Exploring Co-planning Conversations as a Professional Development Activity for Mentors and Mentees at the Beginning of a Yearlong Teacher Residency

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EXPLORING CO-PLANNING CONVERSATIONS AS A PROFESSIONAL DEVELOPMENT ACTIVITY FOR MENTORS AND MENTEES AT THE BEGINNING OF A YEARLONG TEACHER RESIDENCY

A Dissertation

Submitted to the Graduate Faculty of the Louisiana State University and Agriculture and Mechanical College in partial fulfillment of the requirements for the degree of Doctor of Philosophy in

The School of Education

by

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ABSTRACT

In order to prepare pre-service teachers for their roles in the classroom, it is important to examine the rigor and purpose of the mentoring experience. This study explored the aspects of co-planning conversations that helped experienced and novice teachers expand their expertise and develop a mutually beneficial mentoring relationship at the beginning of a yearlong teacher residency model. While research on co-planning during the student teaching/residency experience exists, this research illuminated the importance of mentoring conversations early on in the teacher residency experience. Using a single case study design, observations, one-on-one interviews, and artifacts from four mentor-mentee dyads, data were examined to gain the essence of a mentoring relationship that utilized co-planning at the beginning of a yearlong teacher residency. Results from this study indicated that co-planning conversations yielded professional development opportunities for both mentors and mentees. Three major themes emerged from data analysis: candid collaboration, dispositional capacities, and ongoing work. These findings further suggest that co-planning can disrupt the norms of the traditional mentor-mentee apprenticeship model. This study can be used to inform teacher preparation programs and school districts about the supports necessary for novice and experienced teachers who participate in yearlong teacher residency programs.
CHAPTER ONE. INTRODUCTION

The first chapter provides an overview of the purpose of the study and presents co-planning conversations at the beginning of a yearlong residency as a critical issue. Important terms are defined, and research questions are presented.

Recent financial, scholarly, and programmatic efforts have caused the fulcrum of teacher preparation to shift from the sole responsibility of the university professor to a shared responsibility with mentor teachers and pre-service teachers playing an active role in the process (Gatti, 2019; Goodwin et al., 2016; He, 2009). The residency model, while currently not the norm of traditional teacher preparation, provides an opportunity for pre-service teachers and their mentors to share pedagogical practice in an environment where the resident can develop competency, enhance knowledge, and develop skills. In many instances, teacher candidates and their mentors are often provided with conflicting information about the roles and responsibilities of teacher preparation, which compound to undermine the efficacy of mentorship (Hall et al., 2008; Solomon, 2009; Tillema et al., 2011). The adoption of a model similar to medical residencies has the potential to elicit major changes for teacher preparation since residency programs have shown to be more rigorous than traditional preparation models (Mourlam et al., 2019).

Mentoring during the capstone experience is an inherent component of traditional teacher preparation programs; however, the rigor and purpose of this experience varies based on the interpretation of mentorship by the school site mentor (Darling-Hammond, 2006; Feiman-Nemser, 2001a; Feiman-Nemser, 2001b). Braaten (2019) discussed the juxtaposition of teacher education coursework and field experiences as the “two-worlds pitfall” since pre-service teachers are learning to teach within and across settings with conflicting norms, practices, expectations,
and tools (p. 62). Likewise, Roegman and Kolman (2020) attest that mentors are also met with historical norms, policies, and school, district, and societal beliefs that influence their role as a mentor. Since beginning teachers are at an impressionable stage in their careers, there is a great need to investigate the methods or strategies used to effectively prepare mentor teachers and pre-service teachers for a meaningful course of study during their internship experiences (Russell & Russell, 2011). Commonly cited mentoring practices focus more on the short-term rather than long-term view of learning with attention paid to procedural and technical details.

In order to reduce teacher attrition rates, it is important to examine the impacts of effective mentoring and how it influences the early stages of teacher development (Russell & Russell, 2011). Feiman-Nemser (2001) cited teacher learning as the desired outcome of teacher education, which means the ways by which pre-service teachers learn should not be left to chance or stifled by lack of communication between preparation partners. Communication impacts the type of relationships developed by mentor teachers and pre-service teachers. While communicative agreement between mentors and mentees makes for a comfortable relationship, it does not encapsulate difficult teaching and learning experiences. When productive disagreements occur within a mentoring relationship, mentors and mentees are able to explore unknown ideas and cross barriers of understanding (Tillema et al., 2011).

For mentors and mentees to function in equilibrium, it is important that the knowledge, skills and experience of each co-teacher, regardless of certification status, is valued in the decision-making process (Strieker et al., 2020). This process of learning to teach through both co-planning and co-teaching, while avoiding hegemonic relationships, allows novice teachers to practice collaborative conversations that will transfer to their time as in-service teachers. Tobin et al. (2001) coined the term, praxeology, to describe how teachers talk about praxis as it applies
to their context. Praxeology, or the articulation and communication required for co-planning discussions, is cited as a barrier impacting instructional capacity when co-teachers fail to communicate or prioritize other tasks (Gallo-Fox & Scantlebury, 2015). This leads to the notion that mentors are unprepared to prioritize communication as part of their mentoring work. Design-based research efforts to develop and implement effective mentoring programs can strengthen collaboration between teacher preparation providers and area schools, as well as improve the effectiveness and longevity that mentoring has on a beginning teacher (Russell & Russell, 2011).

The Council for the Accreditation of Educator Preparation (CAEP), the accreditation body for teacher preparation in the United States (US), prompts preparation programs to develop more meaningful and purposeful clinical partnerships that are rigorous and outcome-focused for both P-12 and higher education students (Heafner et al., 2014). The CAEP (2019) analyzes the impact of mentorship through program initiatives related to clinical partnership and practice, specifically (standard 2) and program impact (standard 4). For instance, Standard 2.2 (Appendix F) prompts partners to “co-select, prepare, evaluate, support, and retain high-quality clinical educators, both provider- and school-based, who demonstrate a positive impact on candidates’ development and P-12 student learning and development” (CAEP, 2019, p. 1). In tandem, Standard 4.1 expects the provider to use multiple data points to measure how program completers contribute to student growth, which becomes reliant on the measures put in place for standard 2. While these accreditation standards are meant to challenge, guide, shape, and reform teacher preparation, it has also created a reluctance among teachers to work with pre-service teachers and university preparation programs that place an emphasis on co-teaching and co-planning initiatives (Hurd & Waeilbacher, 2017). While reluctance to serve as a mentor remains
a persistent problem for yearlong residency programs, it is also important to note different mentoring paradigms that appear in the literature.

Brondyk and Searby (2013) identified three mentoring paradigms that ultimately influence the role of communication between mentors and mentees: traditional (support, supervise, guide), transitional (instruct, reflect), and transformative (inquire). A traditional mentoring paradigm positions co-teachers within an apprenticeship context where mentors attempt to transfer their skills to their mentees, whereas a transitional mentoring paradigm positions co-teachers as co-learners. The transformative mentoring paradigm is characterized by fluid and changing roles between mentors and mentees as they create new realities within their work. Transitional and transformative communication structures should be established within clinical settings so that mentor teachers are prepared to engage not only with the colleagues at their schools but with their teacher candidates as well. Researchers have investigated communication structures such as Andrews-Larson et al. (2017) who conducted a case study with four large urban school districts to identify practices within 30 schools that led to growth in instructional quality. Results indicated co-planning sessions supported teachers’ professional learning, particularly through conversational moves, which allowed participants to solicit detailed representations of classroom practice, rationales for instructional decisions, and the lineages of how these elements impact student learning. Like Andrews-Larson et al. (2017), a study crafted by Wexler (2019) utilized an interpretive, qualitative design to learn more about the experiences of one mentor/mentee pair who utilized educative co-planning. The resident teacher was part of a large Midwestern university participating in a yearlong residency experience within her mentor’s first grade classroom. Wexler ultimately posited that the mentee learned from her mentor’s transparent talk when they took time to dive deeply into lessons. Thus, co-planning
conversations allowed the mentee to learn more about her mentor’s justification for what was kept, adjusted, or removed from the curriculum. Wexler (2019) described this as learning “the difference between what one thinks it takes to plan for and teach a lesson and what it actually takes to do so” (p. 57). Andrew-Larsons et al. (2017) and Wexler (2019) exhibited the importance of specific, constructive conversations for teachers with varying levels of experience. To ensure constructive conversations are part of the mentoring construct, school districts and teacher preparation programs should negotiate professional development at the beginning of the yearlong residency that provides teachers at all levels the opportunity to contribute to conversations about practice. These co-efforts on behalf of school district partners and university programs to facilitate joint professional development around co-planning as mentorship may disrupt the positive and comfortable relationships that often exist between university-based and school-based faculty (Hall et al., 2008). However, conceptualizing this work has the potential to support the growth and development of all educators within the mentor, mentee, host teacher, and resident teacher or intern arena. While mentoring as professional development appears in the literature, it is important to note that the specifics of the professional development are often not well-defined.

**Purpose of the Study**

Co-planning has emerged as a professional development activity because as reflective practitioners, teachers share ideas, reflect on past experiences, and develop common goals for students (Goodwin et al., 2016; Scantlebury et al., 2008.). Additionally, co-planning and co-teaching establish collaborative relationships and destabilize the power differential between pre-service teachers or interns and mentor teachers (Gallo-Fox & Scantlebury, 2015). Pre-service teachers benefit from co-planning with their mentor teachers because both parties are responsible
for developing instruction to meet pupil needs and candidates gain insight into the mentor’s decision-making processes (Soslau et al., 2019). While there are existing studies that report the impacts of co-planning and co-teaching on mentor and novice learning either during or after the interactions have taken place (Wexler, 2019; Wexler, 2020a; Wexler 2020b; Wexler, 2020c), these studies fail to specifically address how co-teachers initiate this exchange at the beginning of their time working with each other. Collaborative conversations do not occur by happenstance. Some mentor-mentee dyads established by the preparation program that inspired this research are focused and successful, while other relationships struggle to gain traction. These negative relationships often impact the growth of mentors, mentees, and most significantly, P-12 pupils. A significant piece of what is missing from the discussion on co-planning is the conversations and dialogue that occur at the beginning of the yearlong residency experience, prior to actual preparation to teach, that leads to successful co-planning during the experience or positive perceptions following the residency experience. Thus, the purpose of this study was to explore co-planning conversations at the beginning of a yearlong residency to shed light on the aspects of co-planning conversations that help experienced and novice teachers expand their expertise and develop a mutually beneficial mentoring relationship. This study will focus on the experiences of elementary education residents and their mentors as they embark on a yearlong residency as outlined by university and state guidelines. Such research is important to the state of Louisiana since revisions to mentoring requirements are in a constant state of limbo, leaving preparation providers and school districts to decipher through best practices. While research on co-planning during the student teaching/residency experience exists, this current research study illuminated the importance of mentoring conversations early on in the residency experience. Learning more about these experiences from this study can help all stakeholders involved in
novice teacher development understand more about the supports necessary for new teacher development.

**Co-Planning Conversations at the Beginning of Residency**

The initial negotiation phase of a mentoring relationship is a time for mentors and mentees to establish ground rules that will guide their work (Zachary, 2012). Mentoring relationships can be facilitated through partnership agreements with well-defined goals that are evaluated throughout the mentoring process. As part of a learning partnership, it is important for mentors and mentees to share accountability for learning goals since adult learners achieve growth from being active participants in the diagnosis, planning, implementation, and evaluation of their goals (Zachary, 2012). Too often, mentoring becomes overwhelming when both parties view all of the discrepancies that require improvement, and they become fixated on the impossible task of improving everything. While partnership agreements have improved some mentoring relationships within the researcher’s preparation program, some relationships emerge more successful than others. Mentoring dyads who do not spend enough time carefully articulating their partnership agreements may fall under the assumption that mentoring can happen on the fly or is fortuitous (Zachary, 2012). In addition, mentors who identify multiple areas for growth during the mentoring process are not attuned to the learning styles and cognitive frameworks of their mentees. Zachary (2012) and Feiman-Nemser (1998) advocated for mentors to recognize novice teachers as learners and to adjust their approaches in ways that focus on the mentee’s style of learning. By focusing on the mentee’s style of learning rather than their own, facilitation of learning during the pre-service stage of teacher development is more likely to occur. Cogenerative dialogues and partnership agreements provide a framework for mentors and mentees to attune their conversations to what is most beneficial for effective co-planning.
conversations. Since these conversations of negotiation at the very beginning of a yearlong residency are not well documented, it is important to glean from researchers who have investigated co-planning communication strategies that fostered growth.

In a literature review on co-planning and co-teaching, Pratt et al. (2017) described successful co-teaching partnerships as those who strategically and consciously set aside time for planning and reflecting. The authors further recognized that the actual practice of co-planning is far more difficult than conceptual discussions of co-planning since collaborative conversations can stray from the point of discussion. By dedicating time to a co-planning framework, co-teachers are able to examine the long-term goals for students and the day-to-day adjustments that work to meet the defined needs of students through unit planning, biweekly planning, and daily planning (Pratt et al., 2017). When mentors and mentees engage in frequent co-teaching conversations related to lesson planning, instruction, and assessment, there are discussions of who will do what, when, and where in the classroom (Chu, 2019).

