CREATING CONSULTEE CHANGE:
A THEORY-BASED APPROACH TO
LEARNING AND BEHAVIORAL CHANGE
PROCESSES IN SCHOOL-BASED
CONSULTATION

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To improve schools, educators must develop the capacity to implement instructional and behavioral interventions that differ from those typically employed. Yet, the central problem of building educator capacity is not determining what to implement. The central issue for improving schools is rather to find ways to help educators identify, implement, adapt, and sustain effective practices. School-based consultation could provide the means to elicit and support new behaviors, competencies, and dispositions among educators. However, little attention has been directed at fundamental consultee learning and behavioral change processes that lead to different teacher behaviors and improved student outcomes. Exceptional professional learning (EPL) is a comprehensive consultation model that attends specifically to the processes and mechanisms of consultee cognitive, behavioral, and motivational change. The model is grounded in positive psychology and self-determination theory, constructivist and socioconstructivist learning theory, situated cognition, and distributed practice. It provides a coordinated framework to elicit and sustain changed cognition and behavior among consultees. The explicit theoretical grounding provides mechanisms of conceptual change; development of content, contextual, and pedagogical knowledge; and attention to motivation and sustainability. Consultation based explicitly on learning and motivational theory is advantageous because assumptions and approaches are testable, consultation strategy selection is guided by more than clinical judgment, and the model can adapt to incorporate

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There are approximately 49.2 million students in U.S. public schools taught by 3.2 million teachers who work in 13,629 school districts (National Center for Educational Statistics, 2011). About 45% of public school students are eligible for free and reduced lunch programs. In 2008–2009, approximately 6.5 million (about 13%) students were in special education programs. By 2050, the U.S. Census Bureau (2008) projects that 62% of U.S. children will be from ethnic “minority” groups. Against this demographic backdrop, schools are being required to improve instructional practices to meet new legislative demands, national economic conditions, and global needs for highly skilled workers. Although Birman et al. (2007) estimated that the U.S. federal government spends billions of dollars each year on educator professional development, that effort yields few returns on the dollars invested. Most key indicators of educational improvement have not increased substantially (e.g., high school graduation rates, achievement). This is especially true for students with disabilities, and/or those who are members of culturally or linguistically diverse groups (Lee, 2002).

The majority of schools provide a quality education to most of their students, and teachers are generally caring and skilled. However, many of these same schools do not meet the current needs of diverse learners and are ill prepared to meet new demands. In other words, existing pedagogical, behavioral, motivational, and assessment methods in public education must change and adapt to evolving student demographics, political climates, educational policies, and economic contexts. Consequently, public education provides tremendous opportunities for school-based consultation (SBC) and effective professional development because the needs of schools are great, pressure to change practices is building, and current school improvement efforts have not been particularly effective.

As the key interface with students, teachers play an integral role in school improvement. Building teachers’ capacity to implement evidence-based pedagogical, behavioral, and assessment methods that differ from those that most schools use today is necessary because schools will not improve unless teachers change their practices. Supporting teacher change through SBC and teacher professional development (we prefer the term professional learning [PL]) could provide the critical means to transmit and support new educator behaviors, competencies, and dispositions. Indeed, there is a large and growing body of educational, psychoeducational, and multidisciplinary research that provides potentially effective, culturally relevant prevention programs, instructional technologies, interventions, and organizational structures designed to address many of the challenges faced by educators. Such evidence-based practices can be adapted site-by-site to address the needs of children in most communities.

Yet, the central problem of building school capacity is not determining what to implement. Instead, schools and teachers must change how they think, what they do, and how they evaluate the results of their efforts. The key to school improvement is finding ways to help educators identify, implement, adapt, and sustain effective practices. In other words, improving schools is predicated on finding ways to facilitate conceptual and behavioral changes in educators.

**Exceptional Professional Learning**

**Overview and Purpose of Exceptional Professional Learning**

Over the past 15 years, Truscott and colleagues have developed and implemented a theoretical approach to SBC and PL that is focused explicitly on creating and supporting conceptual and behavioral change in consultees and educators. We now call this approach exceptional professional
learning (EPL). Figure 1 is a visual depiction of the key practical and theoretical elements of the EPL model. The figure represents the interrelatedness of the theoretical underpinnings and practices used to enact it. The underlying theories and enacted components in Figure 1 will be described in detail below.

The overall purpose of EPL is to facilitate evidence-based changes in the ways educators identify, implement, adapt, and sustain effective educational and behavioral practices. To facilitate and support educator change, EPL incorporates explicit attention to theories of learning and motivation, grounded in what is known about effective SBC and PL practices. In our experience, EPL is useful as a response to common educational concerns (e.g., poor reading achievement) and as a way to increase effectiveness of specific processes in schools (e.g., Functional Behavioral Assessment [FBA], linking data to instruction).

In EPL practice, we establish naturally occurring learning groups (e.g., grade-level, subject area, common problem, common student) that engage in collaborative problem solving, an example of the relatedness concept in Figure 1. We use case studies to situate the consultation problem solving in authentic contexts (i.e., focused on practical classroom or organizational issues) and actively engage consultees with problems and materials from their classrooms and schools, an example of the authenticity concept in Figure 1. We focus consultation content and applicable pedagogy on evidence-based practices in response to participant-generated assessment of the issues, examples of
the autonomy and responsiveness concepts in Figure 1. We provide support visits to assist and monitor learning as the consultees implement new practices, and assess the results of their actions, and use this information to inform subsequent EPL activities, an example of the responsiveness concept in Figure 1. Throughout the process, EPL consultants seek to provide prolonged and distributed learning activities that support consultees as they proceed through the process of conceptual and behavioral change, an example of the distributed practice concept in Figure 1. Many of these practices could happen within other SBC approaches. What sets EPL apart is that we strategically and explicitly emphasize these practices in a comprehensive approach to elicit consultee changes in learning, motivation, and behavior.

To date, we have used EPL with teachers from Grades K–8 and with educational specialists Grades K–12. EPL projects take time to implement (typically 1–2 years) because the process of developing and supporting changes in consultee knowledge, skill, confidence, and competence cannot be accomplished quickly. From a practical standpoint, EPL projects typically begin over the summer or fall, to allow participants enough time to develop their case studies and skills within the school year.

