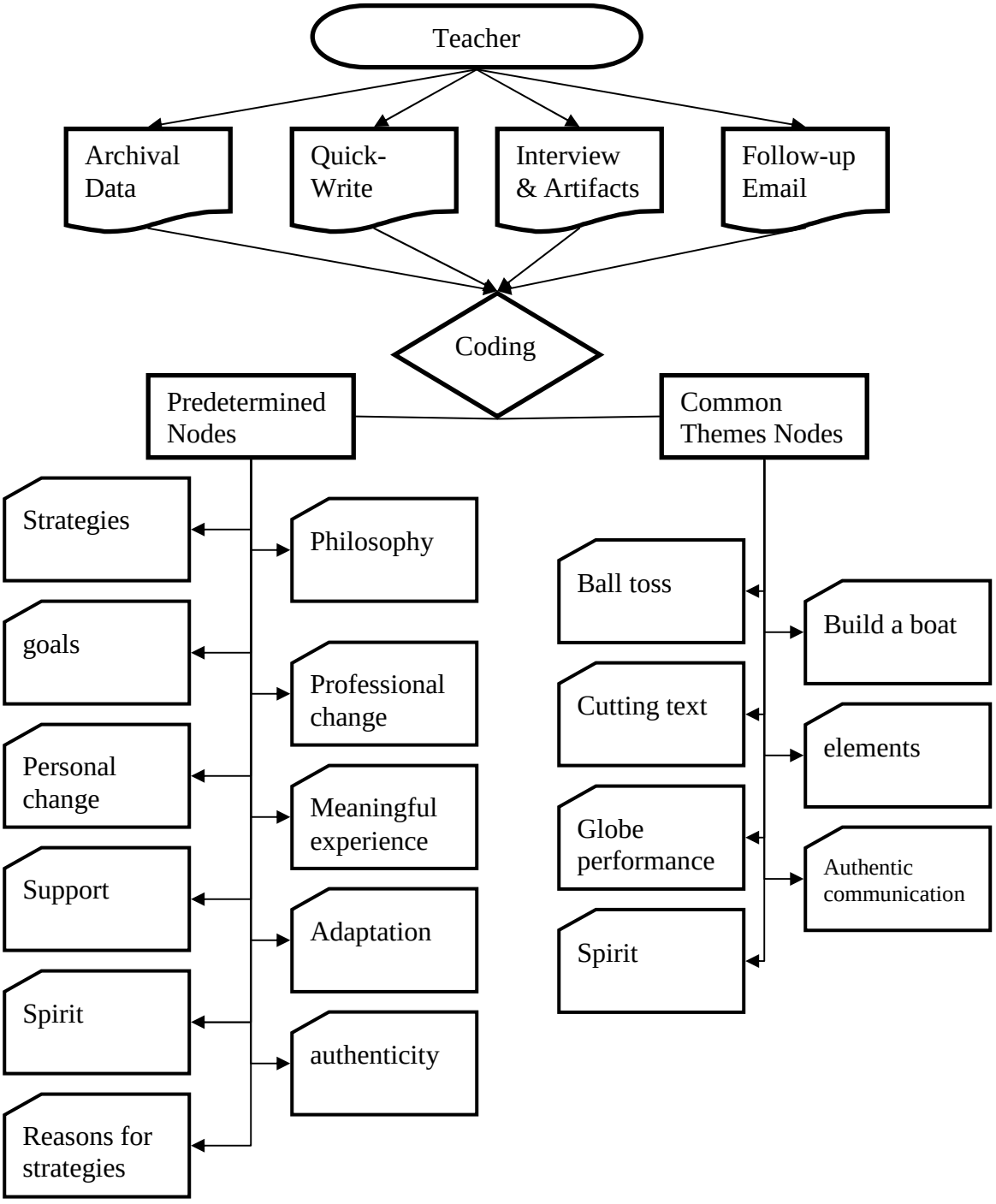
Stage 3 Immediately after each interview, I read the notes that I took during the conversation. On the left page of the journal, I wrote my initial reactions and reflections; I also composed possible questions for the follow-up email. Rubin and Rubin (2005) recommend transcribing the interview while it is fresh in the interviewer's mind; therefore, I imported the digital recording into qualitative data analysis software NVivo8 and transcribed each interview within the program before I interviewed the next teacher. During the transcription phase, I noted on the left pages of my journal recurring words or

patterns such as *Globe performance, authenticity,* and *elements*. These words became nodes in data analysis. Once I completed the teacher's transcription, I entered the third stage of data collection by emailing it to the teacher for review and corrections. In addition, I asked follow-up questions from the interview as well as two questions common to each participant: *Was there a moment in the SL experience that challenged your ideas about teaching and learning? What Shakespeare character best represents you and why?*

Data Analysis

After transcribing each interview, I imported archival data from 2005, quick-writes, and follow-up emails as separate documents into the qualitative analysis software NVivo8. Each document was identified by the teacher's name and the data source, such as *Puck quick-write*. I began initial within-case data analysis by reading through each quick-write, transcript, and follow-up email response for an overall impression, and writing the initial impression in my research journal (Merriam, 1998). See Figure 1 for Data Analysis Flow Chart that illustrates the procedures for coding the data sources.

Figure 1 Data Analysis Flow Chart



Each teacher represents a case that has its own data set. I created a nodes or categories based, in part, on Mezirow's (1991) suggestion for evaluating the extent of a transformative learning experience: "Evaluation gains made as a result of transformative learning should attempt to map the learner's initial meaning perspective and compare it with his or her later meaning perspective" (p. 226).. I created predetermined nodes, or categories, based on elements of effective professional development, transformative adult learning, my research questions and my interview questions: *strategies, reasons for using strategies, authenticity, adaptation, meaningful experience, teaching philosophy, support, professional changes* and *personal change,* and *spirit*. For Teacher 1, Benvolio, I coded data in these steps:

1. I read the archival data document.
    a. I highlighted references to any of the predetermined nodes.
    b. For the first highlighted reference to a predetermined node, I created a "free node." In order to understand a free node, envision a "My Documents" folder on a computer desktop. When you open "My Documents," you may find free-standing documents, as well as specialized folders that have a more specific theme. A student, for example, may have a folder for each class she is taking such as English, history, etc. A free node is similar to a document that does not fit into one of her class folders.
2. Next I read Benvolio's quick-write response.
    a. I highlighted references to any of the predetermined nodes.

b. For the first highlighted reference to a predetermined node, I created a "free node."

c. For highlighted references to now existing nodes, I coded the references at those nodes, which is similar to adding information to a previously saved document.

3. I repeated steps 1 and 2 for the remaining documents: the interview and the follow-up email.

4. Once I coded all data sources into free nodes, I created a tree node entitled "Benvolio." A tree node simply organizes all of the free nodes under one heading similar to creating a folder that holds documents under a common theme such as English class or history class.

Once I coded Benvolio's data sources, I repeated the steps for the other five teachers.

As I coded the data sources for each teacher, I began to notice common themes among the teachers. Therefore, I created free nodes for specific Shakespeare Lives! strategies: *ball toss, build a boat, elements,* and *cutting text*. I also created other nodes under common themes: *Globe performance, Gosden House, authentic communication* and *spirit*. Once I coded all the data sources for common themes, I collected the free nodes into the tree node "common themes."

After coding all of the data, I worked at explanation building, which is "to 'explain' a phenomenon [in order] to stipulate a presumed set of causal links about it" (Yin, 2005, p. 26). In this study, I explored the nature of teachers' transformations within

adult transformative learning theoretical framework. After detailing each teacher's responses, I answered the research questions for each using the following decision rules.

Answering Research Question 1: What pedagogical changes made three years ago do teachers continue to use?

To answer this first sub-question for each teacher, I read through the data coded in the node "strategies." For example, when Benvolio mentioned text cutting, I coded it under "Benvolio strategies." Data from 2005 and 2008 were conveniently located in this one location.

Answering Research Question 2: What professional changes do the teachers describe?

Most of the main questions from the interview protocol had potential to yield data for this response. The nodes "meaningful experiences," and "professional changes" yielded answers to this question. For example, I coded Kate's response to the interview question *What was your most meaningful experience?* in the node, "Kate meaningful." Ariel's references to "letting go of control" were coded under "Ariel professional changes"

Answering Research Question 3: What personal changes do the teachers describe?

The nodes "meaningful experiences" and "personal changes" yielded answers to this question. For example, Ariel's references to finding balance was coded "Ariel personal changes."

Answering the Central Question: In what ways are the changes teachers attributed to Shakespeare Lives! sustained three years after their professional development experience and in what ways are the changes transformative?

To answer this question, I returned to the quick-write to identify changes that teachers attributed to Shakespeare Lives! in 2005 and compared responses to what they said in 2008. Next, I looked at the nodes "strategies," "professional changes," and "personal changes" to determine the type of transformation: pedagogical, professional, and/or personal.

Once I completed the case-by-case analysis, I began the cross-case analysis. The tree node, "common themes" provided the data for similar strategies and classroom experiences the teachers shared.

Validity and Reliability

The first detriment to reliability and validity is researcher bias. Because I am a practitioner with the Shakespeare Lives! program, and because I served as a observer/participant in the pilot study, my "subjectivity is like a garment that cannot be removed. It is insistently present in both the research and nonresearch aspects of [my]

life (Peshkin, 1998, p. 17). Friere (2005, 1970) and Palmer (1997) recognize that objectivity is basically impossible when conducting research with human beings:

> The real danger of the investigation...lies in the risk of shifting the focus of the investigation from the meaningful themes to the people themselves, thereby treating people as objects of the investigation. Since this investigation is to serve as a basis for developing an educational program in which teacher-student and students-teachers combine their cognitions of the same object, the investigation itself must likewise be based on reciprocity of action (Friere, 2005, 1970, p. 107).

> The myth of objectivity, which depends on a radical separation of the knower from the known, has been declared bankrupt. We now see that to know something is to have a living relationship with it--influencing and being influenced by the object known (Palmer 1997, p. xv).

Structures are in place to offset the possibility of bias in this study. The construct of this study involves multiple sources of evidence including archival evidence from the pilot study, interviews, observations, and lesson plans. Although interviews are the primary data source, observations and lesson plans are designed to support interview responses or uncover contradictions. In addition membership checking (Creswell, 2005) will be utilized at various points in the study: at the transcription phase, during the analysis stage, and with the final written report. To achieve internal validity, I will provide "thick descriptions" of data (Merriam, 1998, p. 29) along with explanation building (Yin, 3003). Using multiple cases (teachers), a cross analysis of the data, and generalizing the "results to [a] broader theory" provides external validity because the findings have the potential to be more robust (Yin, 2003). Reliability can be achieved by detailing the methodology and data analysis in the final report so that others can replicate the study (Yin, 2003).

Summary

A collected case study is an appropriate design for this study because it is bounded by context, by time and by participants. Five types of data (archival, quick-write, artifacts, interviews, follow-up email responses) were collected in three stages. I imported all data into the computer program NVivo8 and coded the data according to patterns and themes that emerged from the data. Once the data was coded, I analyzed the codes using explanation building (Yin, 2003).

CHAPTER IV

RESULTS

This chapter provides a description and analysis of each individual case or teacher, followed by a cross-case analysis that relates themes common to all of the cases (Yin 2003). Teachers are presented in the order that I interviewed them.

Each teacher description begins with his or her years teaching experience, his/her reasons for entering the Shakespeare Lives! program, his/her change attributed to Shakespeare Lives! in 2005, and his/her self-selected Shakespearean pseudonym. I asked each teacher to select a character from Shakespeare's plays that represents his/her teaching over the past three years. My rationale is that it provides another means to see how the teachers view themselves. The next section of the teacher description deals with pedagogy, namely the Shakespeare Lives! strategies that the teacher continued to use, adaptations the teacher made, and challenges the teacher faced, and perceptions of support. The discussion of strategies leads to the teacher's most meaningful experience(s) in the Shakespeare Lives! program. An examination of strategies, adaptations, and meaningful experiences unfolds the teacher's teaching philosophy and future goals. Each teacher's description concludes with a discussion of each research question that guided this study.

The cross-case analysis examines common themes among the teachers, including strategies that they continue to use, experiences that they found meaningful,

and ways that the teachers were transformed. This analysis concludes with a discussion each research question that guided this study.

Case-by-Case Analysis

Teacher 1: Benvolio

I conducted my interview with Benvolio on a most auspicious day: his last day with students. After thirty years of teaching, he along with his wife, who taught math at the same school, were retiring together. For his pseudonym, he wrote, "You can call me Benvolio, a supportive, positive guy that does not necessarily attract a lot of attention." From my observations, I find this to be an apt description. With a ready smile, Benvolio was the most reticent of the group, but always willing to give a positive effort in every workshop. Benvolio first heard about Shakespeare Lives! from his principal who received an email about a professional development program that involved "a trip to London where all I have to pay for is my meals." The trip sounded attractive so he "pursued it and [he] really didn't know what was going to be involved at the time." Benvolio later discovered that his commitment involved more than he originally thought:

> [T]hen I found out later there was a lot more involved than I knew about. Then when I got Shakespeare Camp at School of the Arts, I found out what I was in for and it was a whole lot more than I anticipated. Also there was more in the future, more follow- up than I knew about ahead of time.

Benvolio smiled when he said that he wasn't "scared off." Benvolio made pedagogical changes in 2005, namely using strategies dealing with status and character relationships. For example, one status exercise requires students to work in partners with one person

having authority over another. They use the dialogue, “Please,” and “No,” and demonstrate the status through voice and gesture.

I interviewed Benvolio in his classroom, which contained artifacts of his teaching. Motivational posters hung on the walls bearing messages such as “Stand up for what’s right, even if you’re standing alone.” “Attitude is a little thing that makes a big difference.” “If you expect respect, be the first to show it.” “We can choose to throw stones, to stumble on them, to climb over them, or to build with them.” “Never settle for less than your best.” These posters communicated Benvolio’s values of respect and good effort. Along the back wall, hung twenty-seven awards from the North Carolina Scholastic Media Association; Benvolio served as yearbook advisor for the school. I noticed that references to Shakespeare were absent.

Benvolio identified only one artifact of his teaching representing his teaching over the past three years: a pair of wooden swords sanded to a smooth finish, marred only by a few notches. Benvolio described the swords in this way:

> These are projects that my seniors did this year when we were studying *Beowulf*. But they've gotten some use in other skits as props. When there's a sword called for, they get broken out. You can see there's a few notches in them. A few nicks. They didn't have those when they were first turned in. Sword play is an easy thing as far as acting out. Guys especially love them. Get up and swing them around.

Benvolio explained the purpose of the assignment.

> Benvolio: Actually they had a choice of things they could do related to either *Beowulf* or *Mort d'Arthur* or *Sir Gawain and the Green Knight*. Those just happen to be from *Beowulf.*
> LNM: and what did they do with them? How did they present them?

> Benvolio: They were supposed to get up in front of the class. Some dressed as they thought Beowulf would have dressed. And explained when they would use these swords and explain when they were ineffective. They told us that Beowulf did not use this sword when they fought against Grendel.
> LNM: Right.
> Benvolio: Grendel had no weapons, so fought him barehanded. But then he used the sword later on. And so apart from his building the sword, they were supposed to relate something about the story that tied it in.

The sword artifact reveals that Benvolio designed assignments that allow for students to analyze character and to demonstrate their analysis in a creative way.

The sword artifact also revealed that Benvolio continued to use performance techniques three years after his Shakespeare Lives! experience when he mentioned that "they've gotten some use in other skits as props." Many of the strategies that Benvolio continued to use involve character analysis and development:

> . . .we work on status, relationships between characters, and we do little freeze-frames. That seems to be the most effective. They pick out lines from the particular scene that they're assigned that try to express the key element of the scene. And then they'll have several different poses that they get into.

Status exercises examine the hierarchy of relationships, namely which character has power or authority over another. Students demonstrate status through poses such as one person kneeling in front of another. By expressing "key element[s] of the scene" through frozen tableaux, students engaged in somatic learning, which involves both mind and body (Yorks and Kasl, 2006).

Benvolio noted that students responded positively to performance exercises and that the exercises deepened their understanding of text.

> Generally, the students love getting out of their desks (and the classroom) for any reason, so they just think they're playing when we do warm-ups, use our different voices, and show status. Without even realizing it, however, they do a much better job of acting out skits and reading aloud. Even when they are struggling with the language, they maintain the aura of their characters if they have grasped the relationships in a general way.

By maintaining "the aura of their characters," students gained an understanding of text.

In 2005, Benvolio found that cutting text rather than paraphrasing contributed to students' appreciation of Shakespeare's language:

> Well, we, with no matter what we do, we pick out key scenes, and key lines from those scenes. Try to cut out the least important things; keep the most important lines. And work on saying the lines intact. Not paraphrasing. Because in years before I went to London, we did a lot of paraphrasing. Paraphrasing might be good for helping them get the gist of a conversation, but you sure do lose a lot when you get rid of Shakespeare's language. I think kids appreciate the language a whole lot more when you make them learn the real lines.

As the examples demonstrate above, Benvolio continued to have students cut the text, giving them ownership of their learning.

Benvolio said that he uses text cutting and character exercises "[w]henever we're doing a play, whether it's *Crucible* or *Inherit the Wind*, anything from American or British literature. We still have the same relationships between characters, and I've tried to point that out."

Once Benvolio returned in 2005, his administration supported him taking students out of the classroom to engage in performance activities:

> LNM: Umm...How have your colleagues and administration responded when they see you outside, in the gym or in the lobby?

> Benvolio: I think most of my colleagues don't even know what's going on. My principal, first fall when we came back and made spectacles of ourselves, was a little curious. But he knew I had been to London and he did ask me a couple of times, what's the value of this? Why are you doing this? Since then, he's never asked again. So I guess I gave him good enough answers.
> LNM: So how did you answer him?
> Benvolio: Oh I just tried to impress on him the importance of getting up and moving around. Just to energize the kids and get them to try to love Shakespeare.

However, administration support was not the only reason Benvolio continued to use the strategies:

> Part of the reason is we were required to go back and take our students to act out a portion of *The Tempest* that fall. And that was certainly a main impetus. But I could see the results when I worked with the students. I could see the change in them. Whenever I find something that works with kids, I'm going to keep using it.

Benvolio's most meaningful experience in Shakespeare Lives! was the midnight performance on the Globe stage: "I don't think I'll ever get over that." When asked how the Shakespeare Lives! professional development compared with others in his thirty-year teaching career, Benvolio responded:

> It was by far the most enjoyable and the most educational. Because I, I came back and made some immediate changes. And they've lasted. A lot of times you go to those workshops, you have to fill out a little evaluation form at the end---how are you going to use this? And honestly, most of them, I don't use over the years. Or, if it were required to do some follow-up activity, yeah, I'd do that. After the requirement is gone, usually I forget all about it. There's just been a couple of workshops that have had a lasting effect on me for the rest of my career. I can definitely say that Shakespeare Lives! was one of those.

Part of the reason that the Shakespeare Lives! program had a lasting effect on Benvolio's teaching is the context of the Globe Theatre:

> Well, just the opportunity to be in London studying at the Globe was just fantastic. Being away from my family for two weeks, in a separate environment where you were really concentrated in your studies made all the difference in the world. Being to a place I'd never been before. It was a wonderful opportunity and I hope more teachers get the same opportunity.

At the Globe, Benvolio worked with practitioners and received technical support when he returned to his own classroom. Context made for a lasting, powerful learning experience.

> *What pedagogical changes made three years ago does the teacher continue to use?*

Benvolio mentioned using such strategies as cutting text, status exercises, and "freeze-frame" (tableaux). He took his students outside or in the hallway to work with these strategies, not only with Shakespeare, but also other plays such as *The Crucible* and *Inherit the Wind*. Although he mentioned the strategies could be used with any "British and American literature," he did not provide examples of ways he adapted the strategies. Benvolio returned from London and made "immediate changes" in how he taught Shakespeare, possibly, in part, to fulfill a requirement of the program. He continued to use status and tableaux because "[w]henever I find something that works with kids, I'm going to keep using it."