To investigate this phenomenon, Chu (2019) conducted a qualitative study of a teacher residency program that adopted a co-planning and co-teaching model. As part of the study, Chu sought to understand how five mentor teachers situated in public school classrooms in the southern US negotiated their identities as teachers and mentors to teacher candidates who were part of a pilot initiative for a yearlong teacher residency program. Chu purported that the collaborative mindset of a mentor is one of the critical components that define co-planning conversations within a yearlong teacher residency. Findings from classroom observations, interviews, and residency artifacts highlighted how mentors viewed their participation with the residency program as a learning experience since the extra time allowed them to experiment with a variety of mentoring and teaching strategies. In essence, having more time relieved pressure in
instances where teachers feared a strategy would not work. As part of stepping into their roles as mentors, all five mentors emphasized the importance of making their tacit knowledge explicit so that resident teachers could gain a deeper understanding of their thinking and subsequent decision-making process for lesson planning, instruction, and assessment. This suggests that co-planning conversations at the beginning and throughout the yearlong residency experience present an opportunity for novice and experienced teachers to have professional conversations about their experiences.

In order to advance their professional conversations, Ricci et al. (2019) found that mentors and mentees need to have commitment, comfort, and skill in collaborative planning. In their mixed methods study, 37 mentors and 35 mentees from secondary math, science, and special education classrooms associated with the Los Angeles Urban Teacher Residency Program at California State University, Los Angeles engaged with the following co-planning behaviors at least three or more times per week: sharing ideas and materials, communicating freely, identifying areas of strength and areas for growth, and having students view them as equal teachers. These co-planning behaviors require a natural give and take relationship where co-teachers are comfortable selecting co-teaching approaches relevant to the needs of their students. Ricci et al. (2019) also identified steps for co-teachers to consider as part of their planning process: establish rapport, identify teaching styles that work, create a cohesive classroom, discuss strengths and weaknesses, discuss special and regular education goals, formulate a plan of action, act as a unified team, and take risks in order to grow. Taking these measures situates co-teachers within a mindset of mutual engagement and joint enterprise (Guise et al., 2017). In many contexts of education today, however, teachers at varying levels in their careers continue to work alone with limited opportunities to talk with their colleagues about teaching, and they face
even more limitations to observe the practices of other teachers in action (Feiman-Nemser, 1998).

In a related study on collaborative practices, Cajkler and Wood (2016) presented the concept of lesson study as an opportunity for teacher candidates and their mentors to create a shared practice that requires sustained interaction. Lesson study is known as a systematic investigation of pedagogy within a series of lessons taught among a group of teachers rather than individuals (Tsui & Law, 2007). It is further detailed as a lesson that is collectively planned but taught by one teacher for the rest of the group to observe and reflect upon for improvements. The lesson study concept builds a supportive process where the focus is not just on the training of the mentor teacher, but it also provides flexibility and rigor to support novice teachers’ growth (Cajkler & Wood, 2016). In Cajkler and Wood’s (2016) study, twelve mentors and yearlong residents within varying rural and suburban placements participated in a lesson study to gauge whether it aided in the development of their pedagogy and supported the observation of student learning. The results of the lesson study revealed that residents benefited from the collaborative planning, teaching, and evaluating, but it is important to note that these benefits were not immediate. By observing their mentor implement a shared lesson and by being able to also engage with exploratory pedagogic practices, pre-service teachers felt as if they were part of the “pedagogic community of practice” (Cajkler & Wood, 2016, p. 16). Participants also expressed that the observation of teaching was commonplace, while the observation of student learning was more difficult. This is a significant finding since many teacher preparation programs require their candidates to complete observations at the beginning of yearlong residency experiences, but there is so much taking place within a classroom that the intent of the observations may become muddled. Without provided guidance, muddled observations can further distance pre-service
teachers from the pedagogic community. As part of a pedagogic community, pre-service teachers find a sense of belonging not only in the classroom but also in the school as a whole since they have the opportunity to engage with different learners and begin to make sense of their own teaching practices (Thompson & Schademan, 2019).

When viewed from a holistic standpoint, co-planning demands nuanced conversations that require professional development in order for in-service and pre-service teachers to reach the ultimate goal of co-teaching (Ricci et al., 2019). Recent literature addressed professional development offered by preparation programs as a means to prepare mentors for their work as teacher educators (Guise et al., 2016; Wexler, 2019; Wexler 2020c), but the specifics of mentoring professional development are not discussed at length within the literature. Oftentimes, the notion of professional development can be interpreted in various ways with the clinical director or university supervisor leading orientations or seminars for professional growth. Education preparation programs can address the co-planning exchange and the facilitation of effective mentoring relationships by preparing mentor teachers to understand their roles and expectations as mentors by going beyond the typical meetings and having university faculty model strategies for use during the clinical experience (Russell & Russell, 2011). Co-planning conversations at the beginning of yearlong residencies can move beyond mentor teacher and student teacher involvement and can also include conversations with university faculty. In a case study by Strieker, et al. (2020), 13 co-teaching coaches (retired principals, teachers, and a university faculty member) collaborated with 39 teacher candidates and their mentors who were engaged in yearlong, co-taught clinical experiences. The co-teaching pairs were situated within four elementary, two middle, and three high schools within a metropolitan school district of the southern US. Co-teaching coaches and mentor teachers participated in professional development
that targeted the use of co-teaching and mentoring. Results indicated that mentors exhibited a willingness to participate in conversations that led to improved candidate and P-12 student performance. The co-teaching coaches facilitated candidate goal-setting conversations that led to cogenerative conversations around monitoring the teacher candidate’s progress with their goals and the goals centered around student learning. This exhibits how co-planning encourages pre-service teachers to use available data about student learning outcomes to influence pedagogical decisions (Gallo-Fox & Scantlebury, 2015). The benefits of co-planning are often stifled by significant and varied challenges within mentoring relationships.

**Challenges of Co-planning Conversations**

Once there is failed communication in a co-planning partnership, tensions begin to rise and there is diminished co-respect (Gallo-Fox & Scantlebury, 2015). Time for establishing relationships and planning for co-teaching is difficult to accommodate in a teacher’s schedule, as evidenced in Gallo-Fox and Scantlebury’s (2015) ethnographic study. This research followed a cohort of seven secondary science student teachers, their mentor teachers, and the school’s inclusion teacher to understand more about the tenets of collaborative meetings and how cogenerative participation supported teachers’ growth. Results demonstrated how co-teachers were frustrated when other members of the co-teaching relationships failed to complete tasks as agreed upon, did not prioritize lesson preparation, or withheld changes to lesson plans. Many co-teachers modified lessons as the day progressed, but another challenge of their co-planning conversations resulted in finding the time to reflect on lesson implementation and adjustments. Research has shown that instructional capacity is limited when teachers do not perceive themselves as participants in their own learning, and it is echoed in the literature that participation is a key factor for co-teachers (Gallo-Fox & Scantlebury, 2015; Soslau, 2019).
While teachers were observed making adjustments in situ, these on-the-spot coaching moments should not replace contributions made during reflective conversations. Co-teaching partnerships are rooted in the ability for co-teachers to recognize that setting aside time for co-planning conversations is of utmost importance (Pratt et al., 2017).

Without making time for co-planning conversations, co-teachers are left working in a parallel or reactive manner (Murawski & Lochner, 2011). In a case study conducted within a high school math class in a suburban school district in the northeastern region of the US, Rhoads et al. (2013) sought to understand more about how the interpersonal difficulties of a mentor teacher and student teacher can contribute to a strained relationship during the student teaching experience. Results indicated several notable causes of tension within one mentor/mentee relationship: differences about freedom to choose teaching methods, different ideas about content that should be taught, the student teacher’s difficulty with time management, mentor interruptions during the student teacher’s lesson, differing ideas of the role of feedback, and a strained personal relationship. While the mentor in this study thought she was providing her teacher candidate with enough freedom, there were instances where she required the student teacher to perform certain tasks in a particular way. In an additional interview with the university supervisor who worked with this mentor/mentee pair, the supervisor did not discuss the tensions that were at play within the mentor/mentee relationship. This led researchers to conclude that the supervisor was unaware of any difficulties. These tensions require attention through what is echoed in the research about mentor-mentee relationships: the importance of mutual respect among partners and an open mind for reciprocal learning.

While Hurd & Weilbacher (2017) were able to identify co-planning benefits, their findings also represented what Rhoads et al. (2013) described as the need to have an open mind.
In their qualitative study, Hurd & Weilbacher (2017) examined the benefits of co-planning, co-teaching, and co-assessing for eight teacher candidates, nine mentor teachers, and ten faculty instructors who were part of a middle school education program in the Midwest US. There were several challenges uncovered about the co-teaching approach. One of the co-teaching challenges was what they described as “The unidentified co-teacher” (p. 12). In one of their interviews, a co-teacher responded that she did not identify herself as a co-teacher because she was the only person in her classroom. This led researchers to believe that some co-teacher identities are not shaped by what they do but by their physical space and the sharing of that space. Mentors must move beyond providing pre-service teachers with just a place to teach and begin to engage with professional development that addresses their professional identities as educators at a deeper level (Hall et al., 2008; Van Ginkel et al., 2016). Other researchers echoed this suggestion by calling for joint professional development opportunities from the preparation program where mentors and teacher candidates can reimagine education and mentoring with an open mind, and as such, become co-teachers who embark on a journey of collaborative practice (Goodwin et al., 2016, Guise et al., 2017; Soslau et al., 2018).

Findings by Hurd and Weilbacher (2017) mirrored the research by Guise et al. (2016) when they sought to understand the factors that encouraged or discouraged the implementation of co-planning, co-instructing, and co-assessing between a mentor-mentee dyad in a high school biology class. One of the major challenges that appeared in their research was the co-teacher’s dispositions toward professional growth. While they found that personality measures are important to the camaraderie of a co-planning and co-teaching relationship, the mindset of collaboration, reflection, and growth is of great importance. In similar research, Gallo-Fox and Scantlebury (2015) stated that it is important for mentor teachers to be aware of their dual role.
responsibilities as a teacher and learner while serving as a facilitator of learning for pre-service teachers (Gallo-Fox & Scantlebury, 2015). As such, having an openness to learn is important, and Guise et al. (2016) suggested preparation programs survey mentor teachers to assess whether they possess the motivation for collaborative and reflective practice to serve as a co-teacher. With varying years of experience and differing depths of knowledge converging in one classroom, conflicts of power are inevitable. While low levels of disagreement help to maintain a pleasant atmosphere, high levels of agreement hamper mutual growth between mentor teachers and student teachers (Tillema et al., 2011). The question becomes how to form a balance that allows co-teachers to cross barriers of understanding.

While the process of co-planning is meant to foster collaboration, another concern is that teacher candidates will not be able to survive once they transition to their own classrooms because they will lack the finesse to plan for and deliver instruction independently (Chu, 2019; Guise et al., 2016; Murphy et al., 2015). To abate reliance on co-planning methods, Murphy et al. (2008) advocated for the use of co-teaching in addition to or alongside independent teaching opportunities. A combination of solo and co-teaching opportunities allows for solo and partner planning opportunities where mentors and mentees can experiment with different strategies that work best for them and their pupils. Without understanding how co-planning works, the beneficial aspects of having two teachers within a classroom go without recognition, and co-teachers circumvent opportunities to excel through co-planning conversations.

However, terminology within the field is often used interchangeably and apparently, somewhat randomly. In the next section, a lexicon of terms germane to a study of co-planning and co-teaching initial conversations at the negotiation stage are addressed.
Important Terms for this Research

The American Association of Colleges for Teacher Education (AACTE) formed the Clinical Practice Commission (CPC) in 2018 to not only examine clinical practice but also provide recommendations for preparation programs nationwide based on evidence collected from the field. The AACTE represents more than 800 postsecondary institutions and advocates for high-quality, evidence-based teacher preparation through research and collaboration. The state chapter in Louisiana is known as the Louisiana Association of Colleges for Teacher Education, which is an organization that has vehemently advocated for policy updates that reflect the best interest of teachers who engage with Louisiana’s yearlong residency requirements. In 2018, AACTE and CPC released the Common Language Proclamation, which articulated common roles and responsibilities for educators involved with clinical teacher preparation, thereby creating a unified vocabulary for policy development, funding, and evaluation. Known as the lexicon of practice, there are definitions for terms that are considered traditional and fundamental to the student teaching experience such as mentor teacher and teacher candidate. Those terms from the lexicon are described below. The lexicon does not account for the dichotomy of expectations between school site expectations and university expectations for preparation, which creates a stalemate for teacher preparation reform. Separate but related areas are described next.

Cogenerative Dialogues

_Cogenerative dialogues_ are defined as open discussions where all participants have equal voice in the co-generation of their praxis for an activity, lesson, or assessment (Guise et al., 2016). Cogenerative dialogues can include multiple audiences that include a combination of mentor teachers, pre-service teachers, university supervisors, and administrators taking on a dialectical approach in order to improve the efficacy of planning conversations (Guise et al.,
Cogenerative dialogues have the potential to dismantle power differentials by valuing the input of all participants. The ultimate impact of cogenerative dialogue is achieved when co-teachers, both novice and expert, discuss how students respond to different teaching styles and develop methods to reach struggling students through co-planning (Hurd & Waeilbacher, 2017). Research by Scantlebury et al. (2008) provided key terms for cogenerative dialogues that help mentor teachers, teacher candidates, and university supervisors understand more about the different dialogues that can occur within co-planning conversations. While these cogenerative frames are not exclusive, they do provide a consciousness for co-teachers to evaluate the efficacy of their co-planning conversations and hopefully move beyond scheduling to planning for student learning. There are four types of cogenerative dialogue: brainstorming, critical, managerial, and reflective. These four terms are addressed first in the list of terms.

**Brainstorming Cogenerative Dialogues.** Brainstorming cogenerative dialogues allow teachers to make implicit knowledge explicit as they explore curriculum resources, discuss standards, navigate scripts, and set expectations for the lesson.

**Critical Cogenerative Dialogues.** Critical cogenerative dialogues call attention to limitations in the curriculum when teachers recognize that the curriculum may not meet the needs of every student.