EPL Foundations and Rationale

School-based consultation. EPL is derived from the traditions of consultee-centered (Caplan, 1970) and organizational consultation (e.g., Schmuck, 1995) as applied to schools and educators. Generally, SBC is an indirect service delivery model that involves two or more parties working together to benefit students (Truscott & Albritton, 2011). Typically, the SBC relationship is triadic and a school specialist (e.g., school psychologist) provides consultative support to a teacher (i.e., consultee) who works directly with the student of concern (i.e., client). The focus of SBC may include an individual student (student-focused), group of students (classroom-focused), or even the whole school (school-focused; Meyers, 1973). However, the consistent twofold intent of SBC is to address the immediate student concerns and to provide the teacher with the skills, knowledge, confidence, and objectivity necessary to successfully and independently address similar future situations (Caplan, 1970; Meyers, 1973). All SBC approaches attend to the relational processes between consultants and consultees, and to the student outcomes of working to resolve the presenting issues. Consequently, skilled school-based consultants serve children by using problem-solving methods to assess the presenting student issues and the skills, knowledge, confidence, and objectivity of the consultee (Caplan, 1970; Rosenfield & Gravois, 1996).

From its beginnings in the 1960s and 1970s (Bergan, 1977; Caplan, 1970; Meyers, 1973), the concept of an indirect transfer of service to students through SBC with teachers has become an established discipline (e.g., Erchul, 2011; Gutkin & Conoley, 1990). Diverse fields like special education, school psychology, general education, and school counseling all include SBC as a major service delivery option. SBC models range from experts delivering services through teachers (e.g., Bergan, 1977; Caplan, 1970) to more egalitarian approaches focused on collaborative efforts and shared responsibilities (e.g., Caplan & Caplan, 1993; Idol, Nevin, & Paolucci-Whitcomb, 1994; Meyers, Parsons, & Martin, 1979; Rosenfield & Gravois, 1996). Consultee-centered SBC emphasizes developing the knowledge, skill, confidence, and objectivity of the teacher (Caplan, 1970; Meyers, 1973; Rosenfield & Gravois, 1996) over direct prescriptions of interventions to address the students’ presenting problems. Organizational consultation (e.g., Schmuck, 1995) has also been applied in SBC.

Professional learning. Although consultee-centered and organizational SBC form the primary foundation, EPL also includes elements of teacher PL. In-service teacher education and professional development have long been associated with SBC (e.g., Meyers, 1973) and are common parts of school-based organizational consultation and organizational development (e.g., Schmuck, 1995; Stollar, Poth, Curtis, & Cohen, 2006). Generally, the focus of such PL is on developing educators’ skills in a particular area or topic. Students are the indirect clients in PL projects, because the goal of PL is to improve educational practices by enhancing educators’ skills and knowledge. However, educator PL typically focuses on improving educational practices generally, rather than on identifying a specific child or group of students.
Desimone (2009), who provided a recent comprehensive review of the educational literature on PL, identified five common features of effective PL. These features include: content focus, active learning, coherence, duration, and collective participation. PL that is content-focused provides participants with opportunities to complete activities that focus on subject-matter content and how students learn that content. Active learning occurs when participants actively engage with materials and methods so that they may provide formative and summative feedback about the PL, analyze student work, implement the results of those analyses, and present results to their colleagues. PL is coherent when it is consistent with school and/or district level policies and is aligned with teacher knowledge and beliefs. Effective PL is of sufficient duration when it consists of at least 20 hr of training. Collective participation is accomplished by organizing participants into groups of teachers from the same grade level, subject, or school who collectively engage in the PL activities.

Unfortunately, most PL projects do not include these elements and, instead, are ill conceived and poorly delivered (Consortium for Policy Research in Education, 1996; Easton, 2008). Traditional in-service training relies heavily on brief stand up and deliver didactic presentations accompanied by handouts and massed practice using analogue situations (Hughes, Cash, Klingner, & Ahwee, 2001; Truscott & Truscott, 2004), and thus creates participant learning environments that are episodic, fragmented, and disconnected from the real problems of practice (Wei, Darling-Hammond, Andree, Richardson, & Orphanos, 2009). With just a few hours of workshop training and no follow-up, teachers are expected to implement the presented strategies in their classrooms.

Our experiences researching SBC in the context of prereferral intervention teams, supervising school psychology practicum placements, and observing school practices reflect similar problems (e.g., Slonski-Fowler & Truscott, 2004; Tarquin & Truscott, 2006; Truscott, Cohen, Palmeri-Sams, Sanborn, & Frank, 2005; Truscott, Cosgrove, Eidle, & Meyers, 2000). SBC is frequently delivered quickly, with little attention paid to the context and skill of the consultee, and offers cursory “solutions” to complex problems with little follow-up or support of consultee efforts. Such techniques have been criticized as reflecting an old paradigm of teaching and learning that discounts the complexities of teaching within a social context (Little, 1993), resulting in a “disconnected and decontextualized set of experiences” (Stein, Smith, & Silver, 1999, p. 239) that are easily forgotten. Although the parameters regarding which PL and SBC approaches work best in specific circumstances are not yet clear, there is wide agreement that there remains a profound shortage of effective teacher support.

Rationale for EPL. Even if existing SBC and PL efforts included the components recommended in textbooks and articles, real changes in teacher and school behavior might occur infrequently because little attention has been paid to the mechanisms that must undergird internalized and sustained changes in teacher content knowledge, pedagogical knowledge, contextual knowledge, and motivation. As Gutkin and Conoley (1990) have made clear in reference to school psychologists, to help children, school-based consultants must learn how to influence adults. However, although a large body of research and opinion about SBC techniques, approaches, and effectiveness has evolved over the years, there is little empirical research or theory about the fundamental consultee learning and change process models that underlie SBC. Similarly, there is a large body of scholarship and research about teacher professional development, but limited empirical research or theory about the fundamental learning and change processes involved.

There is reason to believe that changes in SBC and PL techniques alone cannot overcome existing educator misperceptions that resist change efforts (e.g., that the problem is located within the child rather than in the instructional match), yet these misperceptions must be changed for conceptual learning to occur (e.g., Strike & Posner, 1992). The implicit assumption evident in many recent books and articles on SBC, PL, and more recent approaches to students with learning problems, such as response to intervention, is that certain activities (e.g., collaborative groups, lesson study, coaching, performance feedback, progress monitoring) will result in change. There is little doubt that current practices need improvement. However, changing school practices is unlikely to be successful if the changes are not guided by testable theory that includes information about teacher learning and sustaining new behaviors.
It is our contention that attention to the mechanisms of change could allow researchers to examine the processes that result in internalization and sustained implementation of new behaviors. Such attention could also identify the salient characteristics of teacher support that create and sustain changes that impact instruction and student outcomes. Understanding underlying mechanisms could allow conceptualization of the change process from initial cognitive dissonance through development of declarative and procedural knowledge to motivation to implement and sustain new behavior. Understanding change mechanisms could also provide information about when change is not possible because participants’ existing misperceptions remain unchallenged. Developing theory that explicates the fundamental processes in SBC and PL is important because such theory is testable (either in whole or in part), can guide research and practice, and can be used to evaluate techniques and approaches to determine whether they are productive or counterproductive to broader goals. EPL is a theory-based approach to SBC that has been implemented in a variety of contexts and may inform SBC and other consultation-related efforts.