The motivational posters on Benvolio's wall revealed a philosophy of encouragement and personal responsibility. Students recognized that "if they goof off while they're outside, they're not going back. So they usually are pretty good about sticking with the tasks [Benvolio gives] them." Benvolio also fostered collaboration, which he learned from the relationship between actor, architecture, and audience at the

Globe:

> And I've tried to let them know that ...that audience out there is eager to help them, so they shouldn't be intimidated. We don't usually act in front of an audience here. But when we're doing just little scenes, even if it's just a pose with our lines, their peers are out there in the audience, so...that relationship between the actor and the audience. The audience really is on your side. And willing to participate if you call for their participation.

Benvolio also found that it is important to prepare the body as well as the mind for learning:

> The body preparation that we learned from Glynnie can help in any situation, not just in getting ready to act. When my classes are getting ready for a big test, a few quick stretches can work wonders for energizing the sleepy ones and relaxing those filled with tension. Stretching is not just for PE classes anymore!

What professional changes does the teacher describe?

Although Benvolio found the Shakespeare Lives! experience "enjoyable and educational" and continued to use some of the strategies for the last three years of his career, he made no references to changes in his teaching philosophy or in his interactions with students.

What personal changes does the teacher describe?

Other than saying he "would never get over" performing on the Globe stage, Benvolio made no references to personal changes that he attributed to his Shakespeare Lives! experience.

In what ways are the changes the teacher attributed to Shakespeare Lives! sustained three years after their professional development experience, and in what ways are the changes transformative?

Benvolio continued to use performance techniques to teach drama three years after participating in the Shakespeare Lives! program. He practiced what Shulman (1987) called *selection* which is choosing "among an instructional repertoire" of performance strategies (p. 236). Other than explaining that the strategies work, Benvolio did not provide anecdotes to suggest that he adapted the strategies in new ways or that the changes were transformative beyond teaching drama; therefore, Benvolio's transformation can be determined as pedagogical.

Teacher 2: Beatrice

At the time of the interview, Beatrice had taught English for almost thirty years. Before entering the program, she felt concern about Shakespeare, and drama in general, being pushed to the side of curriculum. Because of No Child Left Behind, the writers of the ninth grade End of Course test eliminated drama. Beatrice worried that students would miss out on this enjoyable genre, and believed Shakespeare Lives! could help her meet her students' needs:

> I wanted drama to be fun, and as it was brought to my attention in the program, a play should be just that, a time to play (examine) with words, the issues, and apply them to modern times. I read about the program and the numerous hands-on activities that were offered which interested me, but to actually partnership with the School of Arts and The Globe was icing on the cake. I wanted to know all I could about drama and how to present it so I would be able to enter the classroom to better equip students to understand drama and apply it to their own

> lives. Many of the students I serve have only traveled to adjoining counties (many only to towns 25 miles away due to economic issues), and if this opportunity is not brought into the classroom, they would never receive the richness of a heritage that is pleasing, as well as allows them to study drama with much enjoyment.

Beatrice's introduction to the idea of "equip[ping] students to understand drama and apply it to their own lives" bore out in her teaching and in her students' responses to literature.

In 2005, Beatrice said that she would never have her students read the play "line-by-line" and that changes in her teaching "had to change with me."

Beatrice selected her pseudonym from the play *Much Ado About Nothing*:

> Beatrice from *Much Ado* is the Shakespearean name with which I would associate myself. She is so witty and enjoys playing "games" with Benedick. How I laughed when she told Benedick she had been told he was a consumption! She is spoiled, and I have been spoiled all my life. What a heart, though, when it comes down to it.

Indeed, Beatrice believed that her classroom should involve a sense of play, and she put her heart into teaching as evidenced in what follows.

Beatrice continued to utilize strategies from Shakespeare Lives! in her classroom, namely passing the ball, creating tableaux, cutting the text to perform scenes. In pass the ball, students stand in a circle with the goal of keeping a beach ball in the air. As a student hit the ball, she said a word or a line from a play, which helped in memorization and with focus. Beatrice's students enjoyed passing the ball so much that she sometimes had to remind them of its purpose:

> Beatrice: We did the activity with the ball where you toss and that person can speak and come up with wordings or continue lines and different things. They actually loved that. We started out with a ball, I think at one point in time we had 23 beach balls.
> LNM: At one time?
> Beatrice: In a room at one time. Now, I don't know whether the students decided that was going to be beach ball day, but we had to deflate some of them because I felt like they were getting more into playing than they were purpose. And they can easily do that. So, they love stuff. But to get down to the meaningful purpose of what we're actually doing--they have gone up and down the halls with memorization. Then come back together as a group and a team. Loved that because they saw they had some freedom.

Beatrice connected the beach ball activity to walking the lines, which is students walking the iambic pentameter and changing directions at the end marks. This activity not only gave a sense of the meter, but also of the meaning, because a change in direction indicates a complete thought. By sending students into the halls with this assignment, Beatrice provided them a sense of ownership of their learning, which students "Loved that because they saw they had some freedom."

. As Beatrice's students learned bits of text, they began to build the performance of a scene. During their study of *Romeo and Juliet*, students utilized their talents to reenact the Capulet ball:

> …we had pie pans that you would get a frozen pie in for their instruments that they brought in. So they had their little band going and wrote a piece. We had a boy that was in the band; he wrote a little piece that was to be played at the ball instead of the theme from *Romeo and Juliet*. They thought that was pretty sappy with the boy standing in the middle. They couldn't imagine a boy wanting to sing that pretty--that was the term. So they made their own little band, and we did that. Everybody wanted to be in the band by the end of the period. So the next we came in and everybody was in the band and it was horrible. We had noise. So, they realized that certain people have certain jobs. And they wanted to go back to the original band at the end.

The students also organized their pie-pan band to perform the funeral procession at the play's end. Again, Beatrice gave ownership of the learning to the students. They not only wrote the music for the scene, but she also allowed them to experiment and decide for themselves what roles they should play.

One of Beatrice's artifacts of her teaching and learning was the student-generated playbill, which reflects her goal of "apply[ing] [the plays] to modern times." In this assignment, students answered the question, "If it were a 2008 movie, what would you want them, your audience walking by the theater, what would you want them to see?" Beatrice was impressed with the varied ways students approached *Romeo and Juliet* which revealed their understanding of the play's universal themes:

> The conflicts in lives of teenagers, it's still there whether it's love or whether it's other portions. One of them mentioned a fight we had in the hall--the fight in the street, in mentioning whether it's a street or whether it's a hall street, or whether it's at home or within you--because we do a lot with conflict. That was really neat how they brought that up. But then the next playbill didn't have anything about conflict. It was all about resolution. And how we deal with problems and if we deal with them in a positive view then there's always a good outcome. And how the two families of Romeo and Juliet, how they actually realized that somewhere along the way they could work together as one, and if they had realized that sooner, life would have been a whole lot easier.

The playbills revealed the students' recognition of the play's complexity, which mirrored the complexities of their own life experiences.

In addition to utilizing performance strategies to teach Shakespeare, Beatrice also adapted them in other genres of literature as well. For example, she used the tableaux exercise (students freeze into a shape to communicate a feeling or emotion) to teach tone in short stories. She highlighted a student's interpretation of the short story, "The Scarlet

Ibis":

> We would have certain stories sometimes that they would need to do. They would be given a little card. "Scarlet Ibis" I know is one. Little Doodle, you know, he was deformed. And so this child had that, the card, and he had to portray the tone of "Scarlet Ibis," and he bent down in a mode of prayer. No one missed what story he was portraying. Everyone knew that that was Doodle. And yet, we look, Doodle's supposed to be the one that's not all there. That really worked well with tone and mood that we had.

This student understood the tone of the story and Doodle's character not only intellectually, but emotionally as well. Furthermore, he communicated that through his body language. Beatrice also utilized the tableaux so that students began with the tableaux and connected it to a story they had read. She organized students into groups of four and played music. Students moved with the music, and when the music stopped, the groups formed a tableau that was a unified whole. Then Beatrice assigned a short story to each group, and the students explained how the tableau represented an aspect of the story.

It is difficult to parse Beatrice's adaptation of performance strategies without talking about her teaching philosophy. During our last night at the Globe in 2005, we participated in the angel card ritual. At the beginning and ending of time together, Chris Stafford asked each participant to pull an angel card, which has a word written on it. The word provided a source of reflection about where we have been, where we are, and where we are going. Beatrice's final word was *transformation*:

> My card last night was *transformation* and if any word, I started out with *humor*, and I do use humor in many different ways and one way is to cover up fear, but another way, the transformation, to go back in my classroom, it will not be taught

> out of a book for us to read line by line. And that was just the greatest feeling of all. And if nothing else, there's millions of things I've learned, it's worth that one thought that it can change and it has to change with me.

Three years later in her quick-write, Beatrice reflected on this statement from 2005: "I know that I am still transformed with the Globe experience, but am still brought back into the reality of high school students and their needs as basic freshmen." Beatrice believed that the entire Shakespeare Lives! experience challenged her previously held beliefs about thinking and learning and recognized the difference in her teaching since her return from the Globe:

> I had always taught plays by assigning parts and having students read aloud. REAL PASSIVE! I am so ashamed; however, being in the mist of experts, there is a certain feeling that doesn't always come with a classroom of students. I know students must be active participants in a lesson . . . .

Beatrice's self-described transformation can be traced, in part, to her most meaningful experience in the program:

> I'm not sure this is the most [meaningful], but this really did impact me. When we were working on the play that we did, *The Tempest*, and we had parts assigned. And we worked on those parts. And it put me in the place of a student again. It was a little different feel because we're used to being in charge. And each of us wanted to do such a good job. And it came down to the, I guess to impress those people who were guiding and leading us because they were experts. And to put myself back in the student role, to know how hard students truly do work and how they want to be successful, too, I appreciated that moment. That after our production was over, how good we felt those wee early morning hours. How good we felt. And I could just see people sitting all over those benches in those seats in the Globe and clapping for us. And there were like three or four different people there and it didn't matter. It really didn't matter. To see a student smile and know that they're happy within themselves, that's all that matters.

As evidenced by Beatrice's description of the pie-pan band, the playbills, and memorization exercises, she had not lost sight of students' perspective. In her quick-write and early in her interview, she expressed her "broken heart" because one of her students dropped out of school with two weeks left in the school year. The fifteen-year-old could not read beyond calling words. Beatrice wrote that "'play' took on a different meaning," about which she elaborated in the interview:

> Where did I fail him? And then going back, and I know that we are reflecting back on Shakespeare Lives! and what a program; and it's just one that you don't ever lose focus of. It is play. But how much are we playing with the lives of students to think that everything happens within four walls, and then when they walk in the classroom they are all on the same level. And then every problem will be fixed. And it makes me very sad to think that that child, literally his education, in his mind, is over. Now will we ever get him back, back here? If he goes for a GED, I don't know if he'll be able to read and comprehend the test, even the directions. How, I just cannot imagine, how he would feel. There's a problem. Nothing replaces a good teacher.

As Beatrice reflected on this student's participation in class, she recounts a "bright moment" when he experienced a "few glimmers of success." Because he was able to learn lines from the play through passing the ball, he gained confidence and emerged as a leader. However, once the study of *Romeo and Juliet* was over, the student disengaged again. Beatrice felt responsibility for his disengagement and a desire to connect authentically with him:

> Now why did I not incorporate activities more that he could feel more successful? That's a fault of mine. And one day I'm just going to have to see him somewhere; I'm going to have to call and say, "I have failed you. ...But you'll be successful in something." I just have to believe that. I just have to believe it.

Here Beatrice expressed a contradiction; she claimed that she didn't "incorporate activities;" yet, as mentioned earlier, she adapted activities to other genres of literature.

During Beatrice's description of this student, she referenced an artifact of her teaching: masks. After students attended school for a few weeks, they created masks "so that they could share a little bit about themselves." The masks, made from paper maché, sport a variety of colors and expressions. Many contained words clipped from magazines and symbols such as a guitar, a cross, or a baseball. The images represented how students want to fill "the dash of the date you're born and the date that you die" because how one lives "makes all the difference." On the outside of the masks, students illustrated the faces that they show to the world; the inside of the masks represented their true selves. Beatrice, in both 2005 and 2008, acknowledged that humor was her mask that she used to cover up her fear. "I think I've made that comment before that I cover a lot with humor. Because it makes us look weak when we get down in the trenches so you cover up with humor and you move on."

The mask served another purpose as students began their study of *Romeo and Juliet*. They used the masks in their performance of the Capulet ball. Beatrice saw how the student who later dropped out

> saw [himself] as being covered up from what's inside, and this boy certainly has held very much inside, that he realized that he could come alive because he is hiding his true identity, thinking it was hidden in that mask. . . . But he put that mask on and he became somebody. He took it off and he just wilted--wilted back into that seat to wait for the bell to ring.

The mask symbolized one aspect of Beatrice's teaching philosophy: literature can

provide the bridge for her to connect with students in an authentic way as well as for students to connect with each other and with what is important in their lives.

> And they see that Romeo and Juliet, they had on masks, but they also saw that the masks were removed when the two lovers saw each other. When you know that you've done something good, it's ok for you to take that mask down. And at the end of the exercise, every single mask was removed from their faces. So that made me feel good about that. There are high moments. There are a few high moments.

Beatrice described moments when students connected with each other and with what was important in their lives. One occurred during a "pass the note" activity that she adapted from an activity at the Globe. During the activity, the session leader gave each participant a line from a play and the participant then moved to communicate the meaning and tone of the line. Beatrice thought, "This would be neat to give a line and see how students would complete the line. This gave me the opportunity to actually use an extension of the idea. It worked." Beatrice instructed each student to write one line, and then pass the note to another student who added a line, and so on.

> . . . [O]ne girl started and her very first sentence was, "Life sucks." But it came back around, and as we got to the end, first is going to be there, life sucks but look at the alternative. It can always be a little bit worse; it can always turn to a negative so we do have to look at the bright side. The interesting thing was we had a senior, right after she had done the-- in fact, we read all of them out. . . --a student, a senior, to commit suicide. And um, left here one afternoon and the next day the students were just very, very sad. And one of the girls came in and she said, "But for him, that was his resolution. For Romeo and Juliet that was their resolution." And she said, "We, again, we have to be noticeable of our peers. And see what we can do to make their life better instead of making their life worse with the comments and actions that we do." So we use that as another teaching tool through that journal entry writing that really helps students realize we are more alike than we are different. Even with what we hold inside instead of

bringing out. We had that, goodness sakes.

The pass the note exercise became an authentic learning experience for Beatrice's students because in their effort to make sense of a classmate's suicide, they voiced their understanding that they need to connect with one another. In this instance, the learning experience provided potential for the students' transformative learning because the literature and writing activity allowed students to connect with each others' inner lives (Dirkx, Mezirow & Cranton, 2006; Tolliver and Tisdale, 2006).

Another activity, an eye contact exercise, not only provided the learning opportunity to understand the literary term *tone*, but also the opportunity for students to authentically connect with each other. In this exercise, students moved about the room, but were not allowed to speak. As they came in contact with each other, they looked each other in the eyes. Beatrice writes,

> [O]ne student commented later that they touched through their heart in this exercise. Isn't that really neat? Students found that eyes speak volumes when tone is concerned, but more than that...the facial expressions (tight jaw, rubbing of lips, blinking of eyes, etc.). This brought us in on the fact that people can speak without saying a word.....which is what love is all about. It becomes more of a feeling than an expression. Students realized that tone can be what is felt in the heart.

The activity with the elements (earth, water, fire, air) provided Beatrice with yet another means to connect with students. She connected the elements to a game the students play: rock, paper, scissors. "You know how they do paper, rocks, scissors? That's how they see them, ok who's going to win here." However, Beatrice turned the

elements into an explanation to students of another important feature of her teaching philosophy: everyone can serve an important purpose.

> But all the elements are necessary and they're needed. So each student has their place, no matter which element they are. Can fire burn up dust? Well, the dust can put out the fire. They started realizing through our science classes that every element is important. That you're going to burn down, you're going to end up with dust. So have you destroyed the dust? Oh no. You haven't destroyed dust. So that every student is going to be um... be valuable and be independent in their own way, but they still have a purpose when it comes to society and they're being productive.

Like the character Hamlet, Beatrice admired the "quintessence of dust" in her students, in their gifts, and in their possibilities. After three years, she saw the fruition of learning in the group of students she took to the North Carolina School of the Arts. In 2005, Beatrice described the success she had with ninth grade students who had not passed the eighth grade reading competency:

> I'm thinking here are kids, they cannot read, they did cut the script, they edited it all except for a just few, we had to go back, they left a little bit more than I did. And for students to come up and to know that they didn't have to read, but yet they still knew a play. For them it was just fabulous, it was absolutely fabulous. And it gave new meaning to any play that was performed is better than every play that was read. And they will tell you that today. If they have remembered anything else this year, they will remember that phrase. And they've done wonderful. And for them to come today in front of these other students, I just can't tell you how much it means to me to have the opportunity to bring them because we wouldn't have gotten that opportunity otherwise.

In 2008, Beatrice still ranked the experience with these students as her proudest teaching moment. At the time of the interview, these students finished their junior year, and Beatrice noted transformations in their interactions with others and in their goals.

One student, whom Beatrice described as “a farmer at heart, he's very quiet, says he loves to mingle with the cattle, he does,” felt that he had “done good” in his performance at UNCSA. Although he did not talk about his performance experience back in 2005, Beatrice claimed, “But now you'll see him in the hall when we're working on different activities going down to the English hall here. You'll see him leading--he'll be a senior next year--leading the other students in activities.” The quiet farmer planned to continue his education at the community college.

Another student, who was a freshman in 2005, also shared a positive experience after the festival. Beatrice recounted, “She was afraid people would laugh at her. And when we came back, she was the one who said, ‘They clapped for me.’” Beatrice believed that taking this student out of “the four walls” of the classroom to a college campus helped her to see new possibilities for her life.

> She's going to cosmetology school. She didn't want to do anything but get married and have babies. I just can't help but think that day, the impact. Does that make me proud? You bet it does. You bet it does.

Just as the student Beatrice described above, she, too, expressed new career goals. In 2005, her goal was to teach Shakespeare using the performance techniques rather than “out of a book for us to read line by line . . . And if nothing else, there’s millions of things I’ve learned, it’s worth that one thought that it can change and it has to change with me.” Beatrice’s goal expanded, just as her teaching expanded. At the time of the interview, she was leaving her classroom to become the literacy facilitator in her school.

In this role, she will work with her colleagues in enhancing student literacy across content areas:

> Speaking of the transformation...my new position will be working with teachers to make them better teachers and to try target these students who we need to still be here and know that they're valued. And to let them know that sometimes, more times than not, I put on the mask, too. But I need to share with them my weaknesses and that we all have them so that we feel more alike than different. If they don't know I care, they're not going to care one bit what I have to say.

Beatrice believed that the sense of play can be applied to all subject areas, particularly in subjects where students have to remember facts and information. "We're going to be working across the curriculum as we come in. I can't think of any of them that wouldn't work. And that's going to be a huge focus for me."

Dirkx (personal communication, June 27, 2008) thinks "you can find traces or seeds of transformation in the person's life story." Although the scope of this research does not trace Beatrice's life story, the data uncovered one seed of an authentic connection with students that existed before her Shakespeare Lives! experience. Each year, Beatrice presented every senior whom she taught with a package. The package contained a memento, perhaps something they left behind in her classroom such as a note or a well-written essay. Along with this memento, Beatrice wrote a note to the individual student. This desire to connect with students along with the support she received from her colleagues (Two of her colleagues also participated in the Shakespeare Lives! program) and from her administrators set her on the path of creating a classroom where transformative learning could take place. When Beatrice's administrator asked what her students are doing in the halls, she replied, "'Just watch, they're going to show you.