**Managerial Cogenerative Dialogues.** Managerial cogenerative dialogues include the identification of co-teaching responsibilities or strategies to use throughout the lesson, while also accounting for who is responsible for preparing the lesson materials.
**Reflective Cogenerative Dialogues.** Reflective cogenerative dialogues use formative and/or summative student data from previous lessons to inform future lessons, which requires analysis of student work and discussions from monitoring student progress during lessons.

**Co-Planning**

Co-planning during the capstone experience of student teaching is requisite practice, but the definition of co-planning within the literature encompasses multiple and varying interpretations. For the purposes of this research, *co-planning* is defined as a professional development activity for teachers to share ideas, reflect, and develop the long-term and day-to-day instructional sequences that will help students achieve the identified objectives (Pratt et al., 2017; Scantlebury et al., 2018; Swanson & Bianchini, 2015). Mentors who engage with their mentees through a co-planning relationship exemplify Feiman-Nemser’s (2001) conception that teacher practices are in a constant state of transformation throughout their careers. This process of transformation begins with deliberate efforts by teacher educators who model interactive, content-rich teaching and who also create opportunities for pre-service teachers to experience teaching as learners.

**Co-Teaching**

Drawing from the research of Pratt et al. (2017), *co-teaching* is defined as the mutual engagement of mentor teachers and teacher candidates with co-planning, co-instructing, and co-assessing with an emphasis on student learning. Co-teaching is an opportunity for mentor teachers and teacher candidates to link theory and practice through co-planning conversations (Scantlebury et al., 2008). Both co-planning and co-teaching foster a dialectical position that characterizes the classroom teacher and pre-service teacher as producers and consumers of knowledge that are mutually respected (Kerin & Murphy, 2015).
Educative Mentoring

Mentoring presents an opportunity for novice teachers to develop the skills and dispositions necessary to talk about teaching and learning (Feiman-Nemser, 1998). The notion of educative mentoring differs from the traditional definition of mentorship since it revolves around a mentor’s ability to have “an explicit vision of good teaching and an understanding of teacher learning” (Feiman-Nemser, 2001b, p. 18). Feiman-Nemser’s (1998) educative mentoring framework functions to offer an understanding of how teachers learn to teach as they go through multiple stages of their career: (1) pre-service, (2) induction, and (3) continuing professional development (Feiman-Nemser, 2001). This research will focus on the pre-service stage of educative mentoring and how co-planning can serve as mentorship.

Mentor Teacher

A mentor teacher is a school-based teacher educator who helps novice teachers hone their craft during clinical practice experiences such as yearlong residencies (AACTE, 2018; Goodwin et al., 2016). Mentor teachers also help to acculture new teachers to the school community (Strieker et al., 2020).

Mentor-Mentee Dyads

For the purposes of this research, mentor-mentee dyads are defined as the coupling of mentors and resident teachers as they build a shared language, share a repertoire of reasoning, take risks together, and co-develop ambitious practices (Brondyk & Searby, 2013; Thompson et al., 2015).

Resident Teachers

In the literature, candidates who engage in a yearlong teacher residency are often referred to as student teachers or residents. For the purposes of this research, and to align with the
terminology of the preparation program, *resident teachers* or *residents* are defined as pre-service teachers who spend two semesters, or the duration of a school year, under the tutelage of an experienced mentor (Garza et al., 2018). Throughout the duration of the yearlong residency, teacher candidates receive ongoing mentorship and support from a mentor teacher (Gatti, 2019; Guha et al., 2019; Mourlam et al., 2019).

**Student Teachers**

For the purposes of this research, *student teachers* are defined as pre-service teachers who spend one semester under the tutelage of an experienced mentor. These are important distinctions for this research since the preparation provider and the state where this research will be conducted concurrently host semester-long student teachers and yearlong residents.

**Teacher Candidate**

A *teacher candidate* is an individual enrolled in a teacher preparation program who has the opportunity to work in authentic educational settings and engage with the pedagogical work of teaching (AACTE, 2018).

**Yearlong Residency**

A *yearlong residency* is defined as a yearlong clinical placement for teacher candidates who are concurrently enrolled in coursework that bridges theory and practice. Teacher candidates are supported during this year through a school-university partnership (AACTE, 2018).

**Research Questions**

The following research questions frame this study. A central, overarching question was supported by three sub questions.
Central Research Question: How do mentors and resident teachers initiate the use of co-planning at the beginning of a yearlong residency?

(RQ1) In what ways do co-planning conversations serve as professional development for mentor teachers and yearlong residents?

(RQ2) How does the mentor-mentee relationship develop through co-planning?

(RQ3) In what ways are cogenerative dialogues incorporated in co-planning conversations at the beginning of a yearlong residency?

Summary

In this chapter, the issue of co-planning at the beginning of a yearlong teacher residency was presented and briefly explained. Co-planning was framed as a professional development activity where experienced mentor teachers and their pre-service mentees can establish collaborative relationships and destabilize power differentials that exist within the traditional student teaching paradigm. While co-planning perspectives are represented in the literature during or after the experience occurred, there is a gap in knowledge about how co-planning conversations develop and occur at the beginning of the yearlong residency.

In Chapter 2, a comprehensive review of literature is presented. Chapter 3 contains the current study.
CHAPTER TWO. LITERATURE REVIEW

In this second chapter, an international review of pertinent literature is presented surrounding the issue of co-planning perceptions and the interactions of mentor teachers and their mentees at the beginning of a yearlong residency. This literature review is divided into several major areas: advent of the yearlong residency, local context, roles and responsibilities of mentor teachers, roles and responsibilities of student teachers/residents, experiences with and perceptions of co-planning communication strategies, and challenges of matching and selection.

Literature Review Search

For the purposes of this literature review, a Boolean search was conducted for peer-reviewed articles related to mentor teachers, co-planning, and teacher preparation in order to gauge the impact of each on educative mentoring as defined in question one. The following keywords were used in various combinations with varying Boolean operators (and/or): yearlong residency, teacher preparation, student teaching, yearlong, residency, mentor selection, co-planning, co-planning conversations, co-teaching, cogenerative dialogue, and teacher leadership. Academic Search Complete, ERIC, and Google Scholar were the search engines used for this research.

The articles gleaned from the searches had to meet the following initial review criteria: peer-reviewed journals were given preference; research could stem from the US and countries abroad if it discussed mentorship or co-planning practices; research had to include methods surrounding university-based teacher education programs, including traditional and alternative pathways; research discussed the pre-service experience and could also include the experiences of first year teachers; findings were gathered from a mix of qualitative, quantitative, and mixed methods studies; articles published from 2015 to present were given precedence, and articles
before 2015 had to contain necessary perspectives not discussed in the current literature. Whole books were considered based on recommendations elicited from the literature and through discussions with other experts in the field.

**Advent of Yearlong Residency**

The model for clinical experiences and student teaching has not experienced a revolutionary shift in decades (Bacharach et al., 2010; Darling-Hammond, 2010; Guha et al., 2016; Solomon, 2009; Stanulis et al., 2014;). Many candidates in teacher preparation programs experience a traditional model of student teaching that begins with observations followed by the gradual assumption of teaching responsibilities (Darling-Hammond, 2010; Gallo-Fox & Scantlebury, 2015). Smith (2005) called for university and school-based teacher educators to focus on collaboration and negotiation in order to move beyond the mindset of novices gaining immediate competence and building a focus toward learning for newcomers and experts. This is a significant paradigm shift that bequeaths the hierarchical framework of teacher education programs since it provides a proactive approach for developing novice teachers for their long-term responsibilities (Zeichner, 2010).

Current residency models are linked to the Master of Arts in Teaching (MAT) Programs, which can be traced back to the 1960s and 1970s during the time teacher shortages were beginning to proliferate (Guha et al., 2016). Teacher residency programs, as they are more commonly known today, were piloted in 2001 in Chicago with subsequent programs in Boston and Denver. A similarity between the MAT programs that started in the 1960s and modern residency models is that residents work with experienced mentors before becoming a teacher of record (Guha et al., 2016). Other significant characteristics of modern yearlong residences include the culmination of theory and practice, university-community-school partnerships,
yearlong cohort model, financial support for residents in exchange for teaching commitments, cohorts of residents within the same school, and ongoing support and mentorship for graduates (Gatti, 2019; Guha et al., 2019). Most beneficial to P-12 students is the implementation of a co-teaching approach and analysis of school assessment data to measure the impact residents have on student learning (Henning et al., 2018; Mourlam et al., 2019). Since residencies allow for two teachers of varying experience within one classroom, P-12 student learning benefits from having teachers who become more confident by employing a greater variety of complex teaching strategies (Henning et al., 2018). Not only can teacher residencies impact P-12 student learning, but they also have the potential to address teacher retention in urban schools.

Urban Teacher Residencies (UTRs) work to address the critical shortage of qualified and certified teachers in high-need areas such as math and science and in high-need communities (Ehrich et al., 2004; Ricci et al., 2019). The intensive and supportive learning experiences inclusive of such residencies lead to teacher candidates committing to teach within high-needs, urban schools. Gatti (2019) utilized a case study approach to learn more about the experiences of two resident student teachers who respectively conducted their residencies at a teaching academy and a turnaround school with underserved students in an urban context. The researcher sought to understand how programmatic resources and different residency placements presented limitations and opportunities for learning to teach in urban schools. Results indicated that although both residents reflected and addressed the cultural, racial, and linguistic differences between them and their students, it was not a result of programmatic resources. Rather, it was attributed to their dispositional capacity. The advent of yearlong residencies provides teacher candidates with the opportunity to earn more practice working in high-need schools. In a similar study, Whipp and Geronime (2017) found that urban experiences in and out of teacher
preparation was an important factor in predicting high-poverty urban teacher retention rates. Results from their mixed methods study found that for teacher candidates who did not attend urban K-12 schools, tutoring and student teaching in high-poverty schools served as contributors to their commitment to teach within an urban school upon graduation. Studies such as these led to Louisiana’s education policy that requires teacher preparation programs to implement a yearlong residency requirement that emphasizes the placement of resident teachers in high-need, urban schools (Louisiana Department of Education, 2020). With the advent of yearlong residencies, there are renewed possibilities to diversify and strengthen the teacher pipeline. The next section addresses the conception and implementation of Louisiana’s most recent teacher residency initiatives.

**Local context - Louisiana**

Major policy shifts, such as the implementation of a yearlong residency in Louisiana, were precipitated by a 2014 Louisiana Department of Education (LDOE) survey. The survey collected data from new teachers, education preparation programs, and the school districts that hire teachers to better understand how educator preparation aligns with school and district needs. Results indicated that 50 percent of teachers with one to five years of experience were not prepared for the realities of the classroom and only 39 percent of school and district leaders regularly collaborated with preparation programs (LDOE, 2014). Mentor teacher training policies in Louisiana were born out of a need to support new teachers and provide experienced teachers with opportunities to further their careers and professional skills. Roegman and Kolman (2020) attested to the need to train mentor teachers in their review of policies, which indicated variation in expectations between states. In October 2016, the Louisiana Board of Elementary and Secondary Education (BESE) codified policy to enact a mandatory yearlong classroom
residency where teacher candidates are paired with an experienced mentor teacher who has been through a state-approved mentoring program (LDOE, 2022). By July 2018, all teacher preparation programs were expected to include a yearlong classroom residency as part of their curriculum with programs fully transitioning to this model by fall 2022.

In comparison to other states, Louisiana is one of 20 states to host residency programs for teacher preparation (Education Commission of the States, 2019). While the statutes vary for each state, Louisiana joined the residency movement with its neighboring states of Arkansas, Mississippi, and Texas. The origin of teacher residency also varies greatly for each state. For example, as of 2019, teacher residency in Mississippi was not required by way of state statute or legislation, but the state department of education offered the Mississippi Teacher Residency. Likewise, in South Dakota, there were no regulations or statutes, but all public preparation providers in the state required a yearlong residency model. Interestingly, as of 2019, there are 20 states that support yearlong teacher residencies and 30 states that did not require the yearlong residency model (Education Commission of the States, 2019). Given this data, there is evidence that the yearlong residency model in education is gaining traction. Tables 1-4 identify the status of teacher residencies within various states.

Table 1. States with Residency Programs required through Statute or Regulation.

<table>
<thead>
<tr>
<th>Arkansas</th>
<th>California</th>
<th>Colorado</th>
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</thead>
<tbody>
<tr>
<td>Illinois</td>
<td>Indiana</td>
<td>Iowa</td>
</tr>
<tr>
<td>Louisiana</td>
<td>Maryland</td>
<td>Minnesota</td>
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<tr>
<td>New Jersey</td>
<td>Rhode Island</td>
<td>Tennessee</td>
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<tr>
<td>Texas</td>
<td></td>
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</tr>
</tbody>
</table>

Source: Education Commission of the States (2019).

Table 2. States with Residency Programs not Required through Statute or Regulation but Supported through Funding.

<table>
<thead>
<tr>
<th>Delaware</th>
<th>Michigan</th>
<th>New Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>Virginia</td>
<td></td>
</tr>
</tbody>
</table>

Source: Education Commission of the States (2019).
Table 3. States with Residency Programs not Required through Statue or Regulation and not Supported Through Funding.

| Mississippi | South Dakota |

Source: Education Commission of the States (2019).

Table 4. State without residency programs.