Theoretical Rationale for EPL

In the remainder of this article, we present the theoretical rational for EPL, link the underlying theory to EPL components that are enacted in projects, and describe how EPL is implemented and practiced. We will then summarize the preliminary evidence from EPL projects. Finally, we will identify problems experienced when implementing the model.

Posner, Strike, Hewson, and Gertzog (1982) presented a theory of conceptual change for children who are learning science concepts. The theory rests on constructivist conceptualizations of learning as systems of assimilation or accommodation, with accommodation leading to new conceptualizations. The theory has been expanded to other science and mathematics learning situations. In EPL, we are developing a similar system of conceptual and behavioral change for educators using positive psychology and self-determination theory (SDT), constructivist and socio-constructivist learning theory, and distributed practice to describe systems of cognitive assimilation, accommodation, learning, and situated practice leading to internalized and sustained changes in classroom practices (e.g., Psimas et al., 2009; Truscott, Daly, & Peterson, 2005; Truscott et al., 2000; Truscott, 1998; Truscott & Truscott, 2004). Although our target is adult educators, many of the ideas in Posner et al. (1982) are present in our framework, with additional attention paid to motivation and sustainability of the behaviors derived from changed conceptualizations.

Positive Psychology and SDT

Positive psychology (e.g., Seligman & Csikszentmihalyi, 2000) and, in particular, SDT (e.g., Ryan & Deci, 2000) provide the theoretical rationale for (a) developing social climates that foster strengths, (b) shifting teacher PL and SBC from fixing unsuccessful students to building knowledge and confidence about improved teaching practices, (c) conceptualizing teachers as active decision-makers who can, and should, exercise choice, and (d) using the power of authentic social context and construction for sustained applications of teaching and learning. We start with positive psychology and SDT because it is important to understand why participants might change their conceptualizations and behaviors, and what might sustain any new and emerging changes.

Positive psychology offers an optimistic view of human beings. In the EPL framework, this translates into the basic assumption that most teachers want to teach well and reach as many children as they can. Most teachers will consequently seek to incorporate improved teaching methods if impediments to improvement are removed (Meyers, 1989; Truscott & Truscott, 2004). Positive psychology gives consultants some ways to attempt to construct authentic contexts that foster both the development and sustenance of positive affective states that are related to job effectiveness and competence (Seligman & Csikszentmihalyi, 2000). However, it would be naive to think that EPL is powerful enough to elicit positive change from all teachers. As noted by Caplan (1970), in some situations administrative or supervisory responses are more appropriate than consultation. In others, structural forces such as shifting administrative attention and budget cuts undermine teacher efforts...
Consultee motivation. The onus on consultants using EPL is to assess the internal and contextual variables of participants and to provide strategic action and supportive structures to meet their needs and diminish impediments. Ryan and Deci (2000) presented considerable evidence across a variety of contexts that participation in social situations that foster proactive engagement can enhance people’s psychological development, motivation, and subjective well-being. These ideas are related directly to Cowen’s (1991) suggestion that social institutions can be constructed to promote “wellness” and Lubinski and Benbow’s (2000) position that it is possible to develop targeted institutional contexts that enhance development and potential in people with specific interests and skills. Using these ideas, we deliberately employ collaborative teacher teams and consultant—consultee interactions to develop social contexts that enhance engagement, proactive skill development, and enhance participants’ internal motivation and self-perceived competence.

Consultee competence and confidence. EPL consultants actively seek to recognize consultee competence and confidence. Building knowledge, confidence, and competence are critical because SDT suggests that people have three fundamental needs—competence, relatedness, and autonomy—that are essential to human well-being and optimal functioning (Ryan & Deci, 2000). Social structures (including SBC and PL projects) can be deliberately constructed to provide opportunities for people to meet these needs and thereby positively to influence participants’ intrinsic motivation, commitment, and self-regulation of behavior (Ryan & Deci, 2000; Seligman & Csikszentmihalyi, 2000). In EPL, constructing social contexts that support development of competency, knowledge, and confidence enhance teachers’ motivation to work with difficult-to-teach children, to persist in efforts to improve instruction, and to commit to long-term PL because these contexts provide new learning to replace existing misperceptions and supportive social mechanisms to overcome resistance to changing conceptual misperceptions. This supposition is supported by a large body of research that links teachers’ positive perceptions of self-efficacy to improved instructional practices and student outcomes (e.g., Ashton & Webb, 1986; Flink, Boggiano, & Barrett, 1990; Pelletier, Seguin-Levesque, & Legault, 2002). Students whose teachers support their autonomy have greater intrinsic motivation toward learning and evidence greater effort, conceptual learning, academic performance, and intention to persist in school (Grolnick & Ryan, 1987; Grolnick, Ryan, & Deci, 1991; Pelletier et al., 2002).

These same social contexts support changes through difficult early periods when it is easy to revert to past practices (Strike & Posner, 1992). SDT acknowledges that people have the intrinsic need to be autonomous, and that creating opportunities for people to make informed choices enhances their development as human beings and increases intrinsic motivation. Thus, EPL stresses the importance of having consultees be active decision-makers. EPL is guided by theory and linked to what is known from the literature on SBC and PL. As such, promoting autonomy of consultees is entirely consistent with many SBC theorists’ approaches to overcoming resistance to change (e.g., Caplan, 1970; Meyers, 1989; Margolis & McGettigan, 1988; Truscott et al., 2000; Rosenfield, 1987; Sandoval, Lambert, & Davis, 1977) and Erchul and Raven’s (1997) explanation of informational social power in consultation.

Consultee equity. Equity is an EPL concept from the consultation literature (e.g., Caplan, 1970; Parsons & Meyers, 1984) that is inherent in SDT. We actively promote nonhierarchical relationships by working to reduce perceptions of the consultants as experts, recognizing consultee knowledge and competence, and promoting consultee choice whenever possible. Equity is critical to autonomy, because participants cannot make meaningful choices if the relationship between the consultant and consultees is hierarchical. This does not mean that consultants have no knowledge or expertise to bring to the table, but it does mean that consultees have equally important knowledge and expertise to contribute.