They're going to show you.' But he will join right in." Her administrator recognized that she actively engaged students with the curriculum standards.

What pedagogical changes made three years ago does the teacher continue to use?

Beatrice stated in 2005 and in 2008 that the most significant pedagogical change concerns her approach to Shakespeare's text. She no longer assigned students to read passively assigned roles from the play "line by line." Instead, she engaged students by cutting the text so that students could learn meaning through physical exercises. Once students accessed the meaning, they made text-to-self connections. Beatrice encouraged students to make personal connections with the literature as evidenced by the students' discussion of Romeo's and Juliet's suicide and a fellow student's. Other strategies that Beatrice continued to use included learning bits of text using a beach ball and the elements exercise. Beatrice focused on student responses to the strategies, "They absolutely loved it." As she recounted her most meaningful experience, assuming the role of the student in her experience in the Globe, she realized that "[t]o see a student smile and know that they're happy within themselves, that's all that matters." Her students experienced success with Shakespeare and other literature.

What professional changes does the teacher describe?

Beatrice became what Cranton (1998) calls a “reformist teacher,” one who becomes a co-learner with the students who shares in the decision-making process over learning. She allowed her students to take ownership of their learning by making decisions concerning performance. In addition, she connected with students through the heart, just as she describes her Shakespearean namesake. Only time will tell if Beatrice will also reform her school institution in her efforts to work with teachers to continue the transformational learning process:

> Now that I am moving out of my own classroom, the process will not stop. I will now be able to share with teachers of every curriculum the importance of "play" and help them connect this concept to their activities.

What personal changes does the teacher describe?

Beatrice did not describe how she changed personally as a result of her Shakespeare Lives! experience.

In what ways are the changes teachers attributed to Shakespeare Lives! sustained three years after their professional development experience and in what ways are the changes transformative?

In 2005, Beatrice described the thrill of playing the role of the drunk Stephano on the Globe stage:

> I've never been drunk in my life, and yet I was drunk last night, but it was a different type of drunk. It was a drunk on the Shakespeare, the feeling of the Globe, (static) that ran off my body and that was ok. That's acceptable and for other people to feel that passion there and it has to go back into the classroom and it will.

Beatrice's transcript uncoverd one Shulman's (1997) principles for enduring learning: passion. She carried that passion back to her classroom and shared it with her ninth grade students who had not passed the eighth grade reading competency test. Her students enjoyed the drama activities and cut the text themselves. Based on her anecdotal evidence, she believed that these students' performance at NCSA showed them another way of seeing the world and its possibilities. She believed that these students are considering post-secondary education because of that experience.

In 2005, Beatrice stated that "the change has to begin with me." Perhaps the most compelling evidence that her experience in the Shakespeare Lives! program was transformative is that some aspects of her teaching were conducive for transformative learning. Dirkx, Mezirow & Cranton (2006) pose the question, "How do the words of the text, of what we read, hear, see or experience become part of who we are, lend meaning to our lives, illuminate those aspects of our lives shrouded in darkness or mystery?" The answer to this question rests in communicating the connections we make between text and selves. Because Beatrice engaged students in communicative learning (Mezirow 1991, 1997), her ninth grade students engaged in a genuine dialogue about one of life's great mysteries, death. By facilitating this dialogue, Beatrice allowed her students to engage in "grief work" (Dirkx, 2001). In addition with the eye contact exercise, students

participated in somatic learning which helped them to connect to each others' spirits as one student commented, "We touched through our hearts."

Dirkx (personal communication, June 27, 2008) believes that transformation is like a journey in that it is "ongoing and lifelong" marked by period of "inflation and deflation." Beatrice described the "proudest moments" when students experience success along with her disappointments such as the student who dropped out. Above all, for Beatrice, was student engagement with the literature, with each other and with their own lives. Beatrice summed up her philosophy in her final follow-up email:

> I know students must be active participants in a lesson, and I still hope one day that every student will share the passion I do about literature and how it connects to our lives. It will come, maybe not every student, but the majority. I'll be realistic!!

Beatrice's changes in not only her pedagogy, but also in her teaching philosophy indicated that she experienced professional transformation.

Teacher 3: Cordelia

Cordelia entered the Shakespeare Lives! program after her third year of teaching. She learned about the program from the local arts council, who "pitched it as a free trip to the Globe, so who wouldn't apply!" Since participating in the program, Cordelia gained tenure and experienced a huge life change by becoming a mother. In addition, she was assuming leadership as the senior project coordinator at her school. She selected her pseudonym because "as I have two sisters, (though they are no Regan or Goneril) but I

am my daddy's favorite (don't tell anyone☺.)" Interestingly, Cordelia did not select her favorite character, Mercutio from *Romeo and Juliet* as her pseudonym. She favored Mercutio because "he's so enigmatic." In 2005, Cordelia noted that the Shakespeare Lives! experience "had such a profound effect on me as a person and as a teacher." Although she had difficulty at the time articulating those effects, she noted that she was more conscious of her posture and how that affected her voice. She also believed that the strategies actively engaged her students.

For Cordelia, understanding character and Shakespeare's language were two of the most important curricular goals. The strategies that she continued to use reflect her curricular goals. In 2005, Cordelia noted that the archetypes exercise (students move about the room as a royal, a soldier, a lover or a trickster) helped students understand character.

> We did a lot of archetypes and stuff with the kids and the characters. Not being, not coming from a drama background, the hardest thing with the kids was keeping them in character and having them show emotion and those kind of things, you know to be a ninth grader is totally not cool in front of your peers.

Currently, Cordelia no longer used the archetype exercise, but references archetypes as "an idea."

Like Beatrice, Cordelia shared a mask as an artifact of her teaching. The mask, covered in white feathers, hung in her room. Thin, glittering, gold sticks spiraled out from the feathers, and the cut-out eyes and mouth were rimmed in gold as well. A student created the mask to represent the character Mercutio.

> I usually do a different kind of project at the end of *Romeo and Juliet* with my freshmen. And that's the mask project where they have to um, they can, they have to pick one of the characters and they have to make a mask that sort of represents that character. And then we have a day when they bring their masks in and they have a write-up that sort of explains the symbolism. I just thought that one was really cool, so I kept it.

With this assignment, students demonstrated understanding of two literary terms, symbolism and characterization.

Another student-generated product, a hand puppet, served as an artifact for Cordelia's teaching, which also reflected her curricular goal, understanding Shakespeare's language. "[T]he sound of the lines and the words are so important to me, so I just like, I get excited about a cool line of Shakespeare. And that's something I would really like to get across."

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> [A] group of girls did a *Romeo and Juliet* puppet show and these were their hand puppets. And they did with the play, they had to do real lines. So it was a 32-second *Romeo and Juliet*, which is something I do with Macbeth, too. And they have to pick, you know, 20-25 that capture the sense of the play. And they do 32-second, we have competitions to see who can do the play the fastest. They use actual lines so there's some text cutting.

Prior to 2005, Cordelia taught Shakespeare by assigning students to read every word in the text book. She said that she would not "torture" her students any more:

> I discovered I was a text-obsessed teacher and will no longer be so. So that's the big thing that I'm taking back. That I don't have to use every last word, and I have all these resources to choose from now to make it more exciting without using all the words, which was not accessible and exciting.

The puppet artifacts revealed that students actively rather than passively engaged with the plays. As students made the textual cuts, they demonstrated understanding of the text. Cordelia maintained, "I have always said the realization that I don't have to use every word of a Shakespeare text in order to do it justice is the most important realization I had with Shakespeare Lives." Her realization bore out in her teaching practice.

Cordelia recalled a strategy introduced by Adam Coleman, Globe practitioner, that lead her to this realization.

> I don't know if you'll remember, but one day we were in one of the rooms in the Globe. And this guy came in, I can't even remember his name, he came in and sort of did the fight scene in *Romeo and Juliet*. And um...with the, he had like a drum and a rattley thing. We make a big deal out of that fight scene. I think, to me, that was one of the coolest things that we did when we were there, I got the most excited about, so I do that with my kids.

In Coleman's workshop, he focused on the opening scene in *Romeo and Juliet*. In this exercise, each person receives a line, and reads it in a circle, first whispering, then in a normal voice. During the next reading, the speaker points to the person who spoke before. The next addition is thumping a piece of paper as the participant speaks the line. Cordelia used this strategy with the fight scene between Romeo and Tybalt.

> With the fight scene, we do the lines first. I give them like, everybody gets their line first. And then we practice saying the lines like with different, you know, with different emotions. I encourage them to do like one line at a time. We'll do it this way; try something different so that they get used to their line. And then, we put them together with the rhythm stuff. . . . Then we split them in half and then they do the lines, and I guess we act the scene out kind of opposite of each other.

Cordelia utilized bits of text in both the puppet show projects and the fight scene to lead

students to performance.

Cordelia used a drum to help students move to rhythm of the lines not only with *Romeo and Juliet*, but with *Macbeth* as well. Rather than using the script in the textbook, Cordelia provided her students with a cut script and a few props.

> We have some like, prop things that we use. And we either do the...*Macbeth* is in their textbook, but I don't use that at all. We have the cut text that we make copies of. We will either do a scene standing with the props, or we'll, I'll break them up and give them each a scene their going to act out or explain. . . . We have, they're in the hallway. Of course, I have the witches' hats. And then I have the apparitions. I have little paper--they're not extravagant props--I have paper plates that have images of the apparitions so they can use those to be the apparitions. We have the Macbeth mullet and the Banquo 'fro. If you're Banquo, you have to wear the 'fro and if you're Macbeth, you have to wear the mullet.

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Not only did Cordelia use performance strategies to teach Shakespeare, she also found the strategies helpful in teaching other genres and parts of speech. When Cordelia returned to the classroom in 2005, she adapted some of the activities to other literature:

> I'm still using, I've used a lot of the activities in my other classes...you know, other than just using them with plays. We've used the, uh, character games. We have somebody go out of the room and you pick their character and then you treat them as you would treat that character and then have them guess who they were. I did that on Friday with my basic juniors with *Of Mice and Men*. They were having a hard time keeping the characters straight so we did that and I think it really helped. So, all that kind of stuff I can use in all my classes. That's been really helpful. We'll continue to do that.

Three years later, Cordelia continued to utilize this game.

Another adaptation, her students "built a boat" when studying *The Odyssey*. This exercise, introduced by Globe practitioner Jo Howarth to recreate the opening scene of *The Tempest*, engages students in swabbing the deck, climbing the rigging, hoisting the

sail, and building a boat. Functioning as an ensemble, the group moves port, starboard, fore, and aft to mimic a boat in the stormy sea. Howarth then adds bits of text from the opening scene. Although Cordelia could not recall the details, she shared how she used the exercise:

> I did a modified version of that ship game when we did *The Odyssey* because there's that scene in *The Odyssey*--this was a couple of years ago; I didn't do *The Odyssey* this year; it was the year before. I did the scene where um...I can't remember what I did it with. I either did it with the Laestrgons when all of his ships were destroyed, or I did it with um...his, he's on the raft at the end with Poseidon. But we did kind of the, tried to do a modified version of the ship game with *The Odyssey*. . . . And I always forget the directions, and my kids love to remind be because they know that kind of stuff like, "Which one's port? I don't remember."

Cordelia found another strategy, visualization, a useful tool in teaching imagery and mood in the short story “The Most Dangerous Game.”

> [A]t the very beginning of "The Most Dangerous Game," um...it totally freaks them out because this is like the second day of school. And they think, who is this crazy woman? Because we turn out all the lights, and I make them move their desks out of the way. "The Most Dangerous Game," I'm sure you know, is like set in the Caribbean Sea and it starts out in the middle of the night. And so we do the like um... kind of sensory stuff where they walk around, and you know, try to envision what's the line from the, there's a great line in the story about like "the night was like moist, black velvet." And we talk about that and walk around and then close your eyes. Imagine it's really, really hot or imagine you're on a boat and we do the side-to-side stuff. So, I guess, I don't know what you call that; I always call it the sensory stuff. Because it also really helps when you try to teach imagery: you remember when we talked about the night was heavy, what sense is that? So we do that at the beginning of "Most Dangerous Game."

The “side-to-side stuff” is reminiscent of the build a boat exercise.

Cordelia also used a somantic strategy from Howarth to teach the parts of speech

in grammar.

> And I actually do um...I have done, I didn't do it this semester. I have done, like the sentences, like give them sentences and have them do...one of the things we had to do was pick the verb out of the sentence and be that verb or act that verb. We've done that. I do that to teach verbs and adverbs especially and nouns.

In Howarth's version of this exercise, she gives each student a number and a slip of paper. Each student writes an active verb on the slip of paper, which Howarth collects. The students have to perform the action such as, "Number 2 dances with number 17."

Cordelia noted several times that she "didn't do it this semester," or "I did it a couple of years ago," which indicates that she did not employ a particular strategy consistently. However, another artifact of her teaching, her "Wooden O book bag" contained her notes from 2005, newspapers of the July 7 subway bombings, photographs, and playbills.

> You know, every once in a while I take a look at those and think I totally forgot that we did that. Actually the word thing, the acting out, the freezing on the verb or freezing on the noun. I'd totally forgotten we'd done that. And I saw that when you sent it, I was like oh, I remember I was going to do that with grammar, I think I should try that.

Cordelia also used items in her bag for new ideas to teach literature.

> We'll be at the end of something, I'll just finished *Speak* with my freshmen, what's something cool I can do with *Speak*? And I'll go look in my Wooden O bag. Wonder what I have in here that would be fun?

The bag provided Cordelia a continued resource for teaching ideas. It also served as a reminder of her time in London. She found that sharing her experiences brought her students closer to London and the Globe.

> I use the experience, my personal experience perhaps just as much as I do sort of the skills that I picked up when I'm talking about Shakespeare. Because that ...I have all the pictures and the playbills and it's so much, you can tell they're so much more interested in hearing about what the Globe is like and what the Globe was like back then when I can tell them, "And when I was there..." You know so the making it, because it's a reality for me and I can pass it on to them, I really do feel like I can tell a difference when I go over Elizabethan England four years ago as when I go over it now. And I show them all the pictures from the plays, you know talk about, and I show them the picture where we're leaning on the stage like this, and it's me and Ms. _____ who they, you know they all know Ms. _____, that kind of, the sort of reality that it's a reality for me, and I pass that on to them is really cool. And uh, of course, being there at the time that we were there and talking about that. And that comes up, you know because when we do Shakespeare they know that I was there. And talking about other things, ...and you kind of, we talk about themes or having discussion about anything that...about fear or we talk about terrorism, I have that kind of life experience to bank on, and that...I use that also.

Cordelia referenced the terrorist attacks in London on July 7, 2005. During the attacks, she was participating in the Shakespeare Rally with her partner, Beatrice. The purpose of the rally was two-fold, to examine various images of Shakespeare throughout London and to learn how to navigate the tube (subway) system while seeing the city. By sharing her personal experiences in London, Cordelia demonstrated a willingness to share part of herself with her students.

While Cordelia had no trouble sharing her experiences with her students, in 2005, she anticipated “a hostile reaction to the tactics” from her colleagues. She elaborated in the following way:

> We have a, I expect it from two sources. The chair of our department is very, her favorite phrase is, "I run a tight ship." And she really does. You know, no, don't get out of your desks, don't move, don't breathe wrong. You know, we're going to work grammar and we're going to write, and we're going to read this and it's not fun and that's what it's about. And that's what school is about. It's not fun, but you learn and that is her philosophy. And anything that doesn't fit into that is wasting time. And that's exactly how she's going to view it—it's just a waste of time. And I don't think, maybe she'll see the results and will come around, but I doubt it. (laughs) I mean to be honest, she's just really set in her ways and I love her dearly, but that's just how she is. And our principal, we have a new principal, so I don't know him particularly well, but [Beatrice] has worked with him before, and um, just in the few experiences I've had with him, it's all about testing. It's what are you doing to get ready for this test? What are you doing to help with the 10th grade writing test and the 11th grade SAT writing and the Senior Project? How does this directly affect that? And, I think he will see it as a waste of time. If he comes by my classroom and we're you know, up out of our desks like we're playing a game and he doesn't see the immediate impact on the test scores, he's going to think, oh, what are they doing in there? They're wasting time. So, and an explanation may or may not help.

Three years later, Cordelia described her department chair's response in a similar way:

> Cordelia: …if the chair of my department saw it, she would be like, "What in the world are you doing?" But...
> LNM: Is that the same person who was chair?
> Cordelia: Yes. Just, you know, she's definitely a nose-to-the-grindstone uh, in-your-seat-do-more-grammar kind of philosophy.
> LNM: So she doesn't have any idea of what you're doing?
> Cordelia: Oh no, no, no. (laughs) And she would have no...I'm, she's, I love her, I absolutely adore her, but she would have no patience for it and no desire to understand. And absolutely no way to convince her that there's any kind of ...worthwhile…anything worthwhile in it at all.

Although Cordelia had a positive relationship with her department chair ("I absolutely adore her"), they had different teaching philosophies and styles. Cordelia found worth in "fun" activities to engage students in learning.

In 2005, Cordelia anticipated that her then-new administrator's primary concern would be testing and that he would perceive students participating in activities out of their seats as a "waste of time." Since that time, she has learned that her administrator

> is big on engagement--on students being engaged, and I think that he would appreciate any time that they are not ...um... laying down, head down on the desk. That's his kind of big thing. Authentic engagement with the students. But then on the flip side, he's kind of that administration paradox where he wants students to be engaged and also very successful on the end-of-course tests. So I think are automatically a little wary of what exactly are they doing? How exactly are they learning something now? But...he's a big fan of like critical thinking questions and that kind of stuff and I don't know that...I've never discussed, you know...Shakespeare Lives! in particular or the philosophy behind it and particularly...he and I have not and I don't know if he and [Beatrice] have either.

Cordelia's response indicated a concern for how authority figures, department chair and administrator, perceive her teaching methods. Consequently, she felt uncomfortable utilizing space outside of her classroom.

> The only other space, um, we have like a lobby. And we have, you know, kind of a main entrance. I think when we did this before, like, Beatrice and I may have mentioned at the time, our principal at the time, would have had, you know, a cardiac arrest if he'd seen us swabbing the deck in the middle of the lobby. I think our principal now would not be as traumatized by it. So I guess we could go down to the commons area. Of course, any time you get them...then they're not just performing for the kids in the class; it's anybody who walks by, or the seniors and gym class can see them. And they're going to be ... you know, embarrassed or whatever. I wish we, I feel like the auditorium is the natural place to do it; it's just such a high need area.

In a follow-up email, I asked Cordelia, "Do you feel that you have sufficient support to utilize Shakespeare Lives! strategies with your students?" Her response echoed comments in her interview:

> I have said since my first early experiences with Shakespeare Lives that space is a concern at my school. I have a nice room but with 30 desks in here; it is tight and limiting. And, I have always felt like I couldn't really use any of the open spaces in the school like the lobby or the auditorium, either because they are occupied by other groups or because I would get weird looks or comments from my administration. Though I haven't had any real experience with my administration to justify that fear, it is just a general feeling I get from comments that have been made about classroom management and engagement, as well as time on task for learning and emphasis on tested materials. I guess these are the same concerns of any administration.

Cordelia used the word *fear* to describe her concern over her administrator's reaction to the strategies. Her fear seemed rooted in her concern about "classroom management and engagement" as well as an "emphasis on tested materials." Interestingly, her feelings contrast with her colleague Beatrice's, who felt comfortable in taking her students outside the classroom and found that the principal "joins right in." Although Cordelia highlighted ways she utilized Shakespeare Lives! strategies to teach students to analyze characterization and imagery (skills that are tested by the state), she did not clearly articulate how the performance strategies aided in meeting goals for her courses or how they "directly affected" test scores. Cordelia appeared conflicted between her desire to engage her students in performance strategies and her perceptions of authority figures, namely her department chair and administrator.

Cordelia related three meaningful experiences with Shakespeare Lives! The first she shared was the midnight performance on the Globe stage.