<table>
<thead>
<tr>
<th>Alabama</th>
<th>Alaska</th>
<th>Arizona</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connecticut</td>
<td>Florida</td>
<td>Georgia</td>
</tr>
<tr>
<td>Hawaii</td>
<td>Idaho</td>
<td>Kansas</td>
</tr>
<tr>
<td>Kentucky</td>
<td>Maine</td>
<td>Massachusetts</td>
</tr>
<tr>
<td>Missouri</td>
<td>Montana</td>
<td>Nebraska</td>
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<tr>
<td>Nevada</td>
<td>New Hampshire</td>
<td>New York</td>
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<tr>
<td>North Carolina</td>
<td>North Dakota</td>
<td>Ohio</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>Oregon</td>
<td>South Carolina</td>
</tr>
<tr>
<td>Utah</td>
<td>Vermont</td>
<td>Washington</td>
</tr>
<tr>
<td>West Virginia</td>
<td>Wisconsin</td>
<td>Wyoming</td>
</tr>
</tbody>
</table>

Source: Education Commission of the States (2019).

To help facilitate the introduction of the yearlong residency model within Louisiana, and to spotlight the importance of mentoring, the LDOE partnered with an out-of-state university and a non-profit organization to develop and deliver a mentor training program (LDOE, 2022). The LDOE began offering mentor training in 2017 with materials and sessions led by the Ohio-based organization, Learning Forward. The onset of mentor training addressed a concern in the literature that there is a lack of guidelines for good mentoring from preparation programs or state education agencies (Boreen et al., 2009; Clarke et al., 2014; Roegman & Kolman, 2020; Valencia et al., 2009). During the first year of mentor training, mentor teacher participants did not have access to the mentoring assessments since the assessments were not ready for publication. It was not until the second year of training that the mentoring assessments were published by BloomBoard, a Pennsylvania-based company. Once the assessments were published, mentor training participants experienced the misalignment between the content of the nine in-person training sessions and the assessment expectations. After delivering the mentor training for three years, the LDOE opened a request for proposals from outside organizations,
such as traditional teacher preparation programs or alternative certification programs, to serve as providers for mentor training. All providers must adhere to the same tenets of the state’s mentor training which include facilitating mentors’ relationship building with residents, analyzing residents’ areas for growth, developing coaching plans, and tracking resident progress. Mentor training providers are also required to contract with BloomBoard in order to gain access to the mentoring assessments, and each mentor participant has a BloomBoard assessment fee of $175 attached to their registration.

Not only do the Louisiana teacher residency policies describe the type of mentoring expected for residents, but it also suggests the types of placements for universities to consider. The LDOE policy suggests that undergraduate resident teacher placements are within high-needs schools. Bulletin 996 is inclusive of policy where high-needs schools are defined as those with a high percentage of minority or economically disadvantaged students and schools that are not geographically proximate or widely used by teacher preparation providers (LDOE, 2021). While this policy is meant to increase the recruitment and retention of undergraduate teacher candidates in urban schools, the preparation program that served as a catalyst for this research identified a lack of certified teachers to serve as mentors in urban schools.

As preparation providers attempt to meet placement guidelines, it calls to question the quality of mentors who are prepared to engage with the demanding and intricate work of mentoring. Quality mentors guide pre-service teachers to develop a substantial repertoire of practices that will allow them to teach in responsive, learner-centered ways (Darling-Hammond, 2010). While these are desired attributes, those who are certified and qualified to serve as a mentor are often reluctant to serve because of the already increased pressure and workload that comes with teaching at a high-needs school (Garza & Harter, 2016). Teachers are increasingly
held to accountability and policy measures that provide tremendous pressure and narrow flexibility to achieve P-12 student growth (Goodwin et al., 2016). Mentor teachers manage demanding professional workloads, and when coupled with the day-to-day demands of teaching, the act of mentoring can present itself as a conflicting and burdensome role (Sulentic Dowell et al., 2020). Mentoring is often viewed by some as the panacea to teacher induction, but it is important to consider the professional development that universities and school districts can provide to alleviate change and conflict presented in a mentor’s professional life as result of mentoring. (Bradbury & Koballa, 2008; Sulentic Dowell et al., 2020). To incentivize the work required of mentors and to compensate residents during this yearlong experience, BESE approved a funding package that provides mentors with a $1,000 stipend and mentees with a $1,800 stipend. Despite these efforts, mentor shortages are a persistent topic of conversation among Louisiana preparation providers.

Speaking from the local context, mentor shortages are further produced by the promotion of mentor-trained teachers to more centralized school and district leadership roles. Since the knowledge and skills that mentors garner from their participation in mentor training are frequently used for more centralized leadership roles, university programs remain plagued by mentor teacher shortages despite the number of teachers who are trained as mentors each year. From 2017 to 2021, Louisiana documented more than 2,000 trained mentor teachers, and the LDOE is working through a reporting process to maintain accurate records of who is still in the classroom, who may have left for leadership roles, or who may have retired (LDOE, 2022). In 2020, policy revisions were adopted to decrease the number of performance-based assessments required for the mentor credential from six to four (two mentoring assessments and two content-based assessments). In September 2021, additional policy revisions reduced the number of
assessments from four to two, with the emphasis on the two mentoring assessments (mentoring to improve classroom management and mentoring to improve content instruction). In addition to these revisions recommended by a mentor workgroup comprised of district leaders, preparation providers, and mentor training providers, additional policy revisions also expanded the criteria for mentor teachers. To increase the number of mentors eligible to work with yearlong residents, the LDOE will also honor previous certifications such as educational leadership and National Institute for Excellence in Teaching (NIET) trained evaluators. While this policy adjustment considers a teacher’s qualifications beyond their participation in mentor teacher training, it is still a hindrance to partnering pre-service teachers with qualified mentors who do not meet the prescribed criteria.

As residencies evolve, the duration of time spent within school systems varies by the requirements set forth by each preparation program. In Louisiana, Department of Education policy in 2021 dictated that, depending on their area of concentration, candidates in their first semester of residency should spend at least 60 percent or 80 percent of each school week engaged at the school site. During the second semester of residency, all teacher candidates, regardless of concentration, are expected to spend a minimum of 80 percent each week engaged at the school site, while concurrently enrolled in coursework at the university (LDOE, 2022). Preparation providers in Louisiana have the option to also seek approval to offer an innovative residency model that deviates from the minimum instructional time requirements, and instead, meets a specific workforce need. Regardless of time specifics, teacher residency programs require mentors to spend more time throughout the school year with their residents, which endows mentors with the ability to make a significant impact on the pre-service teacher (Goodwin et al., 2016). It is without a doubt that the implementation of the yearlong residency in
Louisiana has been an iterative process. Figure 1 describes key points in Louisiana’s residency implantation timeline.

![Yearlong Residency Timeline for Louisiana](image)

Figure 1. Yearlong Residency Timeline for Louisiana. Source: Louisiana Department of Education, 2021.

To examine the differing perceptions of pre-service teachers who engaged with a yearlong internship compared to those who engaged with a semester-long internship, Spooner et al. (2008) administered a survey to measure the perceptions of teacher candidates on several key
criteria. The survey measured how they engaged with building relationships, the school and its policies, the pre-service teacher’s teaching ability, and whether their time in schools was relevant. All participants were part of a university that partnered with the state’s public education system to improve clinical experiences through prolonged student teaching experiences. Results indicated that pre-service teachers who were part of the yearlong experience reported that more time and experience allowed them to form better relationships and greater knowledge of school policies, but perceptions of their teaching ability were not better or worse than their counterparts who completed only a semester of student teaching. Although the data did not show significant gains from the yearlong residency, they do represent innovation in teaching and teacher preparation (Henning et al., 2016). Research on modern teacher yearlong residencies is in its infancy, but with recent interest, there will be more data to come.

The emergent research on yearlong residencies will inevitably provide more insight about the roles and responsibilities of mentor teachers and student teachers/residents than what is discussed in the following sections. The roles and responsibilities of mentor teachers are often defined by their local contexts, but it is inevitable that beliefs and prior experiences can influence a mentor’s expectations of their work with a mentee (Bradbury & Koballa, 2008).

**Roles and Responsibilities of Mentor Teachers**

Mentor teachers broaden the definition of how leaders are defined within the P-12 school context (Lambert, 2003). When teacher leadership is viewed as an inclusive culture concept, teachers are able to envision themselves participating in new learning that helps them aspire to higher levels of professionalism. Holloway et al. (2018) described distributed leadership as the way leadership unfolds for various actors within the school environment. Distributed leadership is viewed as a breakaway from formal leadership roles since teachers are able to maintain their
status as classroom teachers while engaging in other evaluative and supportive roles at their school. Mentor teachers are just one example of a distributed leadership role. As experienced teachers take on mentoring roles, they accept shared responsibility for the development and success of new teachers, and they bring extant knowledge to mentoring conversations (Chu, 2019; Garza et al., 2019).

Mentoring requires mentors to serve in conflicting roles as they navigate multiple contexts – the context of their school and P-12 student responsibilities and the context of teacher preparation. Roegman and Kolman (2020) described a theoretical framework that captures the many facets of serving as a mentor such as district, school, state, and federal policies, along with societal and cultural beliefs about learning to teach. They postulate that mentors address the dynamic interactions of their work within and across systems as mentors by categorizing their interactions as cascading, colliding, and mediating. Cascading refers to an action in one system triggering an action in another system. Colliding refers to instances of disagreement between systems such as mentors and mentees or state and district policies. Mediating refers to the interpretation of ideas and policies through an individual’s own lens. Government agencies, accrediting bodies, and professional organizations work to develop policies in education within their own silos, which leaves mentors in the mix of various systems. Roegman and Kolman (2020) acknowledged the importance of interaction among systems, but they also highlighted an opportunity for teacher preparation programs to work with school district partners to bridge the divide and provide better learning experiences for P-12 students, mentors, and pre-service teachers. By doing so, researchers will be able to understand more about the role of the mentor and their motivations for mentoring.
Considering the significance of mentorship, it is important to investigate the motives that drive mentor teachers and the ways in which mentors are able to provide working conditions for pre-service teachers that match their motives (Van Ginkel et al., 2016). Kwan (2005) identified three patterns of a mentor’s role: Pragmatic, interpersonal, and managerial. In the pragmatic role, mentors view themselves as a role model and someone who observes and provides feedback. Mentors can also serve in an interpersonal role where they act as a counselor, equal partner, and critical friend. This professional altruism is defined by a mentor’s selfless desire to serve. At the same time, the resident serves as a stimulus for professional growth (Garza et al., 2018). Growth is a desired component of leadership and mentorship, and this is fostered by the reciprocal process of collaborative conversations. (Ehrich et al., 2004). Lastly, when mentors serve in a managerial role, they function as an assessor and manager. Managerial mentors do not foster an environment for growth since they assess their mentees on specific details, and they often embody an instrumental mentoring conception.

In summary, the role of a mentor requires skillful navigation among multiple contexts. Mentor motivations impact how mentors and mentees navigate school-university boundaries, as evidenced by the instrumental and developmental mentoring conceptions discussed next.

**Instrumental Mentoring Conception**

The role of a mentor consists of supervisory characteristics, which at a minimum requires the mentor to have knowledge about forms and rubrics to evaluate the pre-service teacher (Hall et al, 2008). The impact of the mentor teacher goes beyond the technical details, and Van Ginkel et al. (2016) classified the motives of mentor teachers into an instrumental mentoring conception and developmental mentoring conception. Instrumental mentoring describes mentor teachers who do not view their role with mentees as an opportunity for personal learning since these
mentors see themselves as “maestros” who focus on teaching pre-service candidates how to structure a lesson as a means of conveying management and reinforcing control. With this stance, pre-service teachers face limited latitude within the classroom. To learn more about the affordance and limitations of learning opportunities when pre-service teachers work with a mentor, Braaten (2019) employed a case study method and collected data from 22 pre-service science teachers who were part of secondary science classrooms situated within the Midwestern US. One of the limitations representative of an instrumental mentoring conception included the use of “follow” teaching where teacher candidates observed mentors for one class period, then mimicked the mentor’s practices by following their exact steps for instruction during the next class period. Restrictive paths to teaching such as this precluded any opportunities for joint work, and instead, it created a sharp divide between mentor and mentee since the co-teachers in Braaten’s (2019) study labeled their practices as “your way” or “my way” (p. 78). This draws a connection to Kwan’s (2005) pattern of mentor roles where the mentor may serve in a managerial capacity as an assessor or manager of the teacher candidate’s experience.

Some mentors have measured the effectiveness of their mentorship by how well pre-service teachers are able to replicate practices modeled by them, which alienates the reciprocal process of mentorship (Braaten, 2019; Goodwin et al., 2016). Thompson et al. (2015) conducted a design-based study with 23 mentor-mentee dyads within a mix of urban and suburban schools. The study investigated how mentors and their teacher candidates shared aims and goals to improve teaching and student learning. Findings were presented within three frames: developing the novice teacher, improving teaching, and improving student learning. Results indicated that participant conversations around planning were stagnant or nonexistent in relation to the exchange of ideas as part of the developing novice teacher frame. Pre-service teachers were
given resources for lessons they were expected to implement, and they were excluded from the planning process during the first six weeks of the school year since plans were already developed. By following the traditional mentor-apprenticeship model, pre-service teachers cited difficulty with the implementation of plans developed by the mentor teacher (Thompson et al., 2015).