Diverse motivations and conceptualizations. Although SDT provides mechanisms for intrinsic motivation, one of the complexities of dealing with change through SBC and PL is that participants may have diverse motivational characteristics. People construct their own interpreta-
tions of the world and these constructions are fundamental to positive psychology (e.g., Buss, 2000; Fredrickson, 2001; Lyubomirsky, 2001). People become happy, motivated, content, interested, and confident based on their subjective interpretations of their situations and, furthermore, they are generally prone to continue interpreting their situations in the same way (e.g., Lyubomirsky, 2001).

Diverse motivations and conceptualizations sometimes create situations in which consultees do not follow exactly what the EPL consultant thinks that they should do. In such cases, EPL consultants need to consider the strategic goals of the effort, the primacy of the consultees’ contextual knowledge, and the assumption of a positive consultee trajectory before assuming that the consultees are wrong and an expert prescription is warranted. If an expert prescription or intervention is deemed necessary, then great care must be taken about how exactly it is implemented. Deci (1975) posited that external events, such as consultant demands for specific behaviors from consultees, can be easily perceived as controlling. In such cases, short-term compliance from the teacher may occur, but consultee self-motivation, investment, and commitment are diminished, and long-term implementation of the planned intervention is unlikely. Such an outcome, although seemingly productive in the short term, is clearly counterproductive in SBC. In contrast, external events that are perceived as informational provide relevant, specific feedback in a supportive way that consultee can then use to determine the best course of action. Informational events can produce intrinsic motivation.

Constructivist and Socioconstructivist Learning Theory

Positive psychology and SDT provide the theoretical supports for the motivational aspects of EPL. The theoretical foundation for participant learning is equally important because it impacts both the acquisition and the sharing of knowledge (Tillema & Orland-Barak, 2006). Similar to Posner et al. (1982), in EPL we view participant learning as a constructivist process focused on learning that occurs in Piaget’s (1952) and Vygotsky’s (1978) processes of assimilation and accommodation. EPL relies on the role of social discourse and contexts as ways to develop and transmit collective knowledge within a group. Broadly defined, constructivism is a collection of learning theories that postulate that individuals make meaning from experience through the process of integrating new experiences with prior knowledge (Merriam, Caffarella, & Baumgartner, 2007), through active rather than passive processes (Beilin, 1989; Daley, 2000). Consequently, new learning is dependent on previous learning, and the failure of previous learning to explain new experiences (Glassman, 1994; Keiny, 1994; Tudge & Winterhoff, 1993).

Changing knowledge schemes. Piaget believed that knowledge is organized in structures called schemes (Beilin, 1989; von Glasersfeld, 1989), which serve as filters to understand later interactions with the environment. Therefore, an individual’s understanding of current information clearly depends on his or her prior learning or schemes (Keiny, 1994; schemes are also sometimes called schema or schemata). Misperceptions originate within these existing schemes in the Posner et al. (1982) view of conceptual change. Of note, encountering new information brings about one of three possible reactions (Glassman, 1994; Tudge & Winterhoff, 1993). If the new information is too far beyond the realm of past experience, then it is discounted and ignored. The existing schemes are unchanged (i.e., the perceptions are reinforced). If it can be comfortably linked to existing knowledge, it is assimilated into existing schemes (i.e., the perceptions are expanded, but remain essentially the same). When new information is conceivable to the individual but does not fit existing schemes, cognitive dissonance, or tension, occurs within the individual. The individual then seeks to reduce this tension by either changing existing schemes or constructing a new scheme. This process of creating a new scheme to resolve the tension between old information and new information is called accommodation (Beilin, 1989; Daley, 2000; Merriam et al., 2007) and often occurs in social dialogue and contexts (e.g., Tillema & Orland-Barak, 2006). This process is essential to Posner et al.’s (1982) conceptual change theory, because they posited that conceptual change occurs only through accommodation and that misperceptions are often supported by social contexts that interfere with accommodation. Accommodation is also central to EPL, because constructivist and socioconstructivist learning theories assert that social contexts can provide positive support for new, more productive and accurate conceptualizations (i.e., schemes).
Guiding consultee learning. Vygotsky (1978) viewed the area between what is known and what can be known as especially important for learning. This area between the limit of existing knowledge and the limit of possible knowledge acquisition is termed the zone of proximal development (ZPD; Cole, 1985; Glassman, 1995; Tudge & Winterhoff, 1993; Vygotsky, 1978). In socioconstructivist theory, the ZPD is where accommodation occurs. It is the state in which incoming information is too different from existing schemes to be assimilated, but not so different from existing schemes as to be incomprehensible.

Socioconstructivists use the term scaffolded instruction (Wood, Bruner, & Ross, 1976) to explain the deliberate transmission of knowledge. Scaffolding is the process through which a “more knowledgeable other” (MKO) temporarily supports a learner in the ZPD for a new task (Winn, 1994). As the learner’s existing knowledge fails, the MKO provides alternative schemes that can be incorporated, resulting in the learner’s creation of a new scheme. This scaffolding process is central to EPL.

Consultants function as MKOs by supporting consultees as they learn new information and practices that differ from those they usually employ. However, we do not limit the MKO role to consultants. Because we work to enhance competence and autonomy among participants, we think it is more effective to use consultees as MKOs whenever possible, particularly as they progress in the process. Teachers are encouraged to present cases, lessons, and demonstrations of the targeted skills to their colleagues as they progress. Using teachers to present information is consistent with the use of referent social power (Erchul & Raven, 1997) as a means of social influence. That is, other participants may be more likely to believe information presented by a colleague. Teacher presentations have the added feature of being congruent with the social psychology phenomenon of social commitment (Cialdini, 2001); it is much harder for the consultee to return to a previous belief if he or she has made a public commitment to a new belief or behavior by training others.

Situating the learning. Situated cognition (Brown, Collins, & Duguid, 1989; Greeno, 1998) is a related, critical component of EPL. Brown et al. (1989) defined situated cognition as the practice of acquiring new knowledge and skills in authentic settings that reflect the real world. Situated cognition allows EPL participants to understand the conditions for applying newly acquired knowledge and to recognize the real-world implications of the new knowledge because the consultation or PL is centered in their classrooms, with their students, using authentic materials. In other words, EPL is responsive to the real situations and needs of participants.

Situating the learning is straightforward in EPL consultation because consultation cases are inherently from the teachers’ classrooms. However, it is more difficult in PL settings. PL trainers often use analogue cases because they are easier to control and present to participants, but we believe this method is less effective. In EPL projects, we have participants select case studies from their classrooms consisting of a student or group of students whose learning or behavior is of concern. The case study then becomes the focus of each participant’s PL. Having participants use real situations and cases offers authenticity and creates powerful learning opportunities. In EPL, real-world applications occur within social communities of practice (learning communities) that include consultants, participants, and other members of the school community and are deliberately constructed to enhance socioconstructivist learning (Truscott & Truscott, 2004).