> Cordelia: Most meaningful... Personally, I would say, um, the performance because it was at night. And everything is cooler at night. And being on the stage, or one of the really late night practices. Being on the stage with the open air and stars, and just...personally, that was definitely... the thing that I hold on to.

> Because I can think about that and I can feel that way exactly.
> LNM: Oh really?
> Cordelia: That kind of nostalgia, that you know, like some...this is really cheesy. When you are experiencing something and you know that it's significant; I will remember this. And that's definitely one of those ...and...I guess it's sister moment was walking on the stage for the first time. That was really cool. . . .

Performing on the Globe stage affected Cordelia so profoundly that she can recapture the feelings of those moments.

> LNM: You said something and I didn't quite catch it, but you were talking about, I think, about that moment and I can still feel that moment with nostalgia, and I can still feel it. Um...how do you use that moment or...obviously if it's so real that you can still go back to that moment and feel that same thing, when and how do you do that?
> Cordelia: I don't know. That's another good kind of abstract question. ...I don't know...that I use it particularly, I guess I just enjoy it. I think about, like when I teach um...Wordsworth and we talk about like, you know, emotions recollected in tranquility and all that kind of stuff, that is one of those kind of moments that I think about. When we talk about isn't there some event that you could think about or a time that you did something and you remember that, and you remember how that feels. Maybe you're bummed about something and that makes you feel better. That's what Wordsworth is talking about. You know, so, I guess that kind of idea.

Cordelia shared that she finds thinking of the time on the stage "makes her feel better" and increased her desire to revisit London.

Another meaningful experience that Cordelia highlighted was the visit to Gosden House. On the last day in London, the group visited a residential school in Guildford. The school, located in a manor house, serves children with conditions such as Downs Syndrome and autism. Globe practitioners, including Adam Coleman, worked for several weeks with the children on a production of *Hamlet*. Each class performed a scene; every child participated in the performance. Cordelia described the experience as follows.

> Gosden House brought us all to tears. It was just such a beautiful display of teaching at its most meaningful. It reminded me anyway of the reason I went into teaching in the first place, and because it was a play and a Shakespeare play, they were displaying, it reminded me of why I went into teaching high school English.

Both of Cordelia's meaningful experiences affected her on a personal level, which in turn, affected her teaching practice.

Seeing "teaching at its most meaningful" connected to Cordelia's third meaningful experience, which was "seeing my kids perform when we did the play at School of the Arts." She continued with why this was so:

> I really enjoyed that. And those kids and, a couple of the kids who did that were not kids I thought would have enjoyed it or would have done it. One of them had hardly ever been out of Ashe County. And ...I was really surprised that he went and was really, really glad that he did. That was a cool moment for me.

Cordelia continued that these students often speak to her in the hallways, indicating that she and her students forged a relationship.

In 2005, Cordelia not only found her Shakespeare Lives! experience professionally meaningful, she described personal changes as well:

> I kind of feel rejuvenated as a person, too and … I don't, I'm a big crier in movies and things, but for some reason I've never really cried at a play like in a theatre. I did at all three; those plays made me cry. So, it's just really a very moving experience. And also, it sounds dumb, but like I sit up straighter; I have better posture (laughs) because of you know, working with Glynnie um, Alexander technique, and all that stuff. You know, the tiny bits and pieces about myself that I feel better about and generally stronger about certain things and I think that's great.

Three years later, Cordelia referenced the elements workshop with Glynn MacDonald, and how it affected her reading:

> Cordelia: There's so many things I'm really nostalgic about, I think. Um...that will come to me at times that have absolutely nothing to do with Shakespeare or teaching, you know, just...
> LNM: Can you give me an example?
> Cordelia: ...I guess, in my own...reading. I'll think about a person being sort of an element, like a character in a book. Or I guess, you know, if I'm watching TV, and I can see it maybe in an actor--she's trying to be fire and she's not pulling it off (laughs). She's the water. Um. So I guess, you know, situations like that I can see it in characters.

Cordelia used the word *nostalgia* several times during the interview to describe not only her time on the Globe stage, but also to describe her experiences with Glynn MacDonald and the other participants. Cordelia's nostalgia was more than sentimental; it reflected a desire to maintain the feelings she experienced during her time in London.

The context of the Globe Theatre proved to be the most powerful aspect of Cordelia's Shakespeare Lives! experience. In 2005, Cordelia indicated that the experience in London was secondary to the place:

> . . .this experience has had such a profound impact on me as a person and as a teacher. And trying to explain to somebody who doesn't understand, who has, you know, an idea of what staff development is like, you know, they'll think, oh, you had a trip to London; that must have been great. And it was great being in London, but this experience in the ghetto would have been great, you know? It was just the experience was such much more important than where it was, other than the Globe.

However, the place of the Globe proved to be of great significance to Cordelia as she recalls in 2008. When asked if she still felt "the experience in the ghetto would be great,"

she responded, “If the Globe was in the ghetto. . . But being in that building was so important to me.” For Cordelia, the Globe embodied “three essential dimensions: openness, boundaries, and an air of hospitality” (Palmer 1993, p. 71).

Tied to the context are the people with whom Cordelia shared the experience:

> I also feel so nostalgic about the people with whom I shared this experience. Even though I have not spoken to or heard from some of them in a couple of years, I can still picture their faces and recall their names and even some of their lines from the play! I do not believe I can say the same for other staff development opportunities I have had.

Again, Cordelia uses the word *nostalgia*, suggesting that the relationships Cordelia forged remain significant, even though she has not maintained contact. The relationships harken back to what she wrote in her final reflection for the Globe: “I really felt like part of something.”

In her interviews in 2005 and 2008, as well as in the follow-up email, Cordelia made reference that Shakespeare Lives! was not a typical professional development activity:

> It still seems so strange to see Shakespeare Lives! referred to as staff development. It is not even on the same plane as any other staff development I have ever been to. It really was a life experience, especially for someone who loves Shakespeare like I do.

Cordelia repeated the word *real* several times to describe Shakespeare Lives!, unlike her description of other professional development experiences:

> I guess you think of staff development as being something, you know a workshop that you go to, and you go over something they want to implement in your school system or some skill that they want, you know, teachers to have or information that they want you to have, which is, I'm sure all of those things.

Because Cordelia's Shakespeare Lives! experience was so different from other professional development experiences, she did not include it on her staff development report because "It [Shakespeare Lives!] is not even in the same vein of reality, the other things that I've been to."

Making learning "real" and "exciting," one of Cordelia's goals for her students, strongly connected to her teaching philosophy. She wanted her students to gain

> An appreciation, I want them to get an appreciation for the language. I find that to be um, that's something that I really hope that they can get out of it. And also just the...trying to make, you know, that Shakespeare can be fun and it can be exciting and you can understand it. And that's, that's exciting. And I think that there's, I think you do hit those deeper, kind of critical thinking skills in there also, even though you are not asking them to answer questions or having them write responses. I think they still are...it does cause or forces them to think about things. I hope it does anyways.

Cordelia recounted an instance when her students understood the language of one of Shakespeare's sonnets.

> And I had this kid named _____ sitting in the back. And he's eighteen and he's really big and he's always got his first responder radio on his side turned up. He did his senior project on fire fighting, you know. And he was bouncing in his chair, like couldn't contain himself 'cause he was so excited. He's like, "I get this. I get what's going on." I was like "oooh, so much fun."

This anecdote revealed the engagement and excitement felt by teacher and student alike.

What pedagogical changes made three years ago does the teacher continue to use?

Cordelia shared many of the strategies she has utilized in the past three years, although other than the visualization exercise, she has not used them all consistently. Cordelia engaged in what Mezirow (1991) calls "'praxis,' the creative implementation of a purpose" (p. 12). Cordelia's purpose is to make literature engaging and real for her students. She returned to her "Wooden O" bag periodically and looks for strategies that "might be fun." She then reshaped the strategy in a new way to teach literature in addition to Shakespeare such as Connell's short story "The Most Dangerous Game" and Steinbeck's *Of Mice and Men*. Cordelia gave ownership of the most important realization from her experience, text-cutting, to her students. Students cut plays for puppet shows and scene performances.

Cordelia contended that the strategies are "worthwhile" because the students become more engaged with literature, rather than feeling "tortured." She found that the skills and strategies she gained from Shakespeare Lives! made "the literature so much more real for me, and that means I can try and make it real for my students, and I find that students respond to that." In addition, Cordelia found that the students experienced excitement and fun. The strategies and skills she gained aided her in reaching her goal of fostering an appreciation of Shakespeare's language in her students.

What professional changes does the teacher describe?

While Cordelia continued to use and adapts Shakespeare Lives! strategies, she did not describe any philosophical changes in her teaching.

What personal changes does the teacher describe?

The feelings Cordelia felt at the Globe Theater were just as real to her three years later. The time was so significant to her that she can recall the stars, faces, and voices during the midnight performance on the stage. Her repeated use of the word *nostalgia* related a wistfulness to return to London. In 2005, Cordelia described personal changes in "the tiny bits and pieces about myself that I feel better about and generally stronger about certain things." However, at that time, she did not expound upon those changes. Cordelia's experience in MacDonald's elements workshop influences her personal reading. In 2008, she made few references to profound personal changes.

In what ways are the changes the teacher attributed to Shakespeare Lives! sustained three years later, and in what ways are the changes transformative?

In 2005, Cordelia wrote in her final reflection that "the experience has enlightened my teaching and my life with a profundity that could not have been anticipated." The nostalgia she felt in 2008 indicated a desire to maintain that "profundity." However, Cordelia's initial concern over how authority figures, namely the English department chair and the administrator, would react to her new teaching style remained three years later. She did not take her students outside of the classroom for

activities, and did not believe she could convince her department chair that the strategies were "worthwhile." In fact, she used the word *fear* to describe her concern. Her word choice connects to Palmer's (2003) observation, "I have seen the price we pay for a system so fearful of soulful things…dispensing data at the expense of meaning" (p. 379). Although Cordelia admitted that she had not "had any real experience with [her] administration to justify that fear," she felt that way because of "comments that have been made about classroom management and engagement, as well as time on task for learning and emphasis on tested materials."

Cordelia's response to the final interview question (Is there a question that I should have asked, but didn't?) revealed her concern about sustainability:

> I do have like a long-term...I worry that as I ....the farther I get from the London experience, and I haven't been very good about going to any of the follow-up workshop kind of things, the less that I will do it in class. 'Cause I already know that I did less this year than I did last year. So. . . you know, I need to be better about doing kind of the...rejuvenating things, like going down on those, but since Evie was born, Saturday is sacred you know. It's the only, one of only the two days I get to spend with my kid, and I can't ever face the concept of spending eight hours doing something else. So you know. ...So I guess like, the long-term sustainability in my classroom personally is a concern that I have.

Naturally, Cordelia's priorities changed with the birth of her daughter. She expressed a need to participate in "rejuvenating things" and worried that she may stop using performance strategies. When asked why, she responded:

> Because it's easier to let them sit in their desks and read or you know, it's not more effective and it's definitely not more fun, um, but it can be easier. And the farther you get away from that, you know, the invigorating source, doing the workshops and being around the other kids and other teachers that are doing it. And I will be the only one left on this hall still teaching this year, um, you know,

> ...just...just kind of falling by the wayside like everything else does eventually, I guess.

Cordelia wanted to maintain the level of student engagement in her classroom, but her source of support, two colleagues who participated in the Shakespeare Lives! program, left the classroom. Once teachers return to a classroom after a professional development experience, support is vital in maintaining transformation (Gallagher, 1997). Because of Cordelia's perceived lack of support from authority figures, along with little opportunity to reconnect with the Shakespeare Lives! program, will make it difficult for Cordelia to not only continue using the strategies, but to also adapt them in creative ways as she had earlier. Cordelia's transformation can be described as pedagogical because she continued to use strategies such as visualization, text cutting, and an abbreviated version of *Romeo and Juliet*. However, she did not use the strategies consistently from year to year, which brings into question how long her pedagogical transformation will remain sustained. Cordelia's fear of reprisal from authority figures inhibits professional transformation. Although Cordelia referenced personal transformation in 2005, no current evidence supports it

Teacher 4: Ariel

At the time of the interview, Ariel had taught both drama and English for thirteen years. She first heard of the Shakespeare Lives! program from her principal.

> Well for me, I was handed a folder by my principal, I glanced through it, saw SL work at the School of the Arts, funded by Kenan Foundation. Didn't know much

> more than that. And instantly said, “Oh my gosh, I have to do this.” Um, I had a 2-day turn around to meet the deadline and immediately sat down and filled out the application and sent it in. Um, but for me it wasn’t, I had no idea about a trip to London; it was simply working at the School of the Arts last summer and then it didn’t happen. And then I was heartbroken. I was very excited about doing it. But like [Benvolio], I kind of went into it blind. And then in May when I got a phone call asking me if I was still interested, I said, yes, but, my summer is pretty slammed, and then I found out that the dates were still available and I said yeesss, let’s do this.

Working at the North Carolina School of the Arts initially attracted Ariel to the program.

In 2005, Ariel articulated pedagogical, professional and personal changes resulting from her Shakespeare Lives! experience. She incorporated text cutting, visualization exercises, and ensemble work in her classroom. Once she returned from the Globe in the fall, her students noticed that her demeanor was calmer. Personally, Ariel maintained a sense of balance between “doing and being.”

Petite and full of energy, Ariel fully embraced the experience, even though she had little information about the program. Her energy, confidence and creativity are reflected in her pseudonym choices:

> It would have to [be] a mix of three; mainly Hermia and Ariel with a dash of Katherine:)
>
> - Hermia - the "little and low" spitfire
> - Katherine - who speaks her mind and thinks she doesn't want a boss
> - Ariel - the playful spirit enjoying the ruckus but ultimately does want to please
>
> You could stick with Ariel since you used it before...plus I did like that ;)

I used the character Ariel, the airy spirit from *The Tempest* as her pseudonym in the pilot study; therefore, at her suggestion, I kept it for this report.

I interviewed Ariel in her home. At the beginning of our interview, she pulled out her teaching artifacts, photographs and video stored on her laptop, Ariel's artifacts drove what she shared in the interview. The first artifact that Ariel shared was a video of her classroom walls, which the students painted. Images from Shakespeare's plays covered an entire wall:

> Ariel: But you have this ship from *The Tempest*. Here's Juliet, and Romeo's behind Suzanne [student in video]. The books have different play titles on them. Um, Bottom. Uh...Titus Adronicus. Is this the dagger I see before me? Lear. There's the little pearl. There's tons. This little green blur, you can tell it right now, that's a fairy coming out of a *Midsummer Night's Dream.* . . . But it's a tiny little classroom. This is Lucy who's going to School of the Arts, who decided she was sick of this wall and repainted it. I guess my classroom would be the best artifact of my teaching style now.
> LNM: Can you tell me how?
> Ariel: Um...allowing students ownership. Not having, not feeling like I have to be so rigid in my control.

The Shakespeare wall referenced more than six plays with each image added haphazardly as students became inspired. In addition to the Shakespeare wall, another wall bore painted handprints of students along with Ariel's footprint and the words, "Dare to be different." Indeed, Ariel's walls indicate that she follows this advice.

Next, Ariel pointed to her collection of children's books as another artifact:

> . . . [T]hese are all children's books over here, too. Like my Seuss collection, a lot of picture books. Um... I like to think that for every difficult text, there's an easier version of it. Something that they'll be able to grasp in an easier text that I can usually relate back to, and they'll go, ohhh. And when I can make that connection, they uh, they're more prone to attempt that assigned reading. You know, or the assigned task. There's something about, "well gosh, if they can do it for children, surely I can do it." Just getting past barriers.

The collection of children's books indicated Ariel's desire to connect her students with literature that can present a "barrier."

In Ariel's drama classes, she allowed students to portray character analyses through make-up. One artifact photo pictured the bare back of a student with detailed wings that looked three-dimensional. The wings, gray at the base, changed from black to red at the tips:

> And this is a preacher's son. And these are Lucifer's wings. She [the student who painted the wings] said, "It have been real easy to do black and red. But when you think about who Lucifer was, Lucifer was pure. And then through betrayal, through that anger, through that passion, through that desire for knowledge, that's when he turned into." She said, "Lucifer started out with white wings like all the other angels, but then through blood and tears, he eventually turned dark." I was like, "That's a good explanation; I like that."

The artifact and the student's explanation revealed that in order to create the make-up image, the student carefully considered the transformation of Lucifer's character.

Through the sharing of teaching artifacts, Ariel referenced only one Shakespeare Lives! strategy that she continued to use with *Macbeth*:

> I still do the animal exercise with the witches. Always we go to the auditorium and do that. And... I try, I make sure that I do that simply because of the presentation part of the senior project. I tell them, "If you can do this part, then the presentation's gonna be easy to do, so just throw yourselves into it, go with gusto, use your voices, use your body, come on." And um, they always laugh and have a good time even though they think it's silly. But afterwards, that's what they always remember. So I try to pull as much in as I can, and um, what I've... I guess, my compromise is... I can't do everything I want to with *Macbeth*.

The animal exercise came from Chris Stafford's workshop at the Globe. In a warm-up exercise, he asked the group to form shapes such as a square and a triangle, and to move together in that shape. Next, he had teachers "morph" into a cat as he counted down from 10. Stafford added the following instructions:

> Now feel how a cat might move. What type a cat are you? Are you sneaky? Cunning, fierce, proud? And freeze. Relax and back on your feet. Keep that feeling of wanting to claw someone, you might can use it later. Loose shoulders. Remember that cat.

Stafford repeated the instructions for an eagle and a scorpion. The teachers divided into three groups and moved as an ensemble as one of the three creatures while saying a line from the witches in the opening scene of *Macbeth*. This exercise incorporated all participants in physicalizing the text or somatic learning.

As Ariel talked about teaching *Macbeth*, she used the word *compromise* because she feels restrained because of senior project requirements. She bemoaned that the "last three years have frustrated me so much."

> I haven't been able to do the things that I normally do. As a matter of fact, I have students that come in and say, "Ms. _____, why don't we get to play with the swords?" Because before...before the senior project was dumped upon us, and that's probably not a fair way to say that, we wanted to get it perfect before it was required by the state. And we've been doing it for a long time. In the first couple of years, first couple of semesters I should say [after participating in Shakespeare Lives!], um, I was able to do more with *Macbeth* because...because I cut other things out and since then, I've kind of had to rush through *Macbeth*. Um...So we don't, we don't do the sword play anymore. I have wooden swords for them, and if they're really good they get to use the real metal swords. Um, ... the artwork that I have been doing...with it for the visual learners--that was put aside.

When asked what she wished she had more time to do, Ariel replied:

> Well, I always used to do relaxation techniques in class, and even in English class we would start with some sort of physical something. And it's straight to the work (snaps fingers) to get it done. It's as if those things are extra. You know, breathing and finding your voice. I know those are good life lessons. But it's like...curriculum has to take priority over those kinds of things, which is really weird, isn't it? Because they need to know themselves. They need to know how to relax. They need to know how to find their voice and find that confidence to be who they're going to be, probably a lot more than they need to know that Chaucer wrote the *Canterbury Tales*. And you know, it's a frame tale and they were going to see the archbishop and this was nothing more than a device to entertain them on their pilgrimage. I mean when you weigh those two things, what's really important? ...But...Isn't that sad?

Ariel echoed Shapiro's (2006) criticism of schooling, ". . .schools offer little that can be taken as a source of personal meaning, as a stimulus to critical thought, or as the catalyst for imaginative interpretation of the human experience" (p.10). Like her namesake character in *The Tempest*, Ariel felt the constraints of authority (curriculum). However, as her artifacts indicate, Ariel worked within those constraints to engage students with literature.