Like Thompson et al. (2015), Smith and Nadelson (2016) also found that experienced mentor teachers desire predictability, so they plan curriculum and instruction in advance and preclude any mentoring benefits to pre-service teachers. In a study that used a mixed methods exploratory approach to investigate mentors’ reflections about mentoring, Smith and Nadelson (2016) collected survey results from 34 STEM teachers (13 elementary, 16 middle school, and seven high school). Researchers found that elementary mentor teachers were impacted more by the process of mentoring while middle school teachers were undecided and high school teachers reported minimal influence on their teaching from serving as a mentor. Since elementary teachers are more instructionally focused and secondary teachers are more content-focused, there were stark differences in the reflective practices of each group of teachers, with middle school teachers somewhere between the groups. Smith and Nadelson (2016) postulated that secondary teachers may not consider mentoring as an opportunity to reflect on their instruction due to a limited instructional-approach perspective. Considering the different mentoring perceptions of elementary, middle, and high school teachers, it is inevitable that pre-service teachers, dependent on their grade level, can get enculturated by less effective mentors (Murphy et al., 2015). On the other hand, mentor teachers with a developmental mentoring conception see their role in the classroom as a process of continuous and ongoing development, and the mentoring relationship is equally a part of that reciprocal exchange (Van Ginkel et al., 2016).
Developmental Mentoring Conception

Developmental mentors allow pre-service teachers the opportunity to discover the meaningful components of a lesson by observing and critiquing practice, as well as encouraging reflective dialogue focused on practice. The heightened awareness of mentors with personal learning motives also allows the mentor to engage with a “co-thinker” and “co-learner” view of mentoring as a means of effective collaboration (Van Ginkel et al., 2016). This developmental mentoring conception coined by Van Ginkel et al. (2016) is similar to Kwan’s (2005) pragmatic and interpersonal mentor patterns since they represent more engagement through observation and feedback and foster growth as an equal partner. When all of these qualities are applied as a shared set of conceptual and pedagogical tools where mentors and mentees are expected to co-plan, co-teach, co-assess, and co-adjust, there are opportunities for ambitious teaching and learning to take place (Thompson et al., 2015). Co-teachers who have engaged with co-teaching practices have reported increased time for planning, teaching, and assessing (Murphy et al., 2015).

In a phenomenological study, Russell and Russell (2011) also investigated how nine mentor teachers viewed their roles as mentors as a way to understand their motivations for mentoring. Situated within middle and high school classrooms partnered with a Southern regional university, mentors characterized the major components of educative mentoring as role modeling, nurturing, supporting, sponsoring, and teaching. Mentors viewed themselves as guides who allowed mentees to gain autonomy by providing gradual opportunities to build their teaching confidence. Through this process, mentors also expressed the desire to share their knowledge and to likewise gain knowledge from new teachers. Mentor statements of feeling
“recharged” (p. 11) when working with a teacher candidate aligned with the developmental mentoring conception described by Van Ginkel et al. (2016).

Mentors who serve as guides and are willing to learn from novice teachers can be linked to Braaten’s (2019) discovery of “follow” teaching. While “follow” teaching signifies a developmental mentoring practice, it is a practice that highlights instances of developmental mentoring conceptions. Mentors who focus on collaboration through “follow” teaching encourage the development and growth of the pre-service teacher so that the developing teacher also feels autonomous and confident to evaluate lessons (Braaten, 2019; Cajkler & Wood, 2016; Wasyl & Wood, 2006). This became evident in Braaten’s (2019) study as the development of mentor-mentee relationships forged the productive adaptation of science teaching practices that were grounded in improving student outcomes. When mentors do not look at their role as an added responsibility, they are able to enhance their professional learning simultaneously with the pre-service teacher. These findings are similar to claims by Goodwin et al. (2016) that effective mentors can expand their content and pedagogic knowledge while also reinventing current practices in education. Professional learning is not only important for mentor teachers, but it is also one of the most important responsibilities that student teachers and residents have to embrace during their time in their mentor’s classroom.

**Roles and Responsibilities of Student Teachers/Residents**

Yearlong residencies provide candidates with opportunities to develop their professional identities and construct professional practices that will strengthen their capacity within the classroom as they find a balance between their personal lives, university coursework, and school site expectations (Ehrich et al., 2004; Feiman-Nemser, 2001; Henning et al., 2018; Mourlam et al., 2019). While the literature has focused on the experiences and growth of student teachers, the
role of the student teacher is more ambiguous and defined by the requirements set forth by state policies, preparation programs, and individual mentors and their conceptions of what is important to teaching. Thompson et al. (2015) discussed conversations between mentors and mentees that elicited what mentors felt were important responsibilities for teacher candidates. Thompson et al. (2015) noted the importance of having mentees develop routine times to plan instructional units with their mentors, as well as question how students will respond to instruction, considering variations in learning styles. This style of participation encouraged the co-planning and co-teaching model and placed an emphasis on student learning because dyads also constructed tools to track student learning for future instruction. While preparation programs assume that student teachers/residents can commence their roles, the literature suggests that pre-service teachers are still in search of guidance. In Russell and Russell’s (2011) phenomenological study, mentors also reported their expectations for mentees to be knowledgeable, professional, flexible, and reflective. In addition, participants discussed the importance of collaboration, patience, good communication skills, trust, honesty, and respect. Lastly, participants discussed in great detail the importance of a “code of etiquette” for mentees such as respecting professional boundaries in regard to school and personal responsibilities (Russell & Russell, 2011, p. 11).

While university methods courses focus on how to write lesson plans, there is a lack of instruction on how to negotiate issues of voice and power in order to approach planning with the mentor teacher (Smith, 2005). Without attuning to how teacher candidates can serve as ambassadors, regardless of their competency level, then novice proficiency will only improve through the narrow lens of check-off boxes suggestive of their competency (Thomson et al., 2105). Smith (2005) cited student teachers as less likely to introduce their new ideas for planning
and teaching because of the hierarchical and high-stakes nature of the mentor-mentee relationship. In order to move student teachers beyond this barrier, Smith (2005) suggested that learning to plan is synchronous with learning to collaborate, which includes honoring differing perspectives and negotiating through disagreements. From her qualitative study, Wexler (2020a) tells the story of a yearlong resident teacher who asked her mentor to change the seating arrangement so that students could work in groups, and the mentor immediately said no. The resident teacher reflected in her journal how this occurrence was discouraging, but she also realized the balance between working in a classroom with established routines and desiring more for a space where she could experiment with teaching. The mentor also reflected and later realized that she could relinquish some control and provide a safe space for her mentee to test new ideas. While these types of conversations are challenging, they are significant and illustrate how Wexler’s research exemplifies how student teachers and residents can serve as advocates for their learning while equally influencing mentor learning.

**Experiences with and Perceptions of Co-planning Communication Strategies**

Researchers described the traditional student teaching experience as an opportunity for pre-service teachers to engage with independent teaching instead of opportunities to engage with professional discussions focused on planning and assessing for pupil success (Gallo-Fox & Scantlebury, 2015). Unilateral approaches to student teaching that reinforce the separation between preparation programs and schools elicit the need to further investigate co-teaching, which is characterized in the literature as an alternative approach to traditional models of student teaching (Scantlebury et al., 2008). Exemplar co-teaching narratives, however, have proven that co-teaching is a difficult process to capture because it is natural and can occur without boundaries (Hurd & Waeilbacher, 2017). This is especially true for the co-planning
conversations that are necessary for co-teaching at the beginning of the yearlong residency. Since the mentor-mentee relationship is still in development at this point, the importance of these developmental conversations is often overlooked. Since there is a gap in the literature about how co-planning conversations evolve between mentors and mentees at the beginning of the residency, it is important to look at communication strategies that exist during the yearlong residency to understand more about the forces that have led to a collaborative environment conducive for learning.

Communication models vary across mentor-mentee dyads, but the master-apprenticeship model of teacher preparation continues to serve as a dominant model in pre-service teacher preparation (Canipe & Gunckel, 2020; Soslau et al. (2019), In a cross-case qualitative study conducted by Soslau et al. (2019), 12 mentor-mentee dyads provided video/audio evidence of co-planning, co-instruction, and co-evaluation meetings so that researchers could determine whether co-teaching provided teacher candidates with growth competence, adaptive teaching expertise, and collaborative expertise. Results indicated that mentor teachers, who were all associated with the same mid-Atlantic university program, dominated the reflective conversations of post-lesson conferences while pre-service teachers assumed a passive role throughout the discourse. The dominant voice of mentor teachers and the lack of initiative by pre-service teachers hindered the collaborative expertise that should be a quintessential component of the co-teaching experience. When mentor teachers fail to advocate for input and reflection from teacher candidates, the pre-service teaching experience becomes more about replication instead of adaptation for specific teaching scenarios (Anderson & Stillman, 2012). Collaborative reflection on lesson implementation allows for the segregation between ideal and real teaching practices, which also provides a platform to adjust and refine the lesson for future practice (Gallo-Fox & Scantlebury,
Reflective dialogue presented a form of candid collaboration that allows novice and experienced teachers to evaluate pedagogy and beliefs in order to achieve growth for themselves and P-12 learning (Heafner et al., 2014).

Like Soslau et al. (2019), Canipe and Gunckel (2020) also noted that mentors dominated conversations. In their qualitative study, Canipe and Gunckel (2020) data collection involved recorded small group conversations of 23 mentor teachers and 20 pre-service teachers patterned with an elementary teacher preparation program at a university in the southwestern US. The purpose of the video was to learn more about the negotiations of meanings as mentors and pre-service teachers discussed videos of children’s talk and ideas about scientific topics. Results indicated that mentors dominated conversations by talking the most and controlling the meanings negotiated among the group. However, imagination allowed pre-service teachers to find a mode of belonging in group conversations. Imagining how and why students responded in a certain way allowed the pre-service teacher to enter the conversation with mentor teachers.

In a similar study on negotiations, Soslau et al. (2018) employed a sociocultural paradigmatic framework to learn more about the use of huddles as a real time, adaptive learning experience during co-taught lessons. Huddles are advantageous to novice teacher development since it allows co-teachers to have sidebar conversations before, during, or after a lesson that produces immediate feedback relevant to the needs of teacher and pupil learning. In this study, 12 elementary, three middle school English, four secondary science candidates, and their mentors initiated ‘huddle discussions’ as part of their co-teaching framework. The teacher candidates in this study self-reflected on their use of huddles in journals. Results indicated that huddles provided opportunities for teacher candidates to develop adaptive expertise in the following areas: instructional strategies, questioning, classroom management, modeling, content
corrections/enhancements, pacing, and clarifying directions. Toward the end of their experience, teacher candidates initiated more huddles than their mentors, which indicated their ability to recognize times for adaptive teaching expertise. While critics may argue that huddles can interrupt instruction, this research exemplifies the positive impact huddling can have on instruction and pupil learning, whether those conversations are before, during, or after a lesson.

Like Soslau et al. (2018), Wexler (2020c) also found evidence of the importance of explicit communication strategies between mentors and mentees. For this research, Wexler followed two mentor-mentee dyads to understand more about which practices novices take with them from student teaching through their first year of teaching. The participants were situated within first and third grade classrooms, but most importantly, the mentors received support through monthly professional development study groups organized by the university education program. Mentors within this study did not take for granted that their mentees understood why certain instructional decisions were made, so they made their instructional decisions visible during co-planning and debriefing sessions. Mentors were also vulnerable by admitting when lessons did not go as intended. The critical part of their mentoring was when they reflected and pointed out how they knew this in discussions with their mentees. Lastly, mentors also made it a deliberate practice to analyze pupil work with their mentees so that there was concrete evidence as to which students met the objectives and who needed more practice. Because these practices stemmed from the mentor’s participation in study groups, Wexler emphasized the need for preparation programs to guide mentors on their journey with educative practices since these are the skills that pre-service teachers took with them during their first year of teaching.

In another longitudinal study, Wexler (2020b) examined how feedback provided by three elementary mentors helped their respective mentees to be open and critical during their student
teaching experiences. The pillar of the feedback within this study was the student teacher’s goals for improvement. Feedback was evident in the study through targeted questions that required mentees to think about how students would react during the lesson instead of waiting until it happened. Likewise, mentors also collected focused evidence related to the mentee’s growth goal. This focused feedback prevented mentor-mentee pairs from getting distracted by a slew of strengths and weaknesses that were not part of the growth target. The focused feedback offered by mentors ultimately allowed student teachers to initiate instructional changes that they may have overlooked if their feedback was not as focused. As the student teachers transitioned to their first year of teaching, the amount and quality of feedback varied significantly to the point that they craved more feedback. Communication of specific feedback is important for student teachers, first year teachers, and experienced teachers in order for them to engage with a continual cycle of improvement.

Co-planning and co-teaching are not restricted to the work between mentors and mentees in regular education classrooms but extends to other academic areas, such as the field of special education, as well. Friend et al. (2010) cited co-teaching as a result of the inclusive schools movement in the 1980s. By offering special education services in the general education classroom, education professionals including general education and special education teachers were able to cross traditional planning and teaching boundaries. Swanson and Bianchini (2015) conducted a qualitative study with five regular education and special education teams situated within two urban high schools. Researchers analyzed observational data, participant interviews, and written artifacts for five characteristics of collaboration that should be present during co-planning conversations: equal authority to contribute and decide; collaboration around common goals; shared responsibility for tasks and outcomes; each participant shares resources; and
appreciation for the collaborative process. Results indicated that teams of teachers used a consensus model to collectively decide how to move forward with a lesson, and as such, the teams of teachers held common goals and both teachers took credit for instructional materials, regardless of who created the lesson or activity. The work of Swanson and Bianchini (2015) highlighted the importance of regular education and special education teachers focusing on student-centered and inquiry-oriented outcomes. Boundary-crossing changes are representative of what is expected for co-planning to be successful between experienced mentors and pre-service teachers, but challenges arise when mentors have negative beliefs or experiences with mentoring.