Situated cognition and socioconstructivist learning provide an understanding for why EPL activities can enhance consultee learning. Constructing knowledge through dialogue about authentic issues puts participant’s beliefs in the shared context of others. Exposure to other perspectives increases the likelihood that the participant will reexamine existing beliefs (Collins, 1988; Truscott & Truscott, 2004). This social discourse allows the consultant to influence the nature of the shared conclusions that are created, while allowing participants to exercise autonomy and choice about the learning.

However, socioconstructivist learning includes the possibility that the learning generated by participants might produce unintended outcomes (Tillema & Orland-Barak, 2006). Participants might find only certain aspects of the presented information relevant, or they might apply the information in unanticipated ways. This is akin to Posner et al.’s presentation of the development of misperceptions (e.g., Strike & Posner, 1992) and it is potentially problematic in SBC and PL.
Theoretically, in EPL the ability for the consultant to guide the social discourse and provision of social structures that support new learning provides a preventive measure against the devolution of learning, but, in practice, doing so takes considerable skill and ongoing assessment of consultee learning.

**Distributed Practice**

Distributed practice is a learning component of EPL (Truscott & Truscott, 2004) from classic learning theory research. It is tangentially related to situated cognition and socioconstructivist learning because these methods inherently take more time than didactic presentations of material, yet distributed practice is a key element of EPL in and of itself. Distributed practice occurs when learning is divided across multiple sessions (Cepeda, Pashler, Vul, Wixted, & Rohrer, 2006; Donovan & Radosevich, 1999). As early as 1885, Ebbinghaus (1885/1964) demonstrated that distributing practice over time results in increased learning of simple motor tasks. More recently, distributed practice has been demonstrated to result in improved learning and retention of more complex information over longer periods of time (Donovan & Radosevich, 1999). Desimone (2009) recently identified this as an issue of PL “duration.” EPL consultants deliberately pace consultation and PL sessions over time and schedule support visits between sessions to distribute learning over time and across sessions.

**EPL Enacted Components and Implementation**

Table 1 identifies key EPL implementation components and links them to methods we use to enact the components. In EPL, the consultant uses constructivist pedagogical practices to purposefully elicit participant cognitive dissonance and to provide opportunities to create new schemes (Merriam et al., 2007). Information, most often consultee-generated, that challenges participants’ thinking is presented using activities, examples, data, and, ultimately, scaffolded (supported) new behaviors in the classroom. These activities are designed to lead participants to rethink their previous ideas (Green & Gredler, 2002). The EPL consultant functions as an MKO who supports participants in the process of accommodation (Glassman, 1994; Tudge & Winterhoff, 1993; Vygotsky, 1978).

Deliberately enacted components of EPL, such as developing learning communities, ongoing formative assessment, support visits, and responsive follow-up visits, support participants while they are engaged in the state of cognitive dissonance and new learning is emerging. Such supportive and responsive actions are important because, as noted by Strike and Posner (1992), misperceptions are difficult to change and participants will often regress to previously existing cognitive schemes if new learning is not actively supported. In SBC and PL situations, this “slipping” process is often reported as teachers briefly implement a new intervention or technique, but revert to past practices after a day or two. Conceptually, the EPL support process does not differ from teaching science or mathematics to children. The consultant or PL project leader must support the consultee as new learning emerges. Teaching participants the scientific process of problem-solving assessment of the individual, contextual, and instructional factors that underlie student learning and behavior is critical to eliciting dissonant cognitive states. The problem-solving assessment often provides dissonant information about the targeted student and sources of problems. Because the data are collected and analyzed by participants themselves, the results cannot be easily dismissed. Dissonance results because either participants must expand their initial conceptualization of the problem or they must reject the data, which may challenge their self-perception as open-minded, effective educators.

**EPL Implementation**

EPL implementation varies somewhat, depending on the specific circumstances and desired outcomes of a given context. However, across diverse contexts there are essential implementation elements. Table 2 presents an overview the responsibilities of consultants and consultees in EPL projects.

**Consultation or PL?** We have implemented EPL in both SBC and PL projects. The model, premises, and most consultant actions are the same in both situations, but the process begins
differently. In SBC, a “problem” student (or students) is already identified and that case serves as
the vehicle for learning new consultee skills applicable to the situation. Although the specifics of
each case may be unique, we work to form learning groups with other consultees who have similar
concerns about children in their classrooms. This is usually not as difficult as it might seem, because
the range of common student problems in a school is limited. Once learning groups are formed, the
process is much like PL.

In PL projects, a topic is identified (e.g., coteaching mathematics, conducting functional behavior
assessments, improving literacy instruction) that is usually a grade-level or school-wide concern.
Educators are asked to participate in a PL experience about the topic and learning groups are formed.
After the groups are formed, participants identify a student who is of concern to them to serve as
the case for the project. In other words, the primary distinction between EPL in SBC and PL is that
in SBC we start with a student concern, and then form learning groups about a topic; in PL projects,
we start with a topic, form learning groups, and then select a student to serve as the case.

Once topics are identified and groups are formed, the problem-solving sequence, EPL approach,
and activities are usually very similar in both SBC and PL situations. As EPL consultants, we do not
make distinctions between consultees in SBC and participants in PL projects. In both situations,
there are skills that must be acquired (e.g., assessment, intervention, progress monitoring), compet-
encies that must be identified, nurtured, and demonstrated, and change that must be supported (via
follow-up and support visits).