Although Ariel referenced one Shakespeare Lives! strategy and regretted eliminating relaxation techniques from her teaching methods, other artifacts indicated that her students engaged deeply with Shakespeare's works. Since 2005, she directed school productions of *The Tempest* and of *A Midsummer Night's Dream*. Ariel also described a former student's painting that hangs on her classroom wall:

> Ariel: . . . here he was at college, and he could have chosen to do any painting, anything he wanted to paint. And he chose *Hamlet* based on, you know, some discussions that he and I had had, debating whether *Macbeth* or *Hamlet* was better.
> LNM: I'm guessing he said *Hamlet*.
> Ariel: Well, actually, I said *Hamlet* (laughs). I love *Hamlet*. I loovve *Hamlet*.
> LNM: And he said *Macbeth* was?

> Ariel: He said, "*Macbeth* was so much more powerful." "Yeah, but *Hamlet* is so much more human." And I'm sure that's why I ended up with that painting was because for that he had chosen to do *Hamlet*. And the interesting thing was it's the end scene. It's the death scene. And Hamlet is still just barely alive in it. And in the background you have this one single row of floating heads. There's no bodies. You know. I'm going, "Is that the audience?" "Well, I don't know; what do you think?" "William, is that the audience, because if that's the audience, they're sitting behind the stage." He said, "Yes, unless it's a three-quarter, or a theatre- in-the-round." I went, "No, the way you painted this, this is a proscenium- style death scene." He's like "hmm." "You tell me. You painted it." He said, "I don't know. They're just disembodied heads floating there. It's very cerebral don't you think?"

The painting represented the effects of Ariel's teaching. It illustrates that this student interacted deeply with *Hamlet*, but it also revealed more: Ariel elicited and valued students' opinions. The fact that the student gave the painting to Ariel indicated that he valued his classroom experience. In addition, this student turned Ariel's question back to her, "Well, I don't know; what do you think?" He most likely modeled her questioning technique, which allowed their conversation to continue.

Ariel adapted performance strategies from Shakespeare Lives! workshops early in the semester, beginning with the study of Anglo-Saxon literature including ballads and *Beowulf*.

> Ariel: I, when I look at the ballads, I'll do a lot of rhythm work with the ballads, movement work with the ballads. Um...
> LNM: How do you do that?
> Ariel: Move them from one part of the room to another. You know skipping,...starting with walks. Sometimes I'll take them down to the auditorium and we'll move in circles. Before I do the ballads, we'll start walking slowly, and then we'll skip, and sometimes we'll run or jog so that they get that pounding, faster, steadier rhythm. I never tell them how to do, or what to do, but eventually, you know, they fall into that same rhythm as everybody else. Don't tell them that they have to walk in a circle, but they always end up walking in a circle to the same rhythm, to the same beat. And then we'll go back up and do ballads and all

> of sudden rhythm--the natural rhythm from that ballad. And we talk about how your bodies are going to find it. Your bodies are always listening for that natural rhythm.

Ariel described here the typical warm-up activities at the Globe that leads to somatic learning. Because the students found a "natural rhythm" from walking, skipping, and jogging, they easily identified the rhythm in the Anglo-Saxon ballads. Ariel found that students' knowledge of natural rhythm was sustained over time:

> And then, because we do the ballads earlier, when we do Shakespeare, and I talk about um, iambic pentameter and the heartbeat, inevitably without me saying anything, somebody will say, "Well that's the natural rhythm," so, it does tie back in.

When teaching two episodes from *Beowulf*, the battles with Grendel and Grendel's mother, Ariel, divided the text into smaller chunks through literary devices scavenger hunts and through paraphrasing. Next, she asked students to select the most important events in the plot:

> I give them six squares and have them make me a Beowulf comic strip. And they like that. And then sometimes they'll go so far as to say, "I can't do just six. Can I split, or can I add, what if I break it into twelve?" And I'm going, "Nnnno. Let's see if we can do this. And then sometimes the more arty ones will, they'll come in and go, "Well, here's this one. And here's the rest." (laughs). Um, but they like that. And before they realize it, they've gotten the whole story, but they've been able to pick out the really important parts and what do you have to have to understand that story. And then we can go back and talk about how were you able to weed through the unnecessary, the details, just to get to the bare bones. So. Which is really an adaptation of how do you edit a script of Shakespeare. How do you get to the bare bones? What must you have?

The process Ariel described is similar to the process the group undertook to prepare for

the festival performance in 2005. As a group, the teachers decided the important parts of the story of *The Tempest*, and divided the parts, or scenes, among themselves. Then they, or their students, cut the text into a 9-minute performance. Again, Ariel found that this early exercise prepared students to read and perform *Macbeth*:

> The um, the nice thing about that though is by the time we finish the *Beowulf* work, then every little thing we've done with that eventually gets kind of applied to whatever else we're doing. You know, they'll recall and say, --and they do it with *Macbeth* a lot-- "Why do we need to read this scene? Nothing happened." (laughs) "But it does." "Nuh-uh, we only had to read that because we had to get the prophecy of--ohh they're going to cut down the trees and move towards the castle. Ms. ____, that was the only point of that whole scene." I'm going, "That's right. That's good." So, they start applying those lessons without having to be told. So that's nice.

Through these exercises, Ariel's students engaged in critical reading in which they evaluated significant events and the importance of sequencing.

Ariel found it difficult to narrow down her experiences with Shakespeare Lives! to one most meaningful experience. Experiences came out in a rush:

> Well, there were so many meaningful experiences. Working with Glynnie. Wow. Working in the space...Woww. Working with those kids [in Southwark] and being thrown into it. Even though we were prepared, we weren't prepared. You know what I'm talking about? Seeing those children do *Hamlet*. [at Gosden House] . . . But I can still see their faces and sitting next to those parents and watching those parents' faces as their kids were, you know, doing *Hamlet* of all things. . . . Shoot. Dancing in the Thames taking my shoes off and dancing on that stairway. That was significant to me. . . . That whole two weeks was magical. It was as if I were a sponge, soaking up every cultural, emotion, physical experience that I could. You know, so, ...I guess I didn't want to take any of it for granted. I was aware of how lucky I was and that for me it really was a dream come true and I didn't want to waste a minute of it. You know...so being tired was ok. I could sleep when I got home if I needed to. Hanging out and getting to know everybody was wonderful.

Ariel referenced workshops with Glynn Macdonald in 2005 and throughout the 2008 interview. In Macdonald's gathering exercise, she asks participants to "go to the earth and gather all that I need." She walks participants through a physical and visual exercise in gathering from not only the earth, but also from around, and from the heavens. In the last step, participants repeat, "I gather so that I can give it to you." The lesson of this exercise for actors and teachers is that we must gather from things that fulfill us; otherwise, we will give ourselves away.

In 2005, Ariel reflected on how MacDonald's gathering exercise affected her personally:

> I think I found more security in relaxing back, taking that deep breath, finding that center and letting whatever comes, come from there. Um,… to take from the heavens and then give it all away. And then what you give is real. It's not what people expect. It's not, it's not meeting what you think they want, it's…giving of your genuine self.

Ariel recognized the connection between the exercise and her role as a teacher, "We as teachers are trained to give and give and give. It's nice to have permission to gather. 'To gather from the heavens all that I need' and give it away." Three years later, Ariel still utilized this exercise:

> I forgot to hold something back for myself the whole second semester of this year...it was a rough one. But as the end of April neared, I realized that I was giving it all away and did actually pull back. I did begin to rely on those relaxation techniques again and "remembered" to stay balanced. It made a difference in my classroom delivery.

MacDonald's elements exercise also became part of Ariel's way of seeing and expressing the world. In 2005, Ariel, when she became emotional, remarked, "Look, I'm finding my water, I'm going to tear up in a minute." Later, she described walking about London and joked, "I was saying I found my earth, I think I need to go in the water. (all of us laugh) You know just uh, to bring it back and find that energy." In 2008, Ariel remarked that

> I think I'm always using those things, Lynne, whether I'm conscious of it or not. I mean even if it's a moment of intense frustration when I hear Glynnie say, "Breathe." And quite often, like this past year after surgery, you know, somebody will say, "Oh, Ms. ____, are you ok?" "Yes, I'm just in my water today; it'll be ok." You know, just little things always just creep up.

MacDonald's exercises not only gave Ariel a way to reflect on lessons she learned about balance and about connecting with others, but also as a means to take care of her spirit and emotional well-being.

Although Ariel mentioned that "Working with those kids [in Southwark] and being thrown into it" was a meaningful experience, it was also a source of frustration. During the last week at the Globe, Chris Stafford intended for pairs of teachers to conduct a workshop with students who came to the Globe in order to put what they had learned in practice. However, after the July 7 bombings, all field trips into London were cancelled. Therefore, Stafford arranged for teachers to go to a school in Southwark to conduct a workshop together with one group. Divided into pairs, teachers were instructed to introduce students to *The Tempest* and to utilize the activities that they found meaningful. Afterwards, Ariel described the experience as follows:

> I tend to be goal-oriented. I know the goals I want and then I figure out what I am doing and work towards those objectives. And discovering the objective was difficult, but doable, and I understand the reasoning for it. But then trying to find activities between 8 people was um,…a challenge and I think part of the reason it was a challenge was because there was no firm direction. Every thing was very vague, everything was very unclear, and we all had a different sense of what was going on. You know, I think we all in our minds had a little idea of it and they were all different. And if you have people all working for a common goal, I think everybody has to know that goal going into it if they are to get along.

Ariel found planning the workshop difficult because she was accustomed to identifying an objective or learning goal and then selecting strategies to achieve the goal. The workshop planning transcript reflects her confusion during the process:

> Ariel: I'm having a hard time because we haven't decided on the specific objective yet.
> Stafford: I find it difficult to find the through-line. I have to think in activities, but I can understand the difficulty.
> Moyer: You're goal is to introduce the *Tempest* and think, what was the progression of my experience? Without us telling you how we run a workshop.

By the end of the planning session, each teacher pair was assigned one of the four segment workshops: 1) warm-up and introduction 2) a "bridging" activity that introduces students to "bite-sized" text 3) a scene from the play that focuses on relationships 4) a culmination or performance of the scene. The teacher pairs worked on a plan, but when they brought the plans back to the whole group, activities overlapped and sections 3 and 4 had to start over. Ariel felt the negative impact:

> Um, for me, everything up until that point had been a very unifying experience. It had been group-oriented, everybody felt close, everything brought us together. And then we do this activity, and I think it divided us. It put barriers up, and…that was frustrating. You know, and it, it was very hard to go from feeling family-like to feeling isolated. And because we are all teachers, we all have different teaching styles, we all have different ideas of things that will work and we did a very good job of trying to work together. I think we did a very good job of trying to share ideas, but, but there was a lot of hesitation, there was a lot of, it got to the point that there was a lot of emotions. And that came out of not knowing what our end goal was in the beginning. I really think that. Um…you know, and then, and then working the transitions between eight different people…. And, you know, the more structured in what you're doing the less opportunity there is for that kind of partnering unless you have enough time to work it out. And then when you add all of that together and you don't give enough time for clear planning, and I don't think we had enough, um,…you know, there's the potential for…conflict. I don't mean conflict as in fighting, I mean conflict as in internal strife. And, and for me that's what happened.

Three years later, Ariel reported that the workshop planning experience was the "only one" she could "have done without."

> That whole creating a group lesson plan and splitting it into sections. And working backwards--letting the goal emerge from the task. I think about that and it still frustrates me. That and the fact that everyone else was frustrated. And tired. And it just gave a negative moment when I didn't think there really had been any. Of course, I'm pretty obtuse. If there had been, I may not have noticed them. I was pretty wrapped up in the moment. Yeah. But even that was a growing experience so you can't say it was all bad. I learned that I don't work that way, and to this day, I still don't. Taught me to have plan A, B, and C, sometimes D. But it did teach me, here's a positive for you that came out of the negative. Since then I've had the opportunity to work with people who were adamant about doing things their own way, the way they insisted they be done. And um, I think it gave me a coping mechanism. I was able to, you know, from that experience, able to step back and say, "You know, this is not my show. Follow directions. Do what I'm told." And that's typically not my personality. So. Every cloud has a silver lining, right, Lynne?

For Ariel, this experience challenged her ideas about teaching and learning. The workshop planning (not the actual experience of working with the Southwark students)

lacked what Sparks (2000) calls *coherence*. Coherence calls for professional developers to "focus on the context that teachers teach" (Sparks, 2000, p. x). Teachers are charged to begin with specific learning goals or standards and scaffold activities to help students meet those goals/standards.

Although Ariel did not work from "letting the goal emerge from the task," she identified ways she changed professionally as a result of her Shakespeare Lives! experience. In her final interview in London, Ariel spoke of personal transformation:

> I don't think I'll ever be the same person I was when I left Charlotte. There's so many experiences to refer back to …to remind me of my sense of self, to remind me of the balance, the give and the take. It's not all about the exhale, it's the inhale as well. Um… even though we're doing a lot with voice and movement and bringing Shakespeare to life, there's so many…lessons that we can hold in our hearts for every day living. I really think my students are going to see a different person. You know… not a different person, but better person.

In November 2005, Ariel revealed that she was certainly a different teacher:

> The control freak in me kind of just laid back approach with lack of deadlines and, you know, play the games until they get it...less structure than I'm used to using...but there were moments when I felt like I had...lost… what I had that kind of motivated the kids to drive. And I don't know if that was you know, a chair and a whip that I...metaphorically had before, or what.

In the fall of 2005, Ariel's students noticed the change:

> I tend to be a traditionalist, which I'm not so much anymore. But they [students] had a hard time with that. And um, because I had a lot of them before anyway, they know how I work and they were all going...you know you should really be a little...what's going on with you? Because you're a little too laid back about all this. Shouldn't you be stressing out now? Shouldn't you be cracking the whip?

Before her Shakespeare Lives! experience, she admitted she would not have let students paint her room. Three years later, Ariel was no longer a “traditionalist.” She provided “choices in class and I think that is a direct result of Shakespeare Lives. Trying to let go of some of that control.” In providing choices, Ariel considered the students in her classes:

> Well, every class, you know, has a different personality. And some are more visual whereas some are, you know, more verbal. Some are more kinesthetic. Um, when it...well here's an example. If I have a new idea in particular, this is when I really like to try choices, I'll talk things through with them. "Ok, guys, we're getting ready to start this new unit. And here are some things we've done in the past. But I got to thinking, wouldn't this be fun? So, the main project is going to be this or this." And I always let them choose their own project because I think if they have that choice and they pick something they like, I should, in theory, get better work from them.

Ariel continued:

> I do think they like choices. The other thing though, is if I give them choices and they choose something and then later on they want to complain, I can say, "uh, uh, uh, You asked for this. You know, you have been given what you asked for." They hate that. But it is true. And sometimes, they'll ask for things when I haven't given them, they'll go, "But Ms. _____, you always say..." "Ok, but you know that old Chinese curse." "What?" "May you get what you ask for. 'Cause sometimes you get it and you're like, ‘Oh no, this isn't what I wanted at all!’ But then you're going to have to live with it.”

Ariel found that letting go of control and giving students choices changed the way she planned for student learning:

> It's ok to not have that rigid control. Um, what happens though, instead of having plan A, I have plan A, B, and C. Because I'm never quite sure which one's going to work for me at that point.

Ariel found that she needed plan “A, B, and C” because when students took control of their learning, the unexpected naturally arose.

Because Ariel let go of “rigid control” in her classroom, she developed more authentic relationships with her students:

> Three years later, I'm still ...I have to keep myself from becoming, I have to make sure that I keep that professional line between students and myself because more and more, it's less teacher-student and more person-person. This is what I have, you know. This is what I can offer you. But I also feel like I learn from my kids, too. So the exchange becomes mutually beneficial. And I think it's all about that.

Ariel became what Cranton (1994) calls a “reformist teacher,” which is a co-learner with the students who shares in the decision-making process over learning.

> But I think there's something about being rigid that is off-putting. And even kids who don't like English are finding things that they value from that. From that class. And I think it's simply because I've relaxed that control so that if we veer from the subject matter, we can deal with it, we can handle that because we're getting something from it. You know what I mean?

Ariel credited workshops with MacDonald and Steward Pearce, Master of Voice at the Globe, for helping her develop “person-person” relationships with her students:

> You know, after the experience, I bought Stewart's book, and I managed to find one of Glynnie's. You know when you read them, I don't think you can help but utilize that wisdom. Consciously or subconsciously. Knowing when to breathe or knowing that as an emotion gets to you, take that deep breath, find your heartvoice, just speak. You know speak from the heart to the heart. Don't speak from the mouth; the ears won't hear at all. You know make those connections. As Ariel began speaking from her heart, students’ perception of her changed.

She shared as an illustration another artifact, a card from a student she taught for four

years:

> Students, after they get to know me, always say, "I was scared of you." or "You're so intimidating." And I don't hear that so much anymore. You know whenever kids need something, my room is the first room that they come to. This little young'un, just graduated this year. Real quiet. And the first sentence, kind of bothered me. ...*You have moved from the teacher I feared to the teacher that I liked to the friend that I love.* Because "I feared"? I'm going, I'm 5'1", I bounce around all the time. But I think it's because I say what I'm thinking. But I also think it had a lot to do with that whole control freak. And I am a control freak; I just have to remind myself not to be.

Another student noted a change in Ariel that she shared during a field trip:

> She said, "I'm so glad we traveled together." I said, "Why?" She said, "You know when I had you in class, you're pretty much, you're pretty, you are the teacher." And this was four years ago. And uh, I said, "Yeah, well I am now." She said, "Yeah, but you're just real."

The connections that Ariel made lasted even after students graduated. She knows that

William, the Hamlet painter, has changed his major several times:

> [H]e went to school, broke his parents' heart [because he did not work as a glass blower], decided to be a theatre major. Then he thought he broke my heart when he went back to being an art major. And then, flip-flopped again. And I was like, "William, it doesn't matter to me. I just want you to be successful in anything you do." He was like, "I know."

Ariel described another student, a music major at Belmont College in Tennessee:

> "This little guy, I didn't know it, learned to play piano. He plays by ear. He learned to play piano to be the director of this play [*1940s Radio Hour*]. The music director." As Ariel looked through her artifacts, she revealed that knew her students well. What pedagogical changes made three years ago does the teacher continue to use?

Ariel became an adaptive expert in utilizing the performance-based strategies.

She described her use of the animal morphing exercise with *Macbeth* in much the same way as Stafford's use in the Globe workshop. However, she also adapted the strategies to use with other literature. For example, in asking students to cut *Beowulf* text down to "bare bones," she incorporated comic book squares and asked students to sketch key scenes.

Ariel found that the performance-based strategies assisted her in meeting students' differing learning styles in her classroom. She also found that utilizing the rhythm exercises and cutting text that she used early in the semester carried over into other works, including Shakespeare. In addition, students who traditionally do not like to read literature benefited: "And even kids who don't like English are finding things that they value from that. From that class." Ariel regretted that curriculum restraints prevent her from using more of the techniques such as relaxation and focusing activities because they help students engage in "important life lessons."

What professional changes does the teacher describe?

A recurring theme in Ariel's narration is one of "letting go of control." A self-described "control freak" who "cracked the whip" in her classroom, Ariel noted that she learned to let go of absolute control by allowing students choices in the direction of their learning. In addition, Ariel gained confidence in her teaching:

> The SL experience gave me the confidence to pursue NBPTS [National Board for Professional Teaching Standards] certification. At our school, my methods had always been considered "different" by my peers and I had felt that it wasn't a compliment even though students responded positively. The SL training made me

> feel validated and gave me great new ideas and ways to incorporate even more hands on/participation activities in class. When I started researching, I felt like I was meeting almost all of NBPTS criteria, so it shouldn't be terribly difficult. It was very difficult going through the process, but in my classes, I didn't have to do anything other than what I was already doing with my students. A certification in drama through English AYAL [Adolescent-Young Adult Learners] on the first try --from what I've heard--is fairly rare. I feel I owe my success to SL. And of course, to my mentor and readers.

What personal changes does the teacher describe?