**Challenges of Matching and Selection**

The proper selection of mentors is crucial to the development of the pre-service teacher, but with shortages of certified teachers, the number of volunteers who are willing to participate as mentors is limited. Agreeing to serve as a mentor can be a complex decision since classroom teachers are facing extreme pressure to place emphasis on a test-driven environment where the conditions are fast-paced, highly demanding, and mandate-heavy in a way that pressures teachers to utilize every minute of instructional time to achieve highly effective test scores, (Goodwin et al., 2016). While teachers face this pressure, preparation programs are also pressured by state policies to place pre-service teachers with mentors based on a mentor’s years of experience or their effectiveness with P-12 students (Matsko et al., 2020). However, Matsko et al. professed that there is minimal empirical evidence to support that experienced or effective teachers are the most important qualifications for a mentor. This led Matsko et al. to delve into the quality of mentorship that pre-service teachers received from their mentors. By using survey and administrative data from the Chicago Public School District, researchers wanted to learn more
about how mentors influenced the self-perceived perceptions of pre-service teachers’ preparedness to teach. The data examined teacher evaluations ratings from the school district, which included observation and VAM scores, professional qualifications such as a Master’s degree or National Board Certification, and pre-service teacher survey items on their mentor’s ability to model effective instruction. Results indicated that pre-service teachers who favorably perceived the instruction modeled by their mentors felt better prepared to lead instruction on their own. The pre-service teacher’s perceptions were fueled by the mentor’s ability to provide frequent and accurate feedback for domain-specific instruction, higher levels of autonomy and encouragement, and stronger collaborative coaching. However, factors such as VAM, years of experience, postbaccalaureate degrees, tenure, or National Board Certification did not influence pre-service teachers’ perceptions of preparedness. While many states consider the minimum qualifications discussed herein, the implications of findings by Matsko et al. is suggestive of policy that considers standards for a mentor’s experience coaching other teachers.

Despite their abilities to teach P-12 students, many teachers do not view themselves as mentors since they view it as the university’s job to teach new teachers how to teach, and they often revert to their own experiences with models of learning to teach that are not always effectual (Feiman-Nemser, 1998). Hall et al. (2008) discussed the haphazard clinical placement processes used by many universities that fail to communicate with mentors about the university's expectations for mentorship or the support services provided by the university during the mentoring process. These haphazard practices lead to mentorship and support that provides pre-service teachers with minimal opportunities to collaboratively plan instruction (Ehrich et al., 2004). It is consequently unwise to assume that experienced teachers can take on their roles as mentors without proper preparation and support (Wexler, 2019). Mentors are able to effectuate
their responsibilities when they are provided guidance about the expectations and roles surrounding mentorship through conceptions such as formal mentoring programs (Childre & Van Rie, 2017; Russell & Russell, 2011). While mentoring programs are a step in the right direction, mentee development should not be left to mentors alone. Instead, the inclusion of administrators and school support personnel can provide mentees with a more diverse, complex set of professional relationships to aide in their development (Carambo & Stickney, 2008). As educators advance through their careers, they are in a constant of learning and progress, and the same can be said of the profession, as the landscape of teacher preparation begins to experiment with professional development models of co-teaching and yearlong residencies (Guha et al., 2016; Mourlam et al., 2019; Soslau et al., 2019).

Formal professional development opportunities can take the form of university supervisors meeting with whole groups of mentors and mentees or individualized meetings of mentor-mentee dyads (Mourlam et al., 2019). Co-planning requires a team approach where co-teachers, as part of their initial professional development meetings, should have the opportunity to discuss their philosophies of education as a means of getting to know one another (Ricci et al., 2019). Guise et al. (2017) conducted a mixed methods study with eight mentor-mentee dyads in English and science classrooms to examine conditions that aid or impede a co-planning and co-teaching partnership. Results indicated that this relationship was dependent on varying interpretations and degrees of buy-in. Pre-service teachers often look to their veteran counterparts for entry into the teaching community, but this can be difficult to do if the candidate’s relationship with the school or mentor is not well-developed (Smith, 2005). Guise et al. (2017) reported that their mentor-mentee dyads did not form a collaborative relationship outside of the classroom because of differences in age and interests. Although dyads were trained
on several co-teaching strategies such as station teaching, team teaching, parallel teaching, and alternative teaching, the co-teaching methods that were used the most frequently within this study were one teach/one assist and one teach/one observe. This brings to the forefront the disillusionment that co-planning for co-teaching can occur instantaneously after training opportunities. Other findings from this research point to teaching schedule conflicts, lack of planning time, and misconceptions about the co-teaching model as evidence that warrant more co-planning and co-teaching guidance is necessary for mentors and mentees to effectively engage with mentoring work. In a similar study, Rabin (2020) described how co-teaching professional development helped to address some of the collaboration concerns presented in the research by Guise et al. (2017). Rabin (2020) conducted a qualitative study with 13 mentor teachers and 16 teacher candidates part of a large urban elementary teacher education program to understand whether co-teaching and care ethics helped mentor-mentee dyads address power differentials and develop a climate for caring, collaborative relationships. Six co-teaching workshops throughout the year allowed co-teachers to engage with the ideas of facing collaboration constraints, develop co-teaching relationships, and coaching through questioning and observations. Results indicated that it was important for co-teachers to address power imbalances and embrace a mindset to share teaching responsibilities in order for them to develop a caring relationship. By doing so, there were more opportunities to co-teach. Candidates who did not address power in the mentoring relationship failed to find opportunities for co-teaching. Research from Guise et al. (2017), Rabin (2020) and ongoing research on the impact of co-planning and co-teaching have illuminated the challenges of matching and selection and the importance of communication surrounding pre-service teaching experiences in schools.
Summary

Historically, the matching and selection of mentors and mentees is an issue rooted in classroom control and concerns over P-12 student test scores. The advent of yearlong residencies in conjunction with the co-teaching model for teacher preparation, however, presents an opportunity to redefine the roles and responsibilities of mentor teachers and resident teachers.

In this second chapter, an international review of pertinent literature was conducted surrounding the issue of co-planning perceptions at the beginning of a yearlong residency. In Chapter 3, the elements of the study are presented. These elements included research design, research questions, participants, setting, data sources, analysis, and researcher positionality.
CHAPTER THREE. METHODS

This study sought to examine co-planning dialogue that occurs at the beginning of the yearlong residency experience since much of the existing research is revelatory to co-planning perceptions during or after the experience. This chapter includes the theoretical frameworks as they relate to the act of co-planning within existing social communities at respective school sites. The overall research design is presented along with situating the setting, context, and participants involved in the study. Next, the sources for data collection, methods of data analysis, and coding procedures are outlined. Lastly, the researcher’s positionality statement, and limitations and delimitations of the study are presented.

Theoretical Frameworks

Two complementary theories frame this study. Those two theories are situated learning theory (Lave & Wenger, 1991) and activity theory (Engestrom, 2001). Both theoretical frameworks are seminal to this study.

Situated Learning Theory

Situated learning theory suggests that learning occurs when people engage with an existing culture (Lave & Wenger, 1991). While it is easy to assume that situated learning occurs as a single, unitary concept in a particular space or at a particular time, it is actually a theory that connects “perception, cognition, language, learning, agency, the social world, and their interrelations” (Lave, 1991, p. 66). The situatedness of co-planning as activity involves the whole person as they negotiate meaning and engage with learning. Learning then becomes a social phenomenon that takes place in the lived-in world. Lave and Wenger (1991) identified legitimate peripheral participation as a defining characteristic of situated learning theory and described it as “newcomers” participating in communities of practitioners known as “old-timers”
In doing so, newcomers move from peripheral to full participation. Resident teachers build their competency as they interact and receive advice and approval from the community contexts where they complete their residency experience (French, 2020). This contextual competency may or may not include variables that align with what is valued by the teacher preparation program. Since the interpretation of mentorship and the value placed on co-planning can vary by mentors, it was important to investigate the nature of mentor-mentee relationships and how they utilize co-planning within a collaborative framework.

Legitimacy of participation defines a way of belonging in a community. For a yearlong teacher residency, this is evident through the level of acceptance a resident teacher receives from the school and their mentor. This acceptance leads to peripherality of participation, which suggests “multiple, varied, more- or less-engaged and -inclusive ways of being located in the field of participation defined by a community” (Lave & Wenger, 1991, p. 36). The ability for a mentor and mentee to engage in collaborative co-planning discussions will depend upon the development of their relationship and the mentor’s perspective of mentorship. When peripherality is enabled, it can be a dynamic concept that allows newcomers to grow their involvement; co-planning is one strategy that can allow this to happen. When peripherality is constrained, mentees can feel less engaged and dependent on the directives provided by the community. Peripherality can serve as a source of power or powerlessness, and during a yearlong residency, it is important for resident teachers to feel empowered through their learning (Wexler, 2020a).

**Activity Theory**

Similar to situated learning theory, activity theory proclaims that learning occurs as part of an existing social community. Activities are viewed by Engestrom (2001) as open, goal-
oriented systems that are made up of collective communities of viewpoints, traditions, and interests whereby a division of labor exists. This division of labor is maintained by explicit and implicit rules and conventions that “define how participants are expected to behave and who is expected to do what in the achievement of the object of an activity system” (Tsui & Law, 2007, p. 1291). For yearlong teacher residencies, expectations are articulated from the school site and university. At the school site, mentors and mentees may have differing views on curriculum and instructional delivery, but it is important for them to work through these differences since tension and contradiction are important contributors to the learning of novice teachers (Engestrom, 2001). Mentors who possess a developmental mentoring conception can adapt their normative teaching practices as a result of ideas that stem from co-planning conversations with their mentee. Gatti (2019) conducted a study that utilized activity theory, and she found that the settings where new teachers learn to teach are dynamic rather than static spaces. This is evident when mentors and mentees abandon replication models of learning to teach, and they begin to employ one of the main principles of activity theory known as “the possibility of expansive transformation” (Engestrom, 2001, p. 137). With expansive transformation, participants begin to question and deviate from the established norms of the activity system. This can be accomplished through co-planning since it is an activity that has the potential to serve as a melting pot where two teachers merge their teaching identities with the goal of educating students (Berry, 1974). Novice teachers are willing to adopt collaborative teaching practices as they learn how to influence pupil achievement (Wexler, 2020a). At the same time, mentors must reciprocally engage and appreciate what the novice teacher brings to the classroom. These reciprocal relationships are representative of activity theory since novice teachers are guided by mentor teachers through a process of enculturation.
Situated learning theory and activity theory provide a theoretical lens to investigate the learning communities that mentors and mentees develop at the beginning of a yearlong residency experience. Next, research questions are provided to frame the study.

**Research Questions**

The following research questions framed this study. A central, overarching question was supported by three sub questions: How do mentors and resident teachers initiate the use of co-planning at the beginning of a yearlong residency? The three sub questions are as follows:

(RQ1) In what ways do co-planning conversations serve as professional development for mentor teachers and yearlong residents?

(RQ2) How does the mentor-mentee relationship develop through co-planning?

(RQ3) In what ways are cogenerative dialogues incorporated in co-planning conversations at the beginning of a yearlong residency?

**Research Design**

The research design selected for the current study utilized a single case study approach as defined by Yin (2018) as an empirical method that seeks to understand a contemporary phenomenon within a real-world context. Leedy and Ormrod (2016) further defined case study research as the in-depth study of an individual, program, or event for a defined period of time in order to learn more about a situation where little is known. With case study research, “the research aims to uncover the interaction of significant factors characteristic of the phenomenon” (Merriam, 2009, p. 43). The context of co-planning conversations between experienced mentors and resident teachers at the beginning of a yearlong residency appropriately aligned with a case identification that is defined within certain parameters (Creswell & Poth, 2018). Participants within this research were able to share descriptions of their experiences with co-planning
conversations and the development of their mentor-mentee relationship, and I observed and analyzed practices relevant to co-planning. By recognizing the puzzlement of co-planning conversations at the beginning of the yearlong teacher residency, I was able to recognize and substantiate new meaning that can be shared with others (Stake, 1995). Co-planning at the beginning of a yearlong residency is a critical case under the defined tenets of situated learning theory and activity theory.

As a single case, this research explored whether propositions of each theory were correct by seeking to understand more about what occurs during the onset and implementation of co-planning conversations (Yin, 2018). Legitimate peripheral participation (Lave & Wenger, 1991) and the possibility of transformation (Engestrom, 2001) are theories that rely on the existing social communities and the entanglement of interactions that occur within said communities. By investigating the early interactions of mentors and mentees, this research had the propensity to confirm, challenge, or extend the propositions of situated learning theory and activity theory.

**Setting & Context**

The preparation program included in this research was in a transition phase between the traditional one semester of student teaching and the two-semester teacher residency in a south Louisiana locale. Dependent on when they started at the university, some of the preparation provider’s candidates opted to follow the residency curriculum, while other candidates who started at the university in the fall of 2018 were required to follow the residency curriculum. By fall 2022, all candidates within the state of Louisiana will participate in a yearlong teacher residency. This is an important distinction to note since all of the preparation providers in Louisiana were at different implementation stages at the time of the current study.
For this research, mentor-mentee dyads from kindergarten through fifth grade classrooms within a 100-mile radius of a mid-sized, rural university located in the Southeastern US, were examined. Elementary teachers in local districts are often within self-contained classrooms or departmentalized classrooms. With this mixture of grade level and content areas, there were greater opportunities to corroborate the findings from this research. All school districts selected for this study had a memorandum of understanding (MOU) articulated with the preparation provider at which I was employed. At the onset of the fall 2021 semester, the preparation provider had 13 MOUs with varying districts. While all of the memorandums outlined the school district’s obligations, the university’s obligations, and mutual obligations, all of the obligations were general in nature and did not discuss the finite specifics of practice between mentors and mentees. In many cases, the MOUs were identical and fulfilled the necessary legal requirements between the university and the school district. Thus, the results of this research resulted in better developed MOUs that not only function in legal form, but in agreements that can also inform school district administrators, school-level administrators, mentor teachers, and resident teachers about the specifics of their work. Without the specifics of co-planning and co-teaching outlined as an expectation for the residency experience, there are missed opportunities to foster stronger university-school partnerships that can improve the work within each localized context.