**Problem solving in EPL.** EPL problem solving occurs at two levels. First, EPL consultants
adopt an iterative problem-solving approach to the implementation of any project. The consultant

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**Table 1**

*Exceptional Professional Learning Components as Enacted*

<table>
<thead>
<tr>
<th>Exceptional professional learning component</th>
<th>How enacted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relatedness: Feelings of connectedness with and social interactions between members of a group</td>
<td>Opportunities for discussion, Establishing teams/learning communities, On-site support visits, Problem-solving activities, Group work</td>
</tr>
<tr>
<td>Authenticity: Genuine and authentic applications of practical content in the setting</td>
<td>Assessment of current practice/current status, Consider contextual factors, Skill practice, Case studies</td>
</tr>
<tr>
<td>Autonomy: Consultee-directed learning through opportunities to make meaningful choices and influence the learning experience</td>
<td>Active engagement in setting goals, Assistance with recruitment and voluntary participation, Build autonomy through successful practice, Active decision making and problem solving</td>
</tr>
<tr>
<td>Responsiveness: Sustained efforts to assess, attend to, and meet consultee needs</td>
<td>Needs and formative assessments guide process, Many opportunities for clarification and questions, Easy access to facilitators, Flexible, evolving agenda, Link consultee knowledge with appropriate experiences</td>
</tr>
<tr>
<td>Equity: Valuing all participants as having equal importance and equal power</td>
<td>Important in ALL aspects of training, Making “experts” of all participants, Featuring consultee accomplishments and contributions, Train the trainer</td>
</tr>
</tbody>
</table>
engages the consultees to identify the problems of the context and participants by collecting data about current practices, contextual resources and limitations, and consultee factors (e.g., knowledge, skill, confidence, conceptualizations). Once problems are identified, the consultant collects data to clarify and define the issues from documents, needs assessments, discussions, and consultee feedback. These data are analyzed with consultees, the focus for the EPL project is selected (i.e., goals), and the content of the EPL project is determined and applied. To monitor progress toward the goals, formative assessment data are collected throughout the project (including consultee feedback about sessions and content), and consultee learning is assessed using the case studies and support visits. These data are aggregated, then shared and evaluated with consultees and used to inform subsequent EPL activities. Summative evaluation data are collected on the EPL project through written feedback, meetings with consultees, and examination of project case studies. Throughout, problem-solving data about the project are shared with consultees, and subsequent activities are altered as needed to demonstrate the problem-solving processes and to involve consultees in project development and planning.

Second, problem-solving methods also form the core approach of EPL projects. Consultees engage in the problem-solving sequence through their case studies. After identifying a student or group of students of concern, consultees learn to collect data to define the problem (e.g., using curriculum-based assessment, behavioral observations). They learn how to analyze these data to identify a specific problem and to develop alternative, evidence-based ways to address the problem (i.e., interventions). After selecting and learning more about an intervention approach to address the problem, consultees learn how to implement progress monitoring to determine whether the plan is

Table 2
Consultant and Consultee Roles in the Exceptional Professional Learning Model

<table>
<thead>
<tr>
<th>Timing</th>
<th>Consultants’ role</th>
<th>Consultees’ role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before sessions</td>
<td>Initiate relationships with consultees</td>
<td>Participate in the needs assessment</td>
</tr>
<tr>
<td></td>
<td>Conduct needs assessment</td>
<td>Participate in member checking</td>
</tr>
<tr>
<td></td>
<td>Member-check results of assessments</td>
<td>Identify other potential participants</td>
</tr>
<tr>
<td></td>
<td>Establish authentic learning groups of educators</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plan session using needs and formative assessments,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>member checks, and evidence-based content</td>
<td></td>
</tr>
<tr>
<td>During sessions</td>
<td>Nurture relationships with consultees</td>
<td>Participate in sessions.</td>
</tr>
<tr>
<td></td>
<td>Facilitate formation of authentic groups of educators</td>
<td>Choose partner/group and identify a student or topic</td>
</tr>
<tr>
<td></td>
<td>who identify a shared student or topic for case study</td>
<td>for a case study</td>
</tr>
<tr>
<td></td>
<td>Present evidence-based content needed for case study</td>
<td>Learn material, contribute</td>
</tr>
<tr>
<td></td>
<td>Assess content of the session and method for</td>
<td>authentic expertise, practice</td>
</tr>
<tr>
<td></td>
<td>presenting the content with participants. Respond to</td>
<td>skills, and evaluate presented</td>
</tr>
<tr>
<td></td>
<td>Complete housekeeping activities (e.g., scheduling</td>
<td>methods for congruence and utility in the classroom</td>
</tr>
<tr>
<td></td>
<td>support visits)</td>
<td></td>
</tr>
<tr>
<td>Between sessions</td>
<td>Evaluate feedback and plan support visits</td>
<td>Collaborate with partner/team to implement EPL content</td>
</tr>
<tr>
<td></td>
<td>Schedule support visits</td>
<td>Apply learning to case, evaluate</td>
</tr>
<tr>
<td></td>
<td>Nurture relationships with consultees</td>
<td>results</td>
</tr>
<tr>
<td></td>
<td>Conduct support visit, identify strengths, address</td>
<td>Provide feedback on outcomes of applying skills</td>
</tr>
<tr>
<td></td>
<td>mislearning, and member check</td>
<td>Identify needed clarification</td>
</tr>
<tr>
<td></td>
<td>Plan subsequent session based on consultee feedback</td>
<td>Participate in support visit</td>
</tr>
<tr>
<td></td>
<td>and information from support visits. Showcase</td>
<td></td>
</tr>
</tbody>
</table>

Note. EPL = exceptional professional learning.
working (e.g., using curriculum-based measurement). They use the results of the progress monitoring to alter the plan as needed. At the completion of the case study, they evaluate the results of their efforts.

It is important to note that, whenever possible and throughout the EPL process, consultees choose interventions and assessments from a variety of approaches. EPL consultants honor the concept of “equifinality,” which recognizes that there are multiple, equally valid ways to accomplish most tasks. In EPL, the preferable evidence-based approach is the one that is supported by consultees. EPL consultees see the problem-solving process demonstrated by the consultants and learn to problem solve through their case studies.

**EPL in Practice**

**Entry.** In practice, the strategic SBC process begins with deliberate efforts to build relationships with consultees. EPL consultants are often members of the school community (e.g., school psychologists) and purposefully participate in activities with teachers such as eating lunch in the faculty lounge, attending athletic and other extracurricular events, and monitoring school bus arrivals. Such activities are critical to school culture and consultants who share in them have the advantage of already developed relationships with potential consultees and deeper knowledge of the school social context. The potential power of such actions was evident in one EPL consultation project with a group of kindergarten teachers. The internal consultant, Brad Daly, made the first real inroads after helping a key teacher clean her classroom fish tank (Truscott, Daly, et al., 2005). That may sound like mundane work that is beneath the role of a consultant, but after that point he was accepted as a trusted member of the group. We now call such deliberate consultation entry and relationship building activities “cleaning the fish tank” and such activities are explicit parts of EPL consultation.

As university representatives conducting PL, we are most often external consultants to the school community. Entering the social context as an external consultant requires different strategies. We start by meeting with the relevant groups, encouraging the use of first names in communications (e.g., rather than Dr.), frequently checking perceptions with members of the community, deliberately acknowledging participant expertise, and attempting to diminish our perceived role as experts. We conduct formal and informal needs assessments, and then critically check the results with participants (i.e., conducting “member checks” as in qualitative research). Our goals in these activities are to build relationships, to enhance consultee competence as “experts” on the salient issues, and to collect data to be used in planning, roughly in that order of importance. Such techniques are supported in the SBC literature. Erchul and Martens (2010), Martin (1978), Meyers (1989), and Rosenfield and Gravois (1996), for example, have all discussed the importance of system entry and the relative merits of expert and referent social power. Organizational consultants (e.g., Schmuck, 1995) use needs assessments.