On a personal level, Ariel learned to recognize when her life became out of balance because she was giving too much of herself to her work. She gave herself "permission to gather" or find ways to renew her energy. Ultimately, Ariel communicated more authentically with her students as she began to speak from her "heartvoice" that Stewart Pearce and Glynn Macdonald tapped into.

In what ways are the changes the teacher attributed to Shakespeare Lives! sustained three years after her professional development experience, and in what ways are the changes transformative?

In 2005, Ariel identified herself as a "traditionalist" teacher who controlled the direction of student learning. However, three years later, Ariel's teaching philosophy is one of co-learner by giving students choices. By "hav[ing] plan A, B, and C. Because I'm never quite sure which one's going to work for me at that point," she became comfortable with being "open to the uncertain and the incomplete to engage with [her] students. . ." (Greene, 2001, p. 7). Ariel also said in 2005 that her students would see a "different person. You know… not a different person, but better person." Because she

began to engage “person-to-person” using her “heartvoice,” her relationships with students became more authentic. She cited several examples of students who were intimidated by her four years ago, but now view her as “real.” Ariel concluded the interview with the comment, “So I don't know what it is, but I would say yes, I'm...still...changed. You know, I haven't reverted back.” Ariel experienced all three types of transformation: pedagogical, professional, and personal.

Teacher 5: Kate

Kate and I met on a summer morning on the porch of a bed and breakfast built in 1903 near her hometown. At the time of our interview, Kate had taught English for 28 years. She claimed that Shakespeare Lives! “found me.” Another teacher who was unable to attend in 2005 shared the information with Kate, who “grabbed the opportunity because I felt like it would just enhance the teaching of Shakespeare as well as any thing in English um, markedly.” She “was excited to be able to stretch myself in study of Shakespeare.” Kate selected her pseudonym from the central character in The *Taming of the Shrew* for “her spit and playfulness.” Her interview revealed that she enjoyed play in the classroom, but she was anything but a shrew.

In 2005, Kate described the changes she experienced as pedagogical. For example, she cited as an important discovery the strategy of “of taking a piece out of the work before getting into the work.” She shared this “epiphany” as follows:

> Like pulling, uh, a pretty dynamic scene out of *Macbeth* for instance. Uh, like the very first scene, those 13 incredible lines and digging into it without the kids

> knowing the context in which it's meant. And, um, kind of giving them that touch and then going into the play where they, you know, "Ah, I understand this, that was easy, we just did it." And you get them into it before you know what's hit them. That's wonderful because you're not going through we're-going-to-read-the-first-scene. You know, they've come alive because it's theirs. It's not yours any more; it's theirs. And you're doing that, you're letting them find it for themselves. And that just keeps happening over and over the way they get to act out and realize they've just acted out a scene and didn't even know that's what they did. So those are some of the epiphanies.

Three years later, Kate described how she introduced *Macbeth* by performing the opening scene:

> Well, I make kind of an idiot of myself...which helps tremendously. Um, of course you know, *Macbeth* starts with the witches. And so, um, I either have two students whom I know read well and are not embarrassed to put forth some effort. But I can sound like a very good witch. . . . And other times I have a teacher next to me who even laughs like a witch, I must say (laughs). Um, but anyway, she's more than glad to help me out and we do the first scene. I've known it; I can practically recite the entire play to you. I know you don't want to hear all that. But um, you know, we're able to introduce it and it, just as Shakespeare intended, it gets their attention. Um, so, um, and sometimes I do that with very little preface to it. I just kind of shock them into, "Oh my gosh, what is she doing?" And so that gets their attention, thereby gets them engaged.

Kate asserted that when she "plays" the part of a witch along with a colleague and students, it whetted the students' appetite for the play. Next, she incorporated another strategy from Shakespeare Lives!: text cutting.

> [O]ne of the ways I start *Macbeth* is a 32-second *Macbeth*, and it tells the entire story in 32 seconds. And I get my really good readers, I'll pass that out, and I'll get my really good readers to take different parts and they're to read it just as fast as they can read. And I say, "Ok, you've done *Macbeth*. We're done." And um, they're just, you know, shocked.

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Kate found that introducing a play using bits of texts gave the students confidence in

reading the play.

Not only did Kate provide a cut, 32-second *Macbeth,* she assigned her students to cut text as well in preparation of a performance:

> With *Macbeth*, since I have been involved with Shakespeare Lives, we have emulated very much what we did um, with *The Tempest*. Um, they have a good idea of the play, the main ideas, um, and then they are assigned different acts once we've gone through the play and studied the main ideas and symbolisms and so on and so forth. Then they go through and they pull out the important parts of each scene and each act. So I'll have a group that will handle Act I and group that will handle Act II and so on it goes. And then they'll divide the scenes up and they'll decide what's important and what can be left out. In fact, there're some scenes that can be left out. Um, and so once they've kind of chosen what they're going to tell about the play, then they pull lines that will adequately inform the audience of the main ideas. And then they try to keep the lines equivalent for each participant in that act. And then they learn the lines with actions and we have columns that we work around just as we did in the Globe Theatre. Practically no set whatsoever. Uh, we do usually use a cauldron for the witches. In fact, I've got laminated ingredients to add to their brew because it's really rather effective. So they, you know, actually perform the play in a condensed version using Shakespeare's, you know, vocabulary and lines verbatim. And it's just absolutely thrilling to hear these students who can barely speak English, you know, recite an entire passage from Shakespeare. So, that's been successful.

The model that Kate described here follows the model for the festival after teachers returned from London. Kate's students cut and used the text to inform their performances of the scenes. In addition, every student engaged in performance:

> And some of them shy away from it, but um, generally we get them involved. I had, uh, or, oh I'd three or four students this year, you know, they stood on the sidelines for everything we did. And amazingly, got involved because I told them everybody is participating, everybody's in this play, there are no stage hands. We are all stage hands and we are all actors. And um, they just, you know, kind of like I was with Shakespeare Lives. This is all interesting, but I can't do this on the stage. And they did. As I did. (laughs) And if they see you make an effort to do something they know frightens you, they're willing to give it a go, too.

Kate drew from her performance experience at the Globe to connect to her students' insecurities:

> [I]n *The Tempest* when we did that at the Globe Theatre--I was terrified-- um, I thought, "I'm going to do this." And so I've been able to say to my students, "Look, I know what it is to be terrified. The only way to get over it is to do it." And I can use that as an example.

Because Kate shared her personal experience with stage fright, her students became willing participants on the stage.

Kate utilized text cutting with both *Beowulf* and Arthur Miller's *The Crucible*. For example, her students read transcripts from the Salem Witch Trials, focusing on a particular person.

> [S]o they study the characters, they get inside who these people were. And then after they've learned that, they apply what they've learned about the characters to their um, presentation in *The Crucible*. And again, they pull lines and so on and so forth, and condense it so that it's do-able. And uh, sometimes in that case I allow them to modernize the language. And sometimes we take Arthur Miller's language. So it's very do-able in just about any play, or we might even study something and make a play out of it and follow the same process.

Through text cutting and scene performances, students engaged in character and plot analysis, important critical reading skills. Kate believed that the process was more important than the product:

> And the process, what they learn in the process is so enormously valuable. They have to understand the work to be able to do it. And to be able to say, "No this scene could be left out. No, I don't want this scene is important because"--that's where the learning takes place. The acting out of the play is almost secondary as far as, you know, what they learn. I don't say it's secondary, but it's ...it's not the most important part, really for the learning process.

Kate invited other classes to view her students' performances "awakened an awareness on [her colleagues] part."

> They want to emulate this process because they see the value in it and they see the success in it. And we usually do it in front of a couple of classrooms when we do the play. So they get a taste of what it is we've been doing.

Because Kate shared with her colleagues, she not only gained their support, but also interest in learning performance strategies as well.

Kate wrote, "I feel that I have grown as a teacher through my experiences with Shakespeare Lives!." Her method for teaching literature changed:

> My students no longer plow through *Macbeth*, *Hamlet*, *The Crucible*, or *Our Town* (just to cite a few examples) in a futile exercise of reading "foreign" literature. My students and I become Macbeth, Lady Macbeth, witches, Macduff; we become John Proctor, Elizabeth Proctor, Abigail, Mary Warren; we become the real people in these realistic works of literature. Students learn to pull out the "meat" of specific acts and condense them to an abbreviated version that is a viable facsimile of its original form. They then choose an equitable number of lines straight from the work, having to discern which lines best present the essence of the scenes, and, yes, at times, having to relinquish those lines that are almost painful to let go.

Kate became more than the expert on the literature, she participated *with* her students in their performances.

Participating with students was not the only professional change for Kate. She credited her experience with Shakespeare Lives! as "kind of a self-realization in the sense

of what I could do with myself as a tool to help my students." The metaphor of a "tool" is similar to one she used in 2005 on her last day at the Globe:

> I mean to watch the plays and that excitement and enthusiasm is going to go back to the classroom and shared with them. And pictures, and the memories and…everything that we can recall and write in our journals, all of that. You know. It's for them; we're just the medium through which all that goes. And hopefully, it will be delivered with the same level of enthusiasm with which we saw it.

Kate credited Shakespeare Lives! for her realization that "the kids have to do the work, not I." Once she implemented the performance strategies, she discovered that

> it just gives you an awareness that they need to be involved in what they're doing. You can't just read through *Macbeth* and expect them to get it--especially the regular student. The regular student is capable of understanding, you know, the content of *Macbeth*. You just have to get them involved in it so they can. And that's probably been the most., um...revealing aspect of Shakespeare Lives!--to get them involved, participating.

By becoming the "tool" or "medium" for student learning, Kate gave her students ownership in the learning process. "You know, they've come alive because it's theirs. It's not yours any more; it's theirs. And you're doing that, you're letting them find it for themselves."

The Shakespeare Lives! ideal of involving every student in performance led Kate in an interesting direction that involved the entire school and community. Kate received a grant to build a replica of Henry David Thoreau's house on the school campus.

> Um, it's not just a matter of having somebody come and build it, we're building it. So it's involving math students, drafting students, carpentry students, uh, English students can learn to hammer just as well as carpentry students can. And ultimately when it's completed, the actual building process is part of the learning,

> but then it will be an accessible outdoor classroom so to speak, for any number of classes. And again, the idea of getting them involved and the ownership in what they're doing. It's something that doesn't belong to me the teacher; it's something that belongs to the school community.

Kate involved the school superintendent who laid the foundation for the house as well as her colleagues:

> We've got a Spanish teacher who's a brick mason and a builder, wonderful carpenter. He's helping with it. Um, the carpentry, agriculture teachers, drafting teachers are all very much involved in the actual structure coming along. And uh, we're going to build the foundation and the frame this summer and then the students are going to come in in the fall and do the rest. So I'm really excited about that.

The project came full circle when Kate planned for a performance to celebrate the completion of the project.

> And, I have found a play on Henry David Thoreau, which is just perfect. And so, um, my hopes are to um, be able to uh...perform that play in regard to his building, demonstrating his philosophy and so forth. Um, so I'm really excited about that. So, yes, I would say that the main concept of getting everybody involved and having activities that will afford their interests so that they will get involved is certainly in part, if not greatly attributed to Shakespeare Lives!.

Kate's experience with Shakespeare Lives! not only changed her teaching of Shakespeare and drama; it influenced her teaching philosophy, namely to engage every student in learning, to expand learning beyond her classroom.

While Kate found performance strategies meaningful in that they impacted her teaching pedagogy, her most meaningful experiences with Shakespeare Lives! dealt with authentic communication. While in England, Kate suffered a death in her family and

learned the news just before a workshop with Glynn MacDonald. MacDonald's response as well as that of the group's provided some comfort.

> I may not seem to be showing a great deal of emotion, that's in private time. But also, I would have moved aside or backed off considerably had these particular people had not been so tremendously supportive. And that includes Glynnie as well because I found that out immediately after, uh, immediately before her session. And she addressed that immediately before her first session with me and she addressed that immediately in a very considerate, sensitive way. But I just feel that being with all of you has helped me deal with that far better than if this hadn't been such a place where it… and that's such an unusual situation to arise. I doubt that that's happened frequently while this camp was going on. Um, it's…it's made it possible to put it in a sensible perspective.

Three years later, Kate stated that MacDonald's workshop provided one of her most meaningful experiences with the program.

> With Glynn, she had a gift of making every single person feel that she was individually addressing them and seeing their significance. And she's worked with some of the most well-known people, I mean she's a professional of the highest degree, and yet a little teacher from Pinetown, North Carolina feels just as important as Alec Guinness. She just had such a gift of giving herself to you and enhancing confidence, something I have lacked throughout a great portion of my life. And she really was able to make you feel that you could do, and that was a gift she gave to me that I hope I'm able to give my students. That they do, and that they are important.

The phrases "seeing their significance," and "she had the gift of giving herself to you" indicated that MacDonald engaged authentically with Kate, which resulted in "enhancing" Kate's confidence. In addition, this interaction led to Kate's goal of giving this "gift" to her own students.

In addition to MacDonald, Kate found her experience in Steward Pearce's voice workshops personally meaningful as well.

> Kate: And Stewart...all I can say is wow. I can't really pinpoint one thing. Just to be in his presence was...just amazing. And that's an empty comment; that doesn't clarify a thing does it? It was just a thrill to be able to absorb any small part of what he was able to do. He was transforming. So was she.
> LNM: Can you tell in what way he was transforming?
> Kate: Well, like Glynn, you know you're dealing with this person who has dealt with such professional, professionally astute people, and he is able to pull out of you things you had no concept you were capable of doing. And it was exciting, and like an epiphany, and fun. Um, again, instilled a sense of confidence. And that confidence came probably after the fact. After I got back. It took some time to absorb, but it did absorb.
> LNM: What do you feel like he pulled out of you? What kind of epiphany do you think you had with him?
> Kate: hum...I'm trying to think back. I remember having one, what exactly, I'm not sure. Um,...well, I guess once you got the awe out of the way, um, the idea of what he was presenting and expecting could actually come out of me. Um, and I think it probably has more since then, then at that time. Does that answer your question or is it still horribly vague? He dealt with projection, posture, um, kind of an aura about yourself. And I think I see that more since I was there than actually when I was there is what I'm trying to say.

Kate found it difficult to articulate the transformative effect of Pearce's workshop. Pearce was "able to pull out of you things you had no concept you were capable of doing." Because Kate experienced success, she credits both MacDonald and Pearce with helping her gain confidence. In turn, as evidenced earlier, Kate fostered confidence in her students as they performed scenes in front of other classes.

Kate provided an example of how her confidence led her to play in a school musical alongside her students.

> I was absolutely petrified, but I thought, ok I have got to deal with this and get over it. So I put myself in that position on purpose. Um, well actually it sort of fell to me, but I could have just as easily said no, but I didn't. I was a floozy old lady who um, wanted to win the hand of a prince.

In 2005, Kate used the word *traumatic* to describe performing on the Globe stage. Three years later, she felt "petrified," but chose to face her fear head on. When asked if she had fun, she replied, "Oh my goodness yes. Terrifyingly (laughs). But it was, it really was. I had a wonderful time with it." Although Kate believed she overcame her fear, she discovered something more important to her:

> But the important thing isn't me so much as my being able to tell students, "Ok, no one can be more terrified than I was and it can work. So you can do it." And I can show them ways to do that. And using those methods, um, the movement. If you put movement with it and you choreograph it so to speak, the words come with it. And I learned all that with Shakespeare Lives!, most definitely.

Three years after participating in the program, Kate claimed that "the whole experience was just a stepping stone in my um, life" to "being a better teacher, a more aware person, ...self-growth....um, communication with other people...and intellectual adrenaline." The word *communication* is one that Kate used repeatedly in talking about working with people in the program as well as with her students. One artifact of her teaching, a letter from a graduating senior, revealed that Kate indeed gave her the "gift" of confidence and made her feel significant. Kate knew her student well:

> Her mother has about ten or twelve, thirteen children--all from different men. She's a drug addict. And uh, this little girl has been a foster child the majority of her life. She is straight-forward, very direct, says exactly what she thinks, but is incredibly polite. Um, she has a little short fuse sometimes, but um, she knows the art of apology. She's very independent and um, has certainly been exposed to a lot of negative stimulus.

Kate shared that this student "very much wanted to be Lady Macbeth" and transformed into the character.

> With various exercises, [students] are groomed to handle the choreography of their actions with their memorized lines. What transpires within each student's awareness is astounding!! I have seen, most recently this spring, a petite senior girl become a distraught and psychologically spent Lady Macbeth who, with all of the hand rubbing that she could muster, could not cleanse the blood from her hands, blood that was all but visible with the naked eye.

This same student explored foster care with her senior project. After completing the product and presentation, she asked to share a story with Kate:

> And she told this heart-wrenching story. And at the end, (clears throat) I said, "K____, that little girl was you, wasn't it?" And she said, "Yes, M'am." And I said, "That's just our little secret." But um, she told her story, and it was just terrifically sad. But very happy in the end because she's risen above all that.

Kate attributed this student's success to "Shakespeare Lives! methodology because when she got to pour herself into something, and be so much a part of it, and put herself into it conscientiously, um, it, it just did so much for her self-esteem, her self-image." However, part of the student's willingness to participate and to share was due to Kate's authentic communication.

> She realized what it means to reach out to, you know, to other people and to be reached out to--although I'm not supposed to end a sentence in a preposition. Um, I think she felt someone truly cared about her. And that was something new and different to her. So I think all those things led in to her saying that she wanted to teach. And if she wants to teach, she will teach. She will go after what she wants.

Just as MacDonald "gave herself" to Kate in London, Kate has given herself to this student by "truly" caring about her. This chain of caring has potential to continue as Kate's student pursues a teaching career. This example also provides evidence to support

the program's assertion that "Each step and every day draws individuals away from the teacher within to release the student trying to find [her] way out" (Malcolm, 2007, p. 8).

What pedagogical changes made three years ago does the teacher continue to use?

Kate utilized text cutting in teaching not only Shakespeare's plays, but also in other works of literature as well. She also assigned her students to cut scenes for performance. Groups of students analyzed character, decided on props and music, learned lines and performed scenes for other classes. Kate and her students "become Macbeth, Lady Macbeth, witches, Macduff; we become John Proctor, Elizabeth Proctor, Abigail, Mary Warren; we become the real people in these realistic works of literature."

In Kate's words, she continued to use the strategies because "[t]he methodology of Shakespeare Lives! has extended far beyond the limitations of the performance in itself; they've become active learners in areas of their interests and expertise as well." Kate realized through Shakespeare Lives! that "students should do the work, not I." Therefore, she became the "tool" or "medium" for student learning; her students had more ownership in the classroom.

What professional changes does the teacher describe?

One professional change that Kate attributed to her Shakespeare Lives! experience is that "the students should do the work, not I. Kate incorporated more project-based learning in her class, as evidence by the Thoreau project. Kate also developed more authentic relationships with her students.

What personal changes does the teacher describe?

Although Kate did not describe personal changes in 2005, she came to recognize personal changes over time. Kate found that three years later, she continued to find her experience in MacDonald's and Pearce's workshops meaningful. She recognized that they pulled out of her abilities that she had not previously recognized. As a result, she became more confident and willing to overcome her "fear" of acting. Kate wanted to share that excitement and foster confidence in her own students.

In what ways are the changes that the teacher attributed to Shakespeare Lives! sustained three years after the professional development experience, and in what ways are the changes transformative?

It is difficult to isolate the professional and personal changes Kate experienced as a result of her experience with Shakespeare Lives!. Kate became "more aware of body language and realize the power of the use of the voice in different manners. I realize that how I move my body is a rhythm of who I am from within." Kate shared herself with her students, who in turn, shared themselves with her. Kate credits performing on the Globe stage, a "terrifying" experience, with giving her personal confidence. As a result, she shared her experience with her students so that they took risks as well. A recurring theme in Kate's interview and written responses was the importance of communication:

> Well, you know, when you're teaching in a particular area, and you've been exposed to the same people for such a long time, you begin to think the same or you're a little more confined in your awareness. And um, going to another country, working with people from all different areas of North Carolina as well as the world, um, broadens those horizons, which I think is important, necessary, and healthy. You've got to see how other people perceive things, and grow beyond the familiar. And that enhances your ability to communicate. But then, with that intellectual stimulation, I mean as a teacher, we like to be stimulated intellectually. But it's not just for us; that's a perk. It's what we can do with what we are given, to bring it back to our students and make it realistic and alive for them. If we can use that and channel it so that it makes our teaching them more realistic and we're able to reach them, and spark something in them, therein is the value of that communication.