**Participant Sampling**

The population of interest for this study was four experienced mentor teachers with at least three years of experience and the resident teachers that were paired at the beginning of a yearlong residency experience. Considering the strengths of elementary mentor teachers in comparison to middle and secondary teachers cited in the research by Smith and Nadelson (2016), elementary mentor-mentee dyads appropriately served as the focus of this study. Rubin
and Rubin (2012) advocated for the selection of organizations, places, or cases based on their relevance to the research problem and the ability to gain access. Leedy and Ormond (2016) also suggested that researchers select participants who can provide the types of information desired and offer unique insights related to the problem. According to Collins et al. (2007), a multitude of purposeful sampling schemes can be utilized for research studies. For this current study, two schemes – criterion and convenience – were appropriate. Criterion was selected as mentors who had obtained Louisiana teacher certification, had at least three years of teaching experience, and anticipated co-planning with their mentee as part of the yearlong residency experience. In consideration of the LDOE’s requirements for mentor teachers who work with yearlong resident teachers, selection criteria also considered the mentor’s participation in a Louisiana-approved mentor teacher training program. Convenience was also appropriate as partnering with mentors who are within a 100-mile radius of the university in which the residents were enrolled allowed for reasonable expenditures of time and money that was required for purposeful qualitative methods (Rubin & Rubin, 2012). Another element of convenience was that the preparation program typically hosts a robust group of elementary candidates each semester. Based on preliminary enrollment numbers for the fall 2021 semester, there were several mentor-mentee dyads across multiple school districts who met the proposed criteria for this study. In order for elementary resident teachers to participate in this research, residents had to submit passing scores for all required PRAXIS examinations prior to the start of the residency one semester. In addition, teacher candidates who were participants were enrolled in the prescribed residency course at the university.

As part of the sampling procedures, I, as the researcher and coordinator for clinical practice and residency, sent an email to all mentor teachers who partnered with yearlong
residents at the start of the fall semester. The email queried mentors about whether they typically use co-planning or if they plan to use co-planning on a regular basis as part of their mentoring work. While mentors who have been through the mentor teacher program had knowledge about co-planning and goal setting as part of the mentoring cycle, there was no guarantee that they used these strategies as part of their mentoring work. After recruiting one willing mentor-mentee dyad from the email query, I followed up with all mentors at a collaborative professional development day before the start of the fall residency semester. The professional development day provided an opportunity for mentors and mentees to foster relationships, establish partnership goals, review co-planning and co-teaching expectations, and discuss university requirements. All mentor-mentee dyads for the fall 2021 residency and student teaching cohorts were required to participate in the professional development day. After announcing a public query for participants at the collaborative professional development day, I recruited an additional four mentor-mentee dyads who provided their notice of intent to participate via email. While the study was announced to participants across all concentration areas at the collaborative day, only elementary mentors and their mentees responded with their intent to participate.

Participant Descriptions

Each participant was interviewed for approximately one hour. Participant information for the four mentor-mentee dyads who participated in the study are provided.

Ms. Susan. Ms. Susan (all participant names and school locations are pseudonyms) was a White female with 12 years of teaching experience and who was pursuing her doctorate in educational leadership. She taught 3rd grade ELA at River Elementary School, a rural PK-5 school, for the past four years. Previously, Ms. Susan worked with one traditional, semester-long student teacher. For this research, Ms. Susan worked with her first yearlong resident teacher. The
preparation program involved with this research, like many of the preparation programs in Louisiana, faced a shortage of credentialed mentors who were eligible to work with yearlong resident teachers. Ms. Susan, for example, did not participate in a mentor teacher program, but she was permitted to serve as a mentor for meeting one of the mentor waiver requirements of having highly effective test scores. Despite not being a credentialed mentor teacher, Ms. Susan’s contributions to mentoring within this research highlighted that not all mentors require a formal mentoring program in order to mentor effectively.

**Ms. Elizabeth.** Ms. Elizabeth, a White female, was a 4\textsuperscript{th} grade ELA and social studies teacher who has been at Sugar Cane Academy, a small city charter school, for 10 years. She spent the entirety of her career thus far at Sugar Cane Academy. This was the first year Ms. Elizabeth served as a mentor teacher. She earned her mentor teacher credential from Learning Forward, the entity with whom the LDOE contracted with for the first three years of mentor teacher training.

**Ms. Crystal.** Ms. Crystal, a White female, was a 5\textsuperscript{th} grade ELA and social studies teacher at Bayou Elementary School. She had eight years of teaching experience. Previously, Ms. Crystal worked with one traditional, semester-long student teacher. For this research, Ms. Crystal worked with her first yearlong resident teacher. At the time of the study, she was also enrolled in the preparation provider’s mentor teacher program and working toward her mentor teacher credential.

**Ms. Destiny.** Ms. Destiny, a White female, was a third-grade science and math teacher who taught at Sugar Cane Academy for 11 years. She had 22 years of teaching experience and held a Master’s degree in library science. In her 22 years as a teacher, Ms. Destiny served as a mentor teacher to 12 pre-service teachers who followed the traditional student teaching model.
For this research, Ms. Destiny worked with her first yearlong resident teacher. She earned her mentor teacher credential from Learning Forward, the entity with whom the LDOE contracted with for the first three years of mentor teacher training.

Jane. Jane was a White, female elementary education resident in Ms. Susan’s classroom. Prior to residency, she had two semesters of clinical experiences. The COVID-19 pandemic and the guidelines surrounding access to schools restricted her clinical experience time in the program. Jane had working knowledge of co-planning conversations from her experience at other schools prior to residency and COVID-19 restrictions.

Morgan. Morgan was a White, female elementary education resident in Ms. Elizabeth’s classroom. Prior to residency, Morgan did not have any clinical experiences within a school setting because of COVID-19 restrictions, which began in spring 2020. This research was also the first time Morgan engaged with co-planning.

Amber. Amber was a White, female elementary education resident in Ms. Crystal’s classroom. Prior to residency, Amber did not have any clinical experiences within a school setting because of COVID-19 restrictions, which began in spring 2020. Rather, most of her clinical experiences were virtual. This research was also the first time Amber engaged with co-planning. Amber was the only resident participant who indicated she had children. Amber and her mentor, Ms. Crystal, both commented how this impacted their time to meet before and after school.

Heather. Heather was a White, female elementary education resident in Ms. Destiny’s classroom. Prior to residency, Heather did not have any clinical experiences within a school setting because of COVID-19 restrictions, which began in spring 2020. Rather, most of her
clinical experiences were virtual. This research was also the first time Heather engaged with co-planning. Table 5 highlights dyads and participant information.

Table 5. Participant Demographics.

<table>
<thead>
<tr>
<th>Mentor</th>
<th>Teaching and mentoring experience</th>
<th>School configuration</th>
<th>Mentee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ms. Susan</td>
<td>12 years, 2 mentees, mentor waiver</td>
<td>Rural, PK-5, public, Title I</td>
<td>Jane</td>
</tr>
<tr>
<td>Ms. Elizabeth</td>
<td>10 years, 1st mentee, Learning Forward Mentor</td>
<td>Small city, PK-8, charter</td>
<td>Morgan</td>
</tr>
<tr>
<td>Ms. Crystal</td>
<td>8 years, 1 mentee, Program Provider Mentor</td>
<td>Small city, 4-5, public, Title I</td>
<td>Amber</td>
</tr>
<tr>
<td>Ms. Destiny</td>
<td>22 years, 12 mentees, Learning Forward Mentor</td>
<td>Small city, PK-8, charter</td>
<td>Heather</td>
</tr>
</tbody>
</table>

Unexpected Sampling Challenge

One month into the research, a major weather event closed all of the dyads’ schools for almost a month. One of the mentors lost the contents of her classroom and her home, and as she embarked on recovery efforts, it was mutually agreed upon by me and the mentor for the mentor-mentee dyad to withdraw from the study. The minimal data collected from the fifth dyad is not included as part of the analysis or results of the current study. As schools began to reopen in the weeks after the major weather event, I kept in close contact with each dyad in order to assess their ability to continue with the research and re-establish a co-planning recording schedule.

Gatekeepers

To begin this research, I sought permission from the degree granting Louisiana State University Institutional Review Board (Appendix G). As an employee of a regional university and graduate student of Louisiana State University, I also coordinated documentation from the employing institution stating their involvement with or intent to waive the institutional review process. Included as part of the application process, I noted the intent to inform mentors and
mentees that their participation in this research cannot be used for grading or as part of the educational record for those who participate. Participants selected for this research were assigned a university coordinator separate from me as researcher and author so as not to present a conflict of interest with grading and performance evaluations.

Since participants for this research were working within school districts, it was necessary to obtain written permission from the superintendents in each district and principals at each school site. As someone who works with these districts on a daily basis, I entered into these conversations with transparency about the research questions and data collection methods. After mentors were selected, the author also sought written consent from the respective mentees.

**Data Sources**

In his definition of case studies, Yin (2018) posited that a case study “relies on multiple sources of evidence, with data needing to converge in a triangulating fashion” (p. 15). Aligned with case study research methods, data collection included interviews, observations, and artifacts consisting of various documents that addressed the questions presented in this study. All data sources were embedded throughout the study’s reported findings. Since co-planning requires the participation of mentors and their mentees, it was constitutive for this research to collect data from both parties.

**Interviews**

The primary data source in this study was interviews. Interviews are an important source of data for qualitative studies (Leedy & Ormond, 2016; Kin, 2018). Merriam (2009) asserted that interviews provide ample opportunities for researchers to seek clarification and allow participants to share their knowledge, involvement, and status with a topic. For this study, I conducted one in-person interview per mentor and mentee, and the interview lasted for
approximately one hour. The interviews took place toward the end of the study, which provided time for mentors and mentees to engage in co-planning conversations before the interviews. The interviews followed a semi-structured interview protocol (See Appendices A and B) and took place via a secure Zoom account belonging to the degree granting institution. All interviews were recorded on Zoom, and the Zoom transcripts were copyedited before coding took place. The mentor teacher interview protocol consisted of 13 questions, while the resident teacher interview protocol consisted of 12 questions. Although separate protocols were used for mentor and mentee interviews, the basic tenets of the protocols revolved around the development of the mentor-mentee relationship, the use of co-planning, and the impact of co-planning as a collaborative practice for mentors and mentees.

Observations

The secondary data source in this study was observations. Observations provided a firsthand account of events in their natural environment (Merriam, 2009). In addition, information gathered from observations provided me with context for initial or follow-up interviews. One of the observations pertinent to the issue of co-planning at the beginning of a yearlong residency revolved around the development of the partnership agreement (Appendix D). The partnership agreement conversation took place during week one of the placement; this conversation prompted mentor-mentee dyads to discuss important facets of their work that are often taken for granted. Those factors include times to meet, methods of contact, responsibilities, expectations, data and instructional goals, confidentiality, logistics within the classroom, and how to handle follow-up conversations. Two additional observations focused on actual co-planning conversations that were recorded between mentors and their mentees. The recommended timeframe for each co-planning session was between 20 to 30 minutes. Dyads
received a calendar with a timeline for recording their conversations, which helped to create consistency among all participants (Merriam, 2009). Figure 2 describes the data collection timeline.

![Data Collection Timeline](image)

Figure 2. Data Collection Timeline

The first co-planning observations took place during week three of the placement when the residents began to participate in co-planning sessions while their mentor teachers served as the instructional lead. The second round of co-planning observations took place during week five of the placement when residents were slated to assume the responsibility of leading one subject area or class period (See Appendix E). The focus of the co-planning observations was on the collaborative nature of mentor-mentee relationships and the use of co-planning as a mentoring activity. It was particularly important to observe the direction of communication patterns, how the participants interacted with the activity of co-planning and with one another, and the norms and structures of the interactions. Cogenerative dialogue served as a helpful tool to monitor the reflexive dialogues between mentors and mentees, but it was not a protocol that participants had to follow.

Observations took place in person between mentors and mentees, and resident teachers video recorded their co-planning conversations using a SWIVL recording device. While the
video recording device can be obtrusive, resident teachers received a SWIVL recording device in advance so that they were familiar with the technology and used it for co-planning conversations not prompted by the study. Recording the co-planning conversations using SWIVL was deemed the least intrusive data collection method for the current study.

**Artifacts**

Artifacts are a less intrusive method of gathering data for qualitative studies but an important one. Stake (1995) argued that documents serve as a substitute for records that were not observed in other ways during the study. Artifacts relevant to this research included reflective journals, partnership agreements, and other methods of communicating between mentors and mentees such as email correspondence related to relationship building or a collaborative journal. Journals were important since they reflected the participant’s actions, experiences, and beliefs through a first-person perspective (Merriam, 2009). To gain an authentic view of mentor and mentee perspectives with co-planning, each participant submitted weekly journal reflection, which are prescribed as part of the residency requirements for all teacher candidates. The weekly reflection log (Appendix D) prompted candidates to consider their area of strength and area for growth during the week, as it relates to the NIET rubric. Concurrently, candidates described the steps they were taking to improve their area for growth and reflected on their mentor’s recommendations for improvement. In addition, mentor-mentee dyads discussed and completed a partnership agreement, which served as a supplementary artifact. Since partnership agreements are a tool for building trust in the mentor-mentee relationship, the agreements were compared to the observations of co-planning dialogue. Reviewing these artifacts allowed me to gauge how the nature of co-planning discussions and collaborative relationships merged between written documents and actual practice.
Data Analysis

Qualitative research designs are emergent, and the analysis of data should take place as data are collected (Merriam, 2009). As part of the data analysis, raw data collected from interviews and observations were transcribed using audio and/or video recordings. I began descriptive, initial coding soon after transcripts were ready for analysis. A code sheet was maintained to avoid renaming incidents, events, and descriptions as new codes. Both interview transcripts and observational transcripts as well as artifacts were coded line-by-line.