**Selecting and beginning EPL projects.** The deliberate process of building consultee knowledge, confidence, and competence begins at system entry and continues as sessions start. The initial needs assessment often indicates that consultees want instruction about how to use existing data (such as state-mandated test results) and how to collect easy-to-use additional data about students of concern to them. They may or may not see the link between such data and altering instruction in the beginning, but most often they want to know how to understand and use data better. When possible, we take advantage of naturally occurring groups of teachers at this point. Often, a special educator and a general educator comprise a team or we construct teams of teachers with students exhibiting similar issues (e.g., behavioral, academic). Coupled with some initial instruction about how to collect data, the EPL consultant has consultees collect some limited data from their classrooms. Within a week, the EPL consultant checks with consultees to assess their understanding of the task, support the data collection, and reinforce the effort.

**Identifying consultee competencies.** The consultant identifies areas of consultee competence, specifically identifies the competencies, and looks for opportunities for the consultees to teach a skill, present their cases, or in some other way demonstrate their competence. Such activities proceed through data collection, interpretation, and intervention planning. In PL projects, the same
basic strategies are employed. For example, in one project an urban school district wanted to improve its use of FBAs and Behavior Intervention Plans (BIP). Over time, the EPL project leaders had teams of school psychologists and behavior support personnel collect and examine “data” in the form of recommended FBA procedures, the existing in-house practices, and those of other districts to identify strengths and limitations of each. The teams then worked toward a consensus of what practices to try, implemented the practices with a case student, and demonstrated the most promising practices to the group using cases. Eventually, they created FBA and BIP manuals and training modules for the district.

Building consultee knowledge. In EPL, knowledge is built through presentations, demonstrations, and identification of salient information. Choice and autonomy are offered by having participants select such things as cases, locations for meetings, activities, topics for additional learning, potential interventions, and methods of presentation. Confidence is built through practice, supportive feedback, and group acknowledgment of effort. Competence is built by recognizing accomplishments and showcasing consultee skill development.

Assessing and responding. Throughout, we attend carefully to the motivational and learning theories that undergird our practice. In PL projects, we employ an EPL fidelity checklist that lists the key EPL components with brief descriptions. The checklist is used strategically as we plan each session to focus consultants on including each of the key elements as much as possible in each activity. Not every activity includes all components, but we examine each component for each activity to determine whether we can include equity, autonomy, authenticity, relatedness, and responsiveness. In this way we use theory to deliberately, carefully, and strategically guide EPL practice. We use a similar form, completed by project leaders and participants, as a formative evaluation instrument after each session to assess whether participants perceived the activities as intended. Participant feedback is reported in subsequent sessions with explanations about how the EPL was altered in response.

EPL consultants also attend explicitly to consultee learning and motivation. Consequently, as in all good pedagogy, ongoing assessment of consultee progress is a critical element of the process. Support visits provide the best opportunity to assess consultee learning and progress. Support visits are conducted individually or in small groups, focus on implementation of project content, and include demonstrations of skills (often by a teacher colleague). EPL consultants ask participants what support is needed, examine products and practices for evidence of learning or mislearning, and provide corrective, supportive feedback or recognition of competence as warranted. In addition, EPL consultants consistently monitor performance to identify and correct misconceptions, and underscore gains in knowledge, skill, competence, and confidence.

The focus and content of participant support evolves over time. Initially, EPL consultants provide scaffolded instruction that includes considerable direct content instruction and supportive feedback. This level of support may also be provided later in a project when new skills are introduced. For example, it is often necessary to teach participants how to conduct progress-monitoring assessment of students. In these cases, we may use step-by-step examples and simulated data. As soon as possible, however, the consultees begin collecting and using their own case data and the consultant supports their efforts to implement the content with their students. Next, participants complete combinations of multiple steps in the process. A case study, which employs all steps in the process, is the culminating activity in the first part of an EPL project. In all cases, we look for opportunities for participants to demonstrate, lead activities, and otherwise act as the “experts.”

In the second part of a complete EPL project, participants design and deliver the content to their colleagues who did not participate in the EPL project. EPL consultants support the presenting participants’ efforts to present the material. That is, the consultants support the act of teaching others in addition to the subject matter of the project. In these cases, we use EPL as the model we teach to participants.

Limits of EPL. EPL is neither appropriate nor recommended for every situation. The process takes considerable time and effort. Not every school has the resources to implement EPL, and the model is not necessarily acceptable in some settings that adopt more prescriptive approaches to teacher professional development. Not all consultees will respond to the method. In some SBC
situations, such as in a crisis, it may be preferable to implement an expert consultation model to respond immediately to the consultee’s and/or student’s needs, at least initially. Similarly, if the presenting student problem is unusual, then the consultant may not be able to form the learning communities that are critical to EPL practice. The motivational and socioconstructivist underlying theories may not match the consultant’s personal beliefs about how best to approach problems. In such cases, other SBC models may well be preferable.

**Evidence of Change Expected With EPL**

Several evidence-based elements are featured in EPL. They include a focus on practical components and active engagement with authentic materials, content and applicable pedagogy that is evidence-based, the establishment of naturally occurring learning groups that engage in collaborative problem solving as the primary activity, support visits to assist and monitor learning, and prolonged and distributed learning (Consortium for Policy Research in Education, 1996; Desimone, 2009; Easton, 2008; Truscott & Truscott, 2004). The limited exploratory research on EPL illustrates that the framework has the potential to improve student outcomes over the course of a typical school year.