Kate's transformation can be described as pedagogical because she continued to use performance strategies, professional because she interacted more authentically with her students, and personal because she overcame stage fright and gained more confidence.

Teacher 6: Puck

I encountered Puck at an Advanced Placement English Literature and Composition professional development in 2006, one year after the trip to London. During one of our conversations, she told me that she was not the same teacher that she was before Shakespeare Lives!; she said that she was more patient. At the time of our interview in 2008, Puck was approaching her thirtieth year of teaching and "enjoying every minute, every minute." We met at a restaurant during lunch for our interview. Puck entered the program because it "was a dream come true" and it was "tailor made not just for me, but for my students." A self-described "clown or a jokester or a prankster," Puck chose her pseudonym "because [she] loves life." She also claimed that her students accused her of "tricking" them into learning.

Since participating in Shakespeare Lives!, Puck taught several of Shakespeare's plays including *Macbeth*, *Othello*, *Hamlet*, *Tempest*, and *Henry IV Part 1*. She claimed that "since '05, I just feel like it's easier to challenge myself with it, too." One student joked in his high school last will and testament:

> I had a student years ago to leave me in his last will and testament, all of his notes on Shakespeare. And he was being really catty and really silly and he said, "I know I have written every word that Shakespeare did. Every word that Shakespeare ever wrote, I'm sure she made us read." Just crazy silly stuff. "So I'm leaving you all of this and you're to read it every day."

Puck has earned a reputation as a teacher of Shakespeare.

Puck began using performance strategies the first day of each semester to learn students' names. In London, practitioner Jo Howarth used a beach ball during warm up activities to not only warm up bodies and voices, but to also enhance focus. Puck utilized this strategy in a similar way:

> We play ball games with um, characters' names. And we start off the semester with name games with passing the ball or volleyball-type activities so I can learn their names. Then we get into a reading and to learn characters, we use Shakespearean character names. And so that's been a lot of fun. And they don't realize what they're doing until after the fact. Really, I think that's part of what really impresses them. "I thought this was just going to be fun, and now I come away from this activity and we've learned this stuff. She tricked me." I like that.

Puck's students saw her as the trickster who made learning fun.

Puck adapted the ball activity by assigning groups of students to devise a review game or a game to teach the class a scene. One class devised a kick-ball game to review literary terms and challenged a ninth grade English class before their End-of-Course test.

> And one thing we did, we challenged a freshman class that had just studied *Romeo and Juliet*, and we talked about um, Shakespearean um, um, traits, characteristics, vocabulary and to get a run, you had to be able to define a term. A term was thrown at you, and to make a run, you had to define it. And so the seniors challenged the freshmen.

In this example, students took ownership of how to demonstrate learning. In addition, they competed with another English class, which built a sense of fun.

Puck began adapting the performance techniques immediately upon her return from London. In 2005, she shared how students utilized the build a boat activity to reenact Beowulf's funeral: "We built the ship, No eyes, no tongue, be silent. Then they

went rowing up and down the halls. One Spanish class came out in the hall singing "Row Your Boat" in Spanish! They've learned more about *Beowulf*." Again, the activity built a sense of community not only within Puck's class, but within the school when the Spanish class spontaneously participated. Three years later, Puck modified the build a boat activity even more:

> Puck: Well, I modified all of those that we did in the workshops before we went to the Globe. If you remember, we built a ship with our bodies.
> LNM: Yep.
> Puck: Well, we've done that. And it's the funniest thing in the world to see this ship made of kids floating down the hall, but they do a really nice job of it. I've brought in different articles, divided supplies, items. And I divided the class into three or four, and I would give everybody a different object or two or three, and would say, "Build a ship out of this. Use everything at your disposal. But make these objects I've given you the biggest items in the construction of your boat or your ship." And so they really have to work on creativity. And I've taken pictures. I've been really fascinated with some of the stuff they've come up with. Things that I would have never guess, and I was saying, "What was your assignment? What were you supposed to build?" "Oh, it's a ship." "Oh, ok."

Puck expanded the build a boat strategy to an exercise in creativity and collaboration.

Another adaptation was revealed through one of Puck's artifacts, a bow. In 2005, Puck found the elements as a unifying trait to the workshops:

> We talk with or given exercises with activities with speech, with movement, with dialogue, with script. And we keep going back to the 4 elements and what these 4 mean. And how you work within this frame, and the next day the elements are the same, but the direction is a little different and little varied and it all gels. And it all works. And that was an epiphany for me.

Puck used the elements as a warm-up activity and then assigned students to devise their own words and motions:

> I said, "We need some kind of wake-up activity every single morning to get everybody on board, or every afternoon to get every afternoon to get everybody on board." One of the first assignments I gave them was to come up with a movement. And they had to have a sound to along with the movement. So if they had an explosion, they had to move their arms and have it settle, you know the clouds of dust or flames or whatever. Or if they did a bird, they'd have to "bwakk." Then we chose our favorite five movements and sounds. And then had this routine that they went through every day that they would, alright, we're settling down, we're ready to start class. But we're going to wake everybody up; we're going to jolt everybody, so, we're going to do this. We're going to do our chant.

This morning/afternoon exercise led to Puck's bow ("give me your hands if we be friends"):

> Puck: During the senior awards day, I gave out the awards for the English dept. And one of the seniors in the audience made some kind of wise-crack about, "Give an order, give us an order. Make us do something." They had told their parents about all the crazy things we do in class. So I stood away from the podium, and I spread my arms out, and I said, "I would like to introduce the seniors of _____ High School in all of their beauty." And they stood up most gloriously, and they did the fire, the wind, the rain,
> LNM: Ah, no.
> Puck: and the last was the earth. And they just roared. It was just so much fun.
> LNM: Wow. You must have taught most of those kids, then.
> Puck: Yeah. All but one class.
> LNM: Wow.
> Puck: And it was fun.
> LNM: Now that, how did that make you feel when they did that?
> Puck: I just cried (laughs).

Puck continued that the seniors who were not in her class joined in as well. The seniors' reaction demonstrated that the adaptation of the elements exercise created camaraderie among her students. In addition, Puck encouraged the students to take a bow because they earned praise or applause for their achievements.

Puck's next artifact illustrated that exercises such as Macdonald's elements and archer exercises inspired her to create her own. The archer exercise is a goal-setting and focus exercise. Participants visualize a goal placed on a target, go through the motions of pulling an arrow out of a quiver, placing it in the bow, and shooting it at the target. Instead of a bow and arrow, Puck's artifact is a horse's bridle.

> And it would not be made of leather; it would be made of yarn. And it could be as plain and simple or as fancy and intricate as any student would want to make it. And it would have a nametag on it that a student would have to come up with, a very creative name. Um, and this starts off my first semester of every senior year. And they, my students will say, "Why are we doing a horse's bridle?" Well, you have to have your horse in tow, and you have to teach your horse some discipline, and how to follow orders and come through in a pinch. You have to dedicate yourself to this horse. Its name can be Flash, can be Beauregard, can be any name you want it to be. And this nametag is part of the bridle. We march as horses. We become the horse and we march as horses down the halls of our school. And we are very well disciplined. And then we talk about watering the horses and feeding horses and taking really good care of our healthy horses. And they all think it's so funny and it's a joke. But they have become the horses. And they take good care of themselves. And they, in turn, take good care of their horses. And I'm just really, really pleased with the concern that they have. And they think it's all so funny and she's so silly. What's she going to come up with next? We talk about that. We start with the horses. And they are high-steppers, and they are crawlers, and they are scuffers. And by the end of the semester, they are all very well-trained.

Puck created a "stable" for the bridles on a bulletin board in the classroom. Just as the archer exercise helps the participants focus on a goal, the bridle served as a metaphor for self-care. Placing the bridle on the bulletin board reminded students that they needed self-discipline for school success and that they must take care of themselves. In addition, the students took their students out of the "stable" to learn iambic pentameter. During one of MacDonald's exercises, participants imagined galloping on horses, which

mimicked the beat of iambic pentameter. As they became accustomed to the beat, they said a line from a sonnet or play. Puck's students galloped as horses and learned iambic pentameter "quite successfully."

The examples above illustrate that relationships were important to Puck. In 2005, Puck described the group of Shakespeare Lives! teachers in the following way:

> You folks were given um, seven names um from different parts of the state, um, uh. A few of us knew each other. The majority did not. From Camp Shakespeare, from that Tuesday evening on, and for the rest of our lives, we will be sisters, sisters in Shakespeare, or whatever you want to call it.

Puck attributed the closeness to how they were treated by the Globe staff, particularly the day of the July 7 bombings:

> And they've given us heart. They were so concerned about us on Thursday through the bombing. They gave us telephones, to call home. They gave us tea. If we came in wet, they wanted to give us a jacket. It was such genuine concern and very genuine…um…concern of making sure of bodily, emotional needs and our educational [audio tape unclear] through them. It's all so genuine and so heart felt. It's wonderful.

Puck's reference, "they've given us heart," revealed the authenticity of the relationship between the Globe staff and teachers. This authenticity is further highlighted in Puck's most meaningful experience, which occurred during the final rehearsal of the performance from *The Tempest*:

> It was really hard for me. I don't know why, but during that whole week, I had the worst time memorizing lines. If I had to dramatize a speech or a scene, or a section, I could do it emotionally. But I just couldn't memorize a thing. And I felt so bad. And I felt like I had let everybody down. We did some kind of exercise one day, and ...oh, was it the practice for the curtain call, and we were

> supposed to walk out on the stage, and it seems like we were given...maybe a character, and we were to bow.

Puck's metaphorical artifact, the bow, appeared again in our conversation. This bow, paired with Macdonald's archetype exercise, affected Puck profoundly.

> And she said, for me, she gave me instruction to be the queen. And to spread my arms, and to bow. And she complemented me on that. And could have melted on that stage. It seems like that was the end of towards the course, it was the end of the week. And we were all so tired and we'd had some crazy, crazy rehearsals late at night. And that just...hit me real hard. And I just, I, I just really felt a part of everything and everybody. Not apart from, a part of. And maybe I couldn't remember all my lines, but I felt every word.

Macdonald created an atmosphere where "everyone receives each other" (Palmer 1993, p. 73). Macdonald validated Puck's creativity and alleviated her fear of failure on the stage.

The moment that Puck "felt a part of everything and everybody" triggered a professional transformation in her.

> I realized...that you just can't give a student enough confidence. You cannot, I cannot give a student enough self-worth by saying, "Gee, Lynne, that was a great job. I really enjoy seeing your eyes light up. I really enjoy seeing that snaggle tooth of yours." That made a big difference. I talk to my kids all the time. Before class, after class, in class. It really doesn't matter. But my kids are basically rural, and their families work very, very hard. And they don't always communicate with their parents on any level. And for some kids, we are the only person of authority in their lives. And it can't be work, work, work. It's got to be an emotional contact.

Puck worked to build confidence in her students through openness and genuineness.

Puck asserted that she "was a different teacher than [she] was before." When

asked to describe the difference, Puck explained:

> Well, it goes right along, I think, with being emotional with the kids, being more giving of myself, and the compliments, and the concern that is shown. And whereas before, I pretty much expected a certain standard and would not bend to the individual, and it's easier for me to do that. And it's easier for me to step back and say let's look at this a little closer. And I saw that in everybody at the Globe. Everybody treated us that way. And it was just easy.

The key words that Puck used to describe herself before her Shakespeare Lives! experience, “I pretty much expected a certain standard and would not bend to the individual,” revealed that she transformed from a subject-centered teacher who exercised power in delivery to a more consumer-oriented teacher who allows students to set learning goals (Cranton, 1994). Prior to 2005, Puck had “always been the kind of person that gives instructions and says ok, now do it. And there's some kids out there who just don't get it, or just aren't ready to do it at that very moment.” She recognized that students learn differently and allowed them to attempt learning in a way that works for them:

> Well, I just say here's the assignment, and I want it done, and you have this much time. Now, if you're the type that needs to sit here for a minute, you've got a little while. But I want you to understand, I'm not you're mother. And I'm not your great-aunt. And I'm not your fairy godmother. I'm not going to do it for you.

Her changing role from “mother,” or “fairy godmother,” can be illustrated by Puck’s final artifact, a whistle.

> I'm a coach. And I told this to my students, it was after the trip, I said, "I am your English coach, and I will blow whistles every now and then." I'll say that we've got to hit the grammar, and we've got to do the vocabulary. And let's see what we

> can do with this. So, they see that whistle, or I blow the whistle, or they hear that sound and they know what we're moving into. They don't mind it. It's kind of like, this is what we need to do, so we'll do it. We'll humor the old woman and see what happens.

What happened is the creation of an inclusive, engaging classroom.

As Puck moved to a consumerist-oriented teacher, she took risks with curriculum as well. Puck eliminated tests for her Honors English 12 class, whom she described as "students [who] have been competing against each other lo these many years" and are "bone-tired,". Instead, she personally bought copies of five titles that she thought the students would find interesting and assigned them "to dazzle me every, single day by what they read every night." The students "dazzled" her with their interpretations, and parents were delighted that their children found pleasure in reading. Puck confessed, "'I may never do this again. I may get caught. And I might get fired. But it has certainly been worth it." Puck also admitted that she had thought about doing this before her Shakespeare Lives! experience, but never had the courage:

> Nooo, it's not that I'm a rebel. It's not that I am, I...look for rules to break. But I've gotten braver. A lot braver to do things for what I think's important for the students I work with. Something that will make a difference. Because I truly believe those who are in higher positions have been up there for so long that they have no concept of reality and what we grunts do. Sorry. I don't publicize the fact that I don't follow that or I didn't this year. I don't go out and try to make a name for myself because I'm sure there's somebody just waiting in the wings, just waiting to pounce. How can we get rid of this one?

Getting rid of Puck is unlikely. While her colleagues had not adopted her methods or her texts, "three of the ladies said, 'I'd really like a pack of your books for the summer. Can you give me one of each?'" Puck also received a note from her administrator that read, "I

like what you're doing, I don't know what you're doing, but I like it. We've should have sent you to England a long time ago."

When Puck returned from London in 2005, she said, "I'm looking forward to the senior year with the hopes that a, um, more clear understanding of Shakespeare will give them more direction in their lives." She found that she understood her students better:

> I am much more aware of where they are reading aloud. The shy kids are speaking out and wanting to read because I think of all these activities that we all look ridiculous from doing this activity that it eliminates their fears, or almost. I had this kid in the ninth grade who wouldn't speak, now he does. I have these kids that are no longer *if* they graduate, but *when* they graduate, I feel like I've graduated with them.

Puck's students became readers and thinkers, ready to meet the world.

How are the changes manifested in the teacher's pedagogy?

Puck used exercises with a ball to get her students actively involved and to aid her students' focus. She became an adaptive practitioner in that she modified the strategies and used them in a new way. The elements exercise became a morning ritual that grew to include many motions and sounds. Puck's students developed a kick ball game to review literary terms and the plot of *Romeo and Juliet*. Puck took the archer exercise and changed it to a horse's bridle, a more familiar object to her rural students, in order to set goals. The bridle also became a learning device for teaching iambic pentameter.

Puck's simplest response was, "It just works." In an email, Puck explained how Shakespeare Lives! challenged her ideas about thinking and learning:

> SL stopped me in my tracks from the first minute. I had always conducted projects or activities BUT all the many and different activities that are constantly used and reused was honestly a bit too much for me to comprehend. HOWEVER, learn by doing is the ticket! My students can't stop to catch their breaths. Their scores, attitudes, risks taken, opinions given are so much easier to come by.

Although student success was Puck's most important reason for using the strategies, she also experienced a side benefit:

> I learn more and more from my students every single semester. I started seeing with Shakespeare's writing not just through his words, but through their questions, and their responses.

What professional changes does the teacher describe?

In the fall of 2005, Puck claimed, "I'm having the time of my life!" Three years later, she continued "to enjoy every minute, every minute" of teaching. Puck continued to describe the experience as a "dream come true." Puck discovered a passion for not only teaching Shakespeare, but also for the sense of play in the classroom. She encouraged others to seek their passions as well: "I have approached teachers with I have found my little niche, my little desire and lived it. You've got to do that. You've got to dream big and then live it through."

What personal changes does the teacher describe?

The changes Puck described were limited to her classroom.

In what ways are the changes the teacher attributed to Shakespeare Lives! sustained three years after the professional development experience, and in what ways are the changes transformative?

Puck asserted that Shakespeare Lives! "taught me a way of communication that had nothing to do with speaking and has everything to do with listening and reacting." Puck reacted to her students by talking with them "before, during, and after class." She instilled confidence in her students by providing genuine, encouraging feedback. Where Puck once "would not bend to the individual," she became more flexible and coached students because she remembered what it was like to give her best and still have trouble memorizing her lines. Puck became less content-driven and more student-centered as well as "braver" by selecting texts (including Shakespeare) that her students would find interesting and that would help them "to understand what their responsibility in this world is." Puck's transformation was both pedagogical and professional. Pedagogical changes are evidenced by the strategies she continues to use. Her changing philosophy from teacher-driven to student-centered reflected her professional transformation.

Cross-Case Analysis

In the cross-case analysis, I compared the responses of all six teachers and examined the responses coded under "common themes" in order to build an explanation for the types of transformations the teachers experienced (Yin, 2005). The cross-case analysis is organized by the research questions.

Question 1: What pedagogical changes made three years ago do the teachers continue to use?

Table 3 indicates Shakespeare Lives! strategies that the teachers continued to use in 2008. Text cutting is the only strategy common among all teachers. At the initial workshop at UNCSA, teachers and students built a scene telling the story of *The Tempest* using a few lines from each act. At the Globe, teachers participated in exercises using bits of text as well as designed a student workshop using bits of text. Once the teachers returned, each cut a scene from *The Tempest* for the culminating festival. All the teachers led students through this same process of introducing students to Shakespeare using bits of text to assigning students to cut their own scenes. The variety of strategies teachers used indicated teachers' personal preferences. This supports an assertion made by the Shakespeare Lives! program: "Each individual person comes away with a moment of insight. Each person has a different one" (Malcolm, 2007, p. 8). Each teacher utilized strategies that specifically worked for their curricular and student goals.

Table 3 Summary of Strategies Teachers Used Three Years After the Shakespeare Lives! Experience

	Ball toss	Build a boat	Character games	Elements	Ensemble	Scene performance	Status	Tableaux	Text-cutting	Visualization
Benvolio			√		√	√	√	√	√	
Beatrice	√			√	√			√	√	
Cordelia		√	√	√	√	√			√	√
Ariel				√	√	√			√	
Kate					√	√			√	
Puck	√	√		√					√	

While one teacher initially implemented the strategies in order to fulfill the requirements of the program, all of the participants continued using performance-based strategies during the three years after the program experience because students became actively engaged with the literature.

Quesiton 2: What professional changes do the teachers describe?

The teachers who experienced professional change described those changes in terms of student choice, of a sense of play, and of authentic relationships.

All four teachers gave up some control by allowing their students to make choices in how they present their learning. This indicates a perspective transformation in the view of the teacher maintaining control over student learning. In doing so, the teachers allowed students to make their own mistakes and make adjustments accordingly. For example, Beatrice allowed her students to participate in a student-generated pie-pan band for a

performance of *Romeo and Juliet*. When every student wanted to play, she let them, which resulted in "noise." The students made the decision to allow a few people to play in the band. Ariel changed from being a "control freak" who made all decisions related to student learning to a reformist teacher (Cranton, 1994) who allowed students to select their products of learning. As a result, she developed multiple plans in order to address student choices.

Hamlet said, "the play is the thing wherein I'll catch the conscience of the king." Beatrice and Puck could say "to play is the thing wherein I'll develop students' learning." Beatrice asserted that games such as ball toss and musical tableaux not only made learning fun for students, but also helped them to remember important content and allowed them to think critically about characters and themes. Consequently, Beatrice intended to share her philosophy of play with her colleagues in her role as literacy facilitator. Puck also utilized play as a result of her Shakespeare Lives! experience. Whether students built boats, galloped on horses, or developed warm-ups, they utilized their imagination. A benefit of play was not only the development of symbolic thinking, but also of camaraderie.

The final professional change took the form of authenticity. Beatrice, Ariel, Kate, and Puck communicated with their students on a more personal level in a genuine exchange of ideas. Beatrice described how her students helped each other come to terms with a classmate's suicide. When Ariel began communicating with her "heartvoice," she came to know her students better and they viewed her as being "real." Kate shared her fears of stage performance with her students and also showed genuine concern for her

students. The authentic communication in her classroom resulted in at least one student's transformation in the way she viewed herself. Benvolio and Cordelia did not indicate a conscious change in philosophy or change in relationships; therefore, I did not categorize them as experiencing a professional change.

Question 3: What personal changes do the teachers describe?

In 2005, Cordelia and Ariel shared personal changes as a result of their Shakespeare Lives! experiences. In 2008, Cordelia's personal transformation had not been sustained; she made little references to personal transformation. However, Ariel referenced continued personal transformation in that she recognized when she need to find balance between work and self. When she felt she gave too much to work, she gave herself "permission to gather" or find ways to renew her energy. Kate, who did not indicate personal changes in 2005, recognized over time that she experienced personal changes as a result of Shakespeare Lives!. She became "a more aware person" who embraced "self-growth." Benvolio, Beatrice, and Puck did not reference personal changes.

Central Question: In what ways are the changes teachers attributed to Shakespeare Lives! sustained three years after their professional development experience, and in what ways are the changes transformative?

The data suggest that all the teachers experienced sustained pedagogical transformation because they continued to use and/or adapt the performance-based

strategies. The teachers preserved the strategies that mattered to them in 2005. While the strategies that teachers used varied for the most part, all the teachers continued to utilize text cutting. All of the teachers shared the initial assumption that Shakespeare's plays should be read in entirety; however, all demonstrated a transformation in their assumption by utilizing text-cutting.

Four teachers sustained professional transformation in that they "created positive connections" with and among students and "developed deep learning" for their students (Hargreaves and Fink, 2006). Beatrice, Ariel, Kate, and Puck modeled authentic communication with their students, and in Beatrice's case, the students engaged in authentic communication with each other. The teachers attributed performance-based strategies with students' deepened understanding with literature, particularly in how students connected literature with their own lives. For example, Beatrice's students connected Romeo's and Juliet's suicides as a resolution to their problems with a classmate's suicide. The students concluded that they need to connect to others on a more personal level, which could prevent such tragedies. This example supports Cranton and King's (2003) assertion that when learners share their authentic selves, they come to understand each other better, which is necessary for effective teaching. Because students experienced learning more actively and authentically, some saw new possibilities for their futures. Beatrice's students who participated in the 2005 festival are planning to pursue their education at a community college. Kate's student decided to become a teacher and sought ways to make a college education possible.

Two teachers, Ariel and Kate, experienced personal transformation. Both gained

more confidence in their abilities.

Table 4 provides a summary of the types of transformation each teacher experienced.

Table 4 Summary of Participants' Types of Transformation

	Pedagogical Transformation	**Professional Transformation**	**Personal Transformation**
Benvolio	■		
Beatrice	■	■	
Cordelia	■		
Ariel	■	■	■
Kate	■	■	■
Puck	■	■	

In looking at the types of transformation that teachers experienced, the data suggest that transformation occurs at three levels (See Figure 2). In order for a teacher to experience professional transformation, teachers must first experience pedagogical transformation by implementing and/or adapting the strategies in their methodology repertoire. I categorized teachers as experiencing professional transformation if they indicated a conscious change in teaching philosophy or relationships with students. The deepest level of transformation is personal transformation.

Summary

This chapter provides rich descriptions of each teacher or case. The cross-case analysis revealed that all of the teachers experienced pedagogical transformation, four teachers experienced professional transformation, and two teachers experienced personal transformation.

CHAPTER V

CONCLUSIONS

The combination of a stateside institution like NCSA, the Globe in London, a funder like Kenan, and a hungry group of dedicated teachers has ensured that Shakespeare Lives! has been a important learning experience for all and one that will not be a "violent fire" that soon "burns out itself." (Spottiswoode in Malcolm, 2007, p. 3).

This study grew out of a pilot study with seven teachers from rural, low-wealth counties in North Carolina who participated in the Shakespeare Lives! teacher professional development program in 2005. Findings in the pilot revealed that all teachers reported changes in their pedagogy as a result of their participation in the program, two described professional changes (namely changes in teaching philosophy), and two teachers experienced personal changes. The purpose of this collective case study was to determine whether the changes that teachers initially reported in 2005 were sustained three years after the professional development experience, as well as whether these changes were transformative. Data was analyzed through the theoretical lens of transformative adult learning theory (Dirkx, 1997, 2001; Mezirow, 1990, 1991, 1997).

Summary of Findings

All six teachers sustained the pedagogical changes that they reported in 2005. All teachers continued to utilize text-cutting, and five of the six teachers practiced ensemble work (all students involved in a performance). The variety of other strategies used indicated teachers' personal preferences. Four teachers experienced professional transformation in that they experienced a change in teaching philosophy and in that they communicated authentically with students. Two teachers described personal changes, which indicated personal transformation.

Discussion

In this section, I provide the implications of this study's findings, including identifying the characteristics of Shakespeare Lives! that could be transferable to other professional development programs. In addition, I discuss the hierarchical nature of the transformations teachers experienced and the significance of the transformations that occurred once the teacher returned to the classroom.

Implications for Teacher Professional Development

This study uncovered the following implications for professional development: it should

- Take place away from school.

- Build on teacher knowledge and expertise.
- Be extended over time.
- Provide implementation support.
- Engage participants on a personal level.

The teachers' responses indicate Shakespeare Lives! incorporated characteristics of effective professional development. Perhaps the most powerful characteristic is also one that is not transferable: the context of Shakespeare's International Globe Theatre. All the teachers found being immersed in the culture of the Globe and performing on the Globe stage invigorating and meaningful. Although the unique opportunity provided by the International Shakespeare's Globe Theatre cannot be replicated, the experience can be replicated. As Benvolio pointed out, learning away from school has its merits. Professional developers and schools should consider locations away from school. Off-campus sites removes teachers from the distractions of school and places them in an open frame of mind. In addition, the professional developer should attend to the learners' needs and engage them personally.

Other elements of the Shakespeare Lives! program show promise and could be transferable to teacher professional development programs. Teachers alluded to previous professional development experiences that operated under a deficit model (Feiman-Nemser, 2001); a deficit model assumes that teachers lack skills. However, teachers in this study appreciated that Shakespeare Lives! and Globe practitioners not only valued, but also built on their expertise. Professional development educators should find ways to build on teachers' knowledge and expertise.

Workshops at UNCSA sandwiched the teachers' professional development at the Globe. In the summer and in the fall of 2005, teachers brought two to four of their students to workshops held at UNCSA. Side-by-side, teachers and students participated in drama games, performed scenes, and reflected about the day in group discussions. Teachers immediately saw how students responded to the performance strategies, leaving little room for teachers to respond, "but this won't work with *my* students."

Through participating in workshops with their students at UNCSA, observing Globe practitioners leading student workshops, immersing themselves in the performance strategies, and conducting a workshop with London students helped teachers to connect their professional development experience to their teaching contexts (Bransford, Brown & Cocking, 2000; Darling-Hammond & McLaughlin 1995). Through these experiences, teachers learned with students, observed an expert using the strategies with students, observed a culminating performance with special needs children, and tried the strategies in a safe environment before returning to their own classrooms. This careful scaffolding, along with opportunities to reflect at each level, deepened teachers' understanding of ways to implement the strategies with their students, "enabl[ing] [them] to make the leap from theory to accomplished practice" (Darling-Hammond & MacLauglin, 1995). Other professional development programs could build in opportunities for teachers to observe master teachers who have implemented program objectives as well as experiences that allow for teachers and their students to learn together.

Shakespeare Lives! also built in scaffolds of support over time (Duffy & Kear, 2007; Feiman-Nemser, 2001; Garet, Poerter & Desimone, 2001; Hilliard, 1997). Once

teachers returned to the classroom in the fall, they participated in planning meetings with Shakespeare Lives! practitioners as well as in workshops with their students at UNCSA. Each teacher was assigned a mentor, someone who participated in the program earlier. The mentor and the curator of the program visited each teacher's classroom and worked with both teachers and students utilizing the strategies. Three teachers cited that bringing their students to UNCSA to perform a scene from *The Tempest* continued to be "thrilling" or "proud" moments in their careers because of the positive impact the experience had on their students. Requiring teachers to participate in the performance festival not only built in accountability for implementing the program, but also created the opportunity for sustainability. Teachers cited that they continued using the strategies because "they worked" in engaging students with literature and with each other. Professional developers should consider ways to provide coaching to teachers once they return to the classroom as well as opportunities for teachers and students to showcase their implementation.

Implications for Transformative Adult Learning

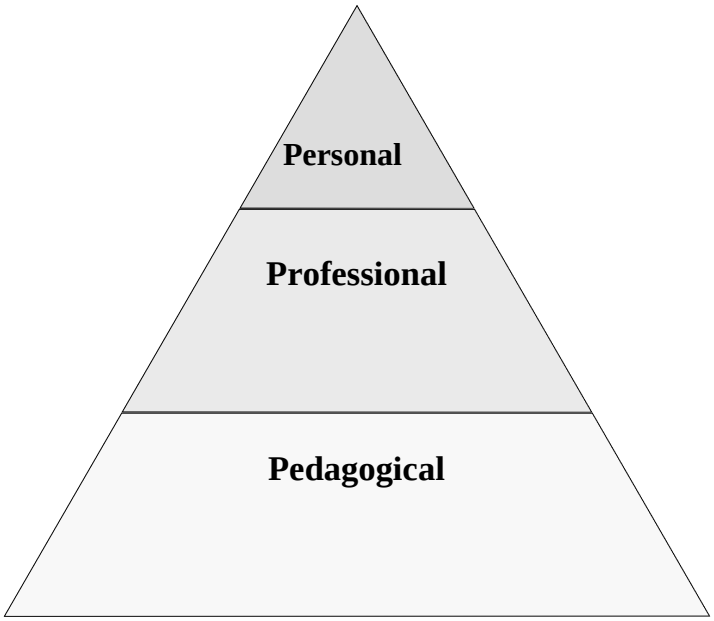
The findings also offer insights into the nature of transformative adult learning. All of the teachers cited working with practitioners Glynn Macdonald and Stewart Pearce as meaningful experiences. The teachers noted how Macdonald and Pearce engaged with them authentically, making them feel valued not only as professionals, but also as people. These practitioners worked to help the teachers to "reflect who [they] truly and completely are" (Pearce, 2005, p. 52). It is possible that Macdonald's and Pearce's

models of authentic communication led to teachers' professional transformations in the genuine connections they made with students. Three of the teachers identified instances of communicating with their students through "heart." This finding suggests that bringing such quality experts to the professional development site can accomplish the same effect.

As mentioned earlier, workshops held at UNCSA provided the opportunity for teachers and students to learn together. Placing teachers in the position of co-learner with their students may have led to teachers' professional transformations. Four teachers in the study formed collegial relationships (Cranton, 2006) with their students by becoming co-learners with them. The findings suggest that providing opportunities for teachers to learn with students may not only provide effective professional development, but may also be effective for transformative learning.

The data suggest that pedagogical, professional, and personal transformation is hierarchical in nature (see Figure 3). For example, the two teachers who experienced personal transformation also experienced professional and pedagogical transformation. Teachers who experienced professional transformation also experienced pedagogical transformation.

Figure 2 Hierarchy of Transformation



In 2005, all of the teachers reported pedagogical changes resulting from their Shakespeare Lives! experience. Two identified professional changes and two shared personal changes. The findings of this study indicate that all of the teachers experienced pedagogical transformation. However, in the interim, only two teachers' transformation remained the same. One teacher who experienced pedagogical transformation continued to use Shakespeare Lives! strategies primarily in teaching the genre of drama. The other teacher continued to describe pedagogical, personal and professional transformation. One teacher regressed in her transformation and three teachers moved up one or two levels of transformation.

Perception plays an important role in transformation. The teacher who regressed in transformation described personal transformation in 2005, but only demonstrated pedagogical transformation in 2008. She expressed concern over sustaining the changes in her teaching that resulted from her Shakespeare Lives! experience. She feared the reactions of her department chair and principal to her students "getting out of their seats." She also admitted that as the passage of time separated her from the "invigorating source" of Shakespeare Lives!, which may be why she used fewer strategies. This teacher's perception of authority figures is different from her colleague's. Her colleague perceived that her administrator supported the use of performance techniques, and she did not hesitate to send her students into the hallways to enact those strategies. These findings suggest that support may enhance transformation, and a perceived lack of support may hinder it. Therefore, professional developers need to build scaffolds of support during implementation.

Dirkx (personal communication, June 27, 2008) views transformative learning through the Jungian lens of individuation--becoming aware of who we are as individuals. This process is ongoing and lifelong. The findings in this study reveal that three teachers experienced continued transformation in the interim between the pilot and this study. All three teachers described professional transformations including establishing collegial and authentic relationships with students and sharing control of learning experiences. One of the three teachers also transformed personally in that she gained more confidence and became "a more aware person," who experienced self-growth" and improved her "communication with other people."

Shakespeare Lives! operates under the belief that in order to change the teaching of Shakespeare, the teacher must experience change. Teaching for transformation is more than changing teacher practice; it also involves addressing the philosophical and personal qualities of the teacher. Based on these teachers' responses, deeper transformation may enhance the sustainability of the professional development. The findings suggest that utilizing strategies identified as effective for teacher professional development and for transformative learning can lead to teacher transformation that can be sustained over time. Professional developers may consider teaching for personal transformation in order to make substantive change in teachers' classrooms.

Suggestions for Further Research

In this section, I point to questions that the findings of this study raise for both sustaining teacher professional development and for sustaining transformation.

What conditions are necessary for sustaining professional development?

The findings of this study suggest that situating teacher professional development in the reality of the teachers' teaching experience, namely teachers learning in the ways that their students will learn, sets the stage for sustainability of implementation in the classroom. Building in accountability (teachers were required to participate in a culminating festival) and support (from both the program's mentors and teachers' administrations) contributed to sustainability. A more systematic examination of these

factors needs to occur in order to pinpoint variables that directly influence teachers' continued implementation of professional development learning. What conditions are necessary for sustaining transformation?

It is not clear whether teachers' experience influenced transformation. Five of the six teachers were career teachers in 2005. The youngest teacher, who had only three years experience, did not experience professional or personal transformation once she returned in the classroom. This may be due, in part, to her perception of her administration.

Qualitative educational research is messy in that so many variables come into play. I cannot pinpoint the exact causes of teachers' transformations. It appears that transformations could have been sparked by authentic experiences at the Globe Theatre in London. In addition, teachers learning alongside students and sharing the culmination of that learning beyond the classroom context may have supported transformation. More investigation is needed into what conditions are necessary to not only initiate transformative learning, but also into what deepens and sustains it—not only during the professional development experience, but also during the implementation and beyond.

The findings suggest that the teachers reinterpreted Shakespeare Lives! professional development experience as they moved into their classroom contexts. A closer examination of what happens in the teaching context and how those experiences inhibit or continue teacher transformation can yield important data that informs sustainability.

What is the relationship between teachers' transformation and student learning?

While the findings indicate that teachers were transformed pedagogically, professionally, and/or personally, this study did not explore how the teachers' transformations impacted student learning. More research is needed in how changes teachers' experience as a result of professional development impact student learning.

Summary

This study sought to explore the changes the teachers attributed to their professional development experience with Shakespeare Lives! was sustained over time and whether those changes were transformative. The findings indicate that Shakespeare Lives! provided effective professional development with lasting influence in the teachers' classrooms. Findings show that all six of the teachers transformed their pedagogy in teaching Shakespeare, and five of the six teachers adapted the strategies to other literary genres. The findings also suggest that transformation appears to occur at three levels beginning with pedagogical, moving to professional, and culminating with personal. Shakespeare Lives! utilizes promising strategies that can be transferred to other professional development opportunities. Such strategies for sustaining professional development and transformative learning include immersing teachers in strategies that they will use with students, communicating authentically, providing learning opportunities where teachers and students learn together, and providing implementation support. Further research that explores the conditions for sustaining professional

development and transformation as well as the relationship between teacher transformation and student learning is needed.

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APPENDIX A: DATA COLLECTION SCHEDULE

May 18, 2008	Emailed confirmation letter to participants
June 1, 2008	Emailed individual quick-write prompts to each participant
June 1-July 3, 2008	Conducted face-to-face interviews
June-August, 2008	Transcribed interviews
June20-August 8, 2008	Emailed follow-up questions and transcript member checking
July 15-December 30, 2008	Data analysis using NVivo8 and member checking of case-by-case findings

APPENDIX B: EMAIL CONFIRMATION

Greetings <<Teacher's Name>>,

I want to thank you again for your willingness to participate in my dissertation study. This study will serve as a continuation to the 2005 pilot study you participated in.

The purpose of this collective case study will be to explore the sustainability of seven teachers' initial transformations resulting from their experience three years after their participation in the Shakespeare Lives! professional development program.

Central Question: In what ways are the changes teachers attributed to Shakespeare Lives! sustained three years after their professional development experience and in what ways are the changes transformative?

Sub questions:

4. What pedagogical changes made three years ago do teachers continue to use?
5. How are the changes manifested in teachers' pedagogy?
6. Why do teachers continue to use the strategies (or not)?
7. How do the teachers describe what Shakespeare Lives! experiences mean for their lives and work three years later? (King 2004).

I will be collecting 4 types of data from you. Before I come to visit, I would like for you to complete a 5-minute quick-write and email it to me. I will send you a prompt that will read like this: *Three years ago, you said _____. What do you think now?* In addition, I would like for you to bring to our interview 3-5 artifacts that represent you and your teaching the past three years. An artifact can be most anything such as a journal, a poster from your classroom, a photo, a student response, a lesson plan. When I come to visit, I will ask you to describe the artifact and why you selected it. In addition, I will be audio recording our conversation using a digital recorder. I will also be taking notes in case the recorder malfunctions. Once I transcribe the interview, I will send you the transcription in case you wish to make any corrections. Also, with your permission, I may send follow-up questions with the transcripts that you may answer in an email response.

I look forward to seeing you again on <<date>>, <<time>>, at <<place>>. I have one final request, will you please look over my directions from Mapquest to ensure I find you?

Thanks,

Lynne Murray

APPENDIX C: INTERVIEW PROTOCOL

Opening Question: What has been going on with you in the last three years?

Main Questions:

- Please tell me about your artifacts.
- What has been your experience teaching Shakespeare since you participated in Shakespeare Lives!?
- Are there ways that you have adapted things you learned? If so, can you provide an example?
- What were your most meaningful and least meaningful experiences with Shakespeare Lives!? What made _____ your most memorable and _____ your least memorable?
- How have your colleagues and administration responded to you using performance strategies?
- How have your students responded to the performance strategies?
- In 2005, you said _____. Do you find this to still be true for you?

Possible Probes (Rubin & Rubin 2005):

- That's interesting; can you tell me more?
- Can you provide a specific example?
- What happened next?

Closing question: Is there a question I should have asked you, but didn't?