Elements of EPL have been presented in print (Truscott et al., 2000; Truscott & Truscott, 2004) and several conference papers (e.g., Albritton, Truscott, Schwartz, Psimas, & Brooke, 2011; Graybill, Kreskey, Boney, Truscott, & Freer, 2008; Psimas et al., 2009; Truscott, Daly, et al., 2005), but it has not been published previously as a whole. After preliminary work using elements of the framework with prereferral intervention teams (Truscott et al., 2000), Truscott and Truscott (2004) developed the first articulation of the framework. It was implemented in a small Connecticut school district to enhance language arts instruction. In postproject interviews, teachers and administrators reported increased pedagogical knowledge and understanding of their students. They reported improved instruction and student outcomes, and were positive about the process. Unpublished exploratory projects using the EPL framework have also yielded some early support. Truscott, Daly, et al. (2005) reported results with four kindergarten teachers in upstate New York who previously resisted using Dynamic Indicators of Early Basic Literacy Skills (DIBELS) data results to guide instruction (Good & Kaminski, 1996). In postproject interviews, participating teachers rated the EPL methods highly and reported that they learned to use the DIBELS data. The consultant also identified clear evidence that the teachers used ongoing DIBELS data collection to inform their instruction. In contrast to the fall semester when teachers did not use the data, student outcomes were good, as measured by progress on the DIBELS. Of the 28 students who were identified with deficits in January, only one remained in that category at the end of the school year. In fact, the at-risk children who were the focus of the project gained more than the at-grade level group.

We continue to develop the framework through implementations with several school districts in metropolitan Atlanta. These projects have focused on teaching educators to use FBAs to develop and implement BIPs with students who exhibited challenging behaviors and on elementary grade mathematics instruction by special and general educator coteaching teams. Once again, results were limited but promising. We have good qualitative data about improvements in knowledge, usage, and sustainability among educators, but our student empirical data is thin.

Overall, and summarized across several projects, pre- and postproject interview data have suggested that participants recognize the components of relatedness, equity, authenticity, and responsiveness as salient features of EPL that distinguishes it from prior experiences. The interactive nature of trainings and participation as part of a school team are frequently cited as strengths. EPL participants have consistently reported that EPL consultants’ openness to differing opinions, accessibility to participants, and personable dispositions all contribute to the establishment of an equitable environment. Consultees also identified EPL consultants’ responsiveness as differing from previous experiences with PL and SBC. Participants have reported that using formative assessment data to alter subsequent EPL activities contributes to feeling that learning is individualized to participant needs and enhances knowledge gains. In particular, EPL participants cited the hands-on, applied activities and case study as strengths of the experience. This emphasis on authenticity reportedly contributes to participants’ increased competencies and changes in attitude about the content in general by reducing anxiety and/or increasing confidence.
Quantitative data on consultee learning outcomes as measured by adapted instruments reveals increased knowledge. For example, in one project, pre- and postproject scores on an FBA knowledge test were statistically significant, $t(19) = -5.33, p < .001$, one-tailed with a large effect size ($d = 1.225$). Similar scores were evident on a test of problem solving in coteaching mathematics. We also saw increases as measured by evaluation of pre- and postproject ratings of the case study products. For example, in one FBA project, improvements in performance on FBAs and BIPs between pre- and postproject products were statistically significant, $t(9) = -1.89, p = .046$, one-tailed, with a large effect size ($d = .78$).

We have not measured motivation with any formal scale. However, in follow-up interviews and reports, it has not been unusual for consultees to report that they continue to use information from EPL projects, redelivered the content to colleagues, and/or worked to alter district policy to include the content. This has occurred in some instances with little administrative support (e.g., FBA policy in two districts). We have seen consultees’ interest in propagating the content as good, albeit indirect, evidence that they are motivated to implement it.

However, the recent EPL projects have been limited in scale and scope. Given the EPL theoretical framework and our past experience with EPL projects, we believe EPL has potential to affect malleable educator factors that influence the effectiveness of instruction. Specifically, our initial research has suggested that EPL supports change in identifiable ways and (a) is well-received by teachers, (b) results in changes in instructional or behavioral intervention procedures using evidence-based methods (assessment, intervention, progress monitoring), (c) increases participants’ understanding of the targeted content, (d) increases participants’ feelings of competence to teach students who experience difficulty, and (e) improves achievement or behavior for the targeted students.

Problems of Implementation and Sustainability

Despite initial research support, EPL projects have not been without problems. In two cases, after FBA and BIP projects were completed, participants were ready to “roll out” new district-wide policies and programs. Subsequently, district priorities shifted based on new No Child Left Behind Adequate Yearly Progress reports and other factors. Administrative attention and support for the FBA projects dwindled. Participants, who included general educators, special educators, school psychologists, and behavior specialists, tried to implement the procedures on their own, but were disappointed that their efforts and products were not supported. Their frustration is understandable and a potential problem for intensive consultation efforts like EPL.

No intervention is entirely benign, including EPL. The process is designed to result in participant investment, autonomy, and motivation. An unintended potential consequence of the process is that motivated participants who are subsequently frustrated in their efforts to implement new knowledge and behavior may be unwilling to commit to future endeavors. Consultants should consider such potentially negative outcomes from projects that promote professional autonomy in organizations that do not actually support it. As noted by Erchul and Martens (2010), for SBC to succeed, either schools must become less bureaucratic or consultation has to become more bureaucratic. EPL is a decidedly nonbureaucratic approach that may not be applicable in highly bureaucratic systems.

A different EPL project offered a potentially related problem. Even though we had described EPL theory and process in detail during multiple system entry meetings, two midlevel teacher—leaders appeared not to be satisfied with the participant autonomy that was elicited though EPL. At a meeting near the midpoint of the year-long project, they wanted the EPL project leaders to tell participants what to do, train them to do it, and supervise the implementation of the targeted teaching strategies. After that meeting, the teacher—leaders began to undermine the EPL project and both withdrew completely by the end of it. Teacher participants were very satisfied with the project, demonstrated increased skill in problem solving, and implemented evidence-based practices in their cases. However, the explicit notion that participants should be encouraged to make meaningful decisions about their learning and how to implement it is different from most teacher professional develop-
ment projects; this premise may become unacceptable to some administrators and teacher-leaders as it becomes clear that EPL consultants do not generally direct participants to do particular things.

**Conclusion**

EPL provides us with a model that guides our SBC and PL practices and forces us to think explicitly about consultee learning, change, and motivation to sustain new practices. It is adaptable to many different content topics, and participants have rated EPL projects as effective and enjoyable. Process and organizational consultants who serve settings other than schools may recognize some EPL elements, such as building teams of consultees, examining current practices, soliciting consultee ideas, and demonstrating consultee competencies. In some ways the EPL process parallels total quality management and shared decision-making methods used by consultants serving hospitals and businesses. The explicit attention to underlying theories of motivation and learning that is unique to EPL could inform similar efforts in multiple settings.

SBC is a complex process. Much has been written about consultation techniques and outcomes, but little theory or research is available about the consultee learning and motivational mechanisms that must undergird internalized and sustained changes in consultee knowledge, motivation, and behavior. Regardless of the theoretical orientation, we believe that it is important to develop this area of consultation research, and to consider the potential impact of any consultation approach or action on consultee learning and motivation.

**References**


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