Data analysis and categorization of partnership agreement conversations, co-planning conversations, one-on-one interviews, and journal artifacts led to the culmination of three main themes: candid collaboration, dispositional capacities, and ongoing work. These themes directly supported the central research question and three sub questions. In the next chapter, I discussed each theme separately and provided supporting evidence that described the participants’ experiences with co-planning. Dialogue is presented verbatim.

Codes

There is agreement among researchers that coding is a technique that allows researchers to assign descriptive or inferential meaning to data (Merriam, 2009; Miles et al., 2014). Multiple coding strategies were applicable to this research. One coding method useful to this research was initial coding, which is also known as open coding. Saldaña (2021) described initial coding as a first cycle, open-ended approach to coding. First cycle coding progresses toward second cycle coding, which employs comparing codes for similarities and merging them or collapsing codes to the point of saturation, wherein codes cannot be merged further. Creswell and Poth (2013) further described open coding as a process that involves data aggregation for major categories.
Saldaña posited that coding enables researchers to use descriptive labeling in order to organize and group similar coded data into categories. Axial coding, also known as second cycle coding, moves codes into categories by synthesizing comparable words and phrases toward a consolidated meaning. Common categories merged to develop themes. Saldaña pulled from Rossman and Rallis’ (2003) distinction between categories and themes and defined categories as a word or phrase describing an explicit segment of the data, while themes are a phrase or sentence describing tacit processes.

As part of the data analysis, initial coding of interview transcripts and artifacts occurred in Microsoft Word. Separate documents were created for the codes from the partnership agreement conversations and both co-planning conversations. Additional documents were created for the one-on-one interviews; one document contained each mentor interview and another document contained each mentee interview. Lastly, the journal documents were also coded on a separate Word document. After initial coding, each code was designated a unique color that signified its grouping into a category. Second cycle coding was achieved through multiple iterations of Microsoft Word documents where codes were reduced to the point of saturation. Once categories were identified, a separate, unique color scheme was created to identify themes.

**Analytic Memoing**

Another useful data analysis tool was analytic memoing that illustrated my reflections and thoughts about the data and the coding process (Miles et al., 2014). The purpose of analytic memoing was to bring together different pieces of data that had the potential to serve as part of the finalized research narrative. As the research progressed, it was important to create memos that highlighted connections between interviews, observations, and artifacts. Saldaña (2021)
posited that analytic memo writing provides an avenue for reanalysis of previous coding, which requires the researcher to reflect on deeper and complex meanings of the data.

**Positionality Statement**

As a researcher, I identified with a pragmatic, constructivist framework (Applefield et al., 2000; Braaten, 2019, Moallem, 2000; Splitter, 2009; Stake, 1995). My experience as the coordinator of clinical practice and residency at a regional university in south Louisiana led to my interest in co-planning as a professional development activity for mentors and mentees and to this timely study. In my role, I help to resolve many conflicts that are a result of poor mentor-mentee relationships. These relationships also lack regular co-planning conversations. Constructivism, which emphasizes knowledge construction rather than knowledge transmission, was important to my research focus (Applefield et al., 2000). During student teaching/residency, it is important for the learner (student teacher/resident) to construct his or her own understanding of the world, and as a result, take on an active role in the process of learning to teach. Since constructivism does not prescribe a particular set of thought processes in order to achieve the objective of learning, it is a framework that encourages “thick description” about the varying perspectives and styles of mentors and mentees. A constructivist view of case study research does not include delivering generalizations, but instead, as Stake (1995) stated, constructivism encourages case study researchers to provide readers with raw materials for their own generalizing.

Moallem (2000) cited constructivism as a term stemming from Piaget’s views as “constructivist” and Bruner’s thoughts on discovery learning, which was also labeled as “constructionist.” Piaget’s theory of cognitive development is evident in the endogenous view of constructivism where learners try to solve internal cognitive conflict and make sense of new
phenomena beyond their existing schema. Novice teachers are navigating the “two-worlds pitfall” and have to make sense of conflicting expectations between coursework and field experiences (Braaten, 2019, p. 62). Splitter (2009) argued that constructivism has the potential to become relativistic, and it is important to link resident teachers’ constructs of knowledge to “real-world” perspectives or disciplines. In other words, resident teachers can reproduce false realities of knowledge if they are not prepared with authentic information. This leads to the idea that constructivist student teaching classrooms are highly organized with complex, problem-based, and real-life tasks facilitated by the experienced and novice teacher (Applefield et al., 2000). Mentors with a constructivist mindset embrace that it is acceptable for mentees to engage with productive struggle by asking their own questions and seeking their own answers. While the mentor’s role is less dominant in a constructivist student teaching classroom, they are still an integral facilitator and encourager of the novice teacher’s thought processes.

For this case study, I assumed the role of researcher as interpreter since I identified a problem with the use of co-planning at the beginning of a yearlong student teaching residency. By investigating this phenomenon, I mediated the motivations of mentor teachers who embrace co-planning and those who are still hesitant to implement co-planning. Through this study, I substantiated new meaning about the efficacy of co-planning as a form of professional development for mentors and pre-service teachers, which has the potential to transform the culminating experience of teacher preparation programs.

**Limitations & Delimitations**

Merriam (2009) claimed that case studies are limited by the sensitivity and integrity of the researcher. As researcher and author, my positionality was a potential threat to this research since I also served as the overall coordinator for the student teaching/residency program utilized
for this study. To increase internal validity and address any biases, I collected data through multiple methods, and in doing so, was able to triangulate data by comparing and cross-checking (Merriam, 2009). As the researcher, I also asked a peer to code 10% of my data and then compared coding to achieve trustworthiness. The peer reviewer, also a colleague, was asked to code co-planning conversations number one and two for the same dyad. The peer reviewer presented questions about two codes that were very similar after the first cycle of coding: mentor explains lesson and mentor implicit knowledge made explicit. Through peer debriefing, I came to an agreement with the peer reviewer that mentor explains lesson and mentor implicit knowledge made explicit should be coded the same. Through this debrief, 100 percent agreement was achieved for the co-planning conversations coded by the peer reviewer.

Another limitation for this research was the pool of participants mined from the preparation program. Historically, the preparation program graduates a majority of White students who collaborate with mostly White mentor teachers. Having more participants who represent a variety of backgrounds that include race, ethnicity, and age would have been ideal for the generalizability of this study, but the selection of mentee participants was limited by the residency pool for the fall 2021 semester. Nonetheless, gaining insights from the varying elementary grade level tiers will possibly inform future research about the receptivity of co-planning as a professional development activity and its impact on the developing mentor-mentee relationship.

Video technology has the potential to influence the behaviors of participants, so to account for this limitation, participants were encouraged to use the SWIVL device throughout the semester for reflective purposes. Although video recording equipment can be obtrusive at first, the dyads became accustomed to the devices during the interviews and observations.
The time of the school year in which this study took place presents another limitation since the beginning of any school year can be challenging as teachers and students engage in the process of learning about each other and any adjustments to routines and expectations for the school year. However, the first five weeks of the school year was an important factor to the context of this study. Future studies, discussed in Chapter 5, can expand the definition of the beginning of the school year.

Delimitations are defined as what the researcher is not going to do as part of the study (Leedy & Ormond, 2016). This research investigated the processes of co-planning and how it impacted the mentor-mentee relationship as a professional development activity. As such, observations focused on co-planning conversations in their natural state, and as the researcher, I did not participate or intervene in the conversations. Observations did not include how co-planning conversations function in practice through observations of co-taught lessons. While not observing instruction was a delimitation, it also served as a limitation for this research since the current research was not able to capture what occurred next in the process. Additionally, while co-planning conversations should occur throughout the yearlong residency, this research focused solely on co-planning conversation limited to the beginning of the residency. The beginning of the residency was defined as the first five weeks. Lastly, co-planning conversations should be fluid. The use of cogenerative dialogue provided a framework to categorize varying co-planning conversations. However, this research did not measure the frequency of cogenerative dialogues in co-planning conversations.

**Summary**

In Chapter 3, a single case study approach was presented as the research design that best suited the exploration of co-planning conversations between experienced mentors and mentees at
the beginning of a yearlong residency. This chapter also discussed the local context of a preparation program in a south Louisiana locale and how state policies influenced the implementation of its yearlong residency program. Participants were identified as mentors with at least three years of experience and their mentees engaged in a yearlong residency from selected kindergarten through fifth grade classrooms. Each mentor possessed varying levels of experience and credentials and because of COVID-19, each mentee also possessed varying levels of experience in the classroom before the yearlong residency. Interviews, observations, and artifacts were identified as the primary sources of data. Data analysis procedures, limitations, delimitations, and the researcher’s positionality were also discussed.

In Chapter 4, findings are presented through the representation of the three themes that emerged from data analysis. Chapter 5 contains a discussion of implications and potential future research regarding co-planning conversations and cogenerative dialogue.
CHAPTER FOUR. RESULTS

The goal of a case study (Yin, 2018) is to understand a contemporary phenomenon within a real-world context. Co-planning is one phenomenon within the novelty of the yearlong residency in Louisiana. In this chapter, I present findings from a single case study design with ample data sources that illuminated the contents of mentoring conversations early on within the context of the yearlong residency. Comprehensive analysis of data through observations, interviews, and artifacts elucidated the aspects of co-planning conversations that help experienced and novice teachers in their work together at the beginning of a yearlong residency. Descriptions of the mentor teacher and resident teacher participants are provided. Following these descriptions, the three themes that emerged from the data analysis are discussed.

Introduction

The purpose of this study was to investigate co-planning conversations at the beginning of a yearlong residency in order to better understand what aspects of their conversations help mentors and mentees expand their expertise and develop a mutually beneficial mentoring relationship. Through the analysis of data from co-planning conversations, mentor and resident insight, and journal feedback, findings are presented on how learning occurs when resident teachers and their mentors combine their experiences within an existing social culture.

Central Research Question: How do mentors and resident teachers initiate the use of co-planning at the beginning of a yearlong residency?

The central research question that anchored this study investigated how mentor-mentee dyads established a partnership framework and negotiated agreements for their work together. This was most evident in the observation of the partnership agreement conversation, but it was also executed through mentor-mentee co-planning conversations.
Research Question One: In what ways do co-planning conversations serve as professional development for mentor teachers and yearlong residents?

The first research question highlighted what mentors and mentees learn from each other. The data for this question was mined from observations of co-planning conversations and one-on-one interviews.

Research Question Two: How does the mentor-mentee relationship develop through co-planning?

This second research question focused on how mentors and mentees work to develop a mutually beneficial mentoring relationship. The data for this question was collected and triangulated through observations of the partnership agreement conversations, co-planning conversations, journal excerpts, and one-on-one interviews.

Research Question Three: In what ways are cogenerative dialogues incorporated in co-planning conversations at the beginning of a yearlong residency?

The last research question concentrated on ways cogenerative dialogues, if any, existed within co-planning conversations at the beginning of the year. The data for this question was obtained from the dialogue within the co-planning conversations.

Findings

Merriam (2009) purported that the goal of data analysis is to find answers to research questions. After merging common categories to develop themes, the themes were then compared against the research questions to ensure that each research question was addressed. The multiple pieces of data collected throughout this research addressed each research question. To illustrate, the data from the co-planning conversations addressed the central research question and all three sub questions, whereas data from the partnership agreement conversations only addressed the
central research question and sub question two. Three themes emerged from the data analysis: *candid collaboration, dispositional capacities, and ongoing work*. Table 6 is an exhibit of how for the first theme of *candid collaboration*, the codes were grouped into categories, and how the categories were reduced to a theme. In phase two coding, special attention was taken to look at low incidence codes and how they could be collapsed to the point of saturation. For example, open communication initially had 24 code instances. Through phase two coding, low incidence codes such as receptive to feedback (6), domain-based feedback (3), mentor feedback journal (2), mentee as listener (2), shared language (2), morning debriefs (2), conversations about student writing (1), conversations about student behavior (1), and feedback on lesson plans (1) were all collapsed into open communication (41). Mentor suggestions (25), albeit a direct form of communication, were also collapsed with open communication for a total of 66 code instances.

Table 6: Codes, Code Instances, and Categories for Theme One: Candid Collaboration.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Code Category</th>
<th>Code and Codes Instances</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Candid Collaboration</strong></td>
<td>Communication Strategies</td>
<td>Mentor implicit knowledge made explicit to candidate (101) Open communication (66) Mentor positive reinforcement (25) Resident clarifying questions (14) Procedures (7)</td>
</tr>
<tr>
<td></td>
<td>Workload Responsibilities</td>
<td>Assigning responsibilities (21) Co-planning (21) Required preparation (21) Determining responsibilities (6)</td>
</tr>
<tr>
<td></td>
<td>Lesson Design Elements</td>
<td>Brainstorming lesson design for P-12 student learning (70) Backwards design (14) Recall previous lessons (mentor) (12)</td>
</tr>
</tbody>
</table>

**Theme 1: Candid Collaboration**

The components of the theme *candid collaboration* were grouped into three code categories: communication strategies, workload responsibilities, and lesson design elements. The
code with the highest frequency was situated within the communication strategies category and was: mentor implicit knowledge made explicit to candidate, which had 101 code instances.

**Communication Strategies**

As mentor-mentee dyads were observed having their first co-planning conversation at week three and their second co-planning conversations at week five, having the mentor explain parts of the lessons while also making their implicit knowledge explicit was a crucial communication strategy across all co-planning conversations. In their second co-planning conversation Ms. Susan and Jane discussed a lesson where the focus was determining the meaning of words. Throughout the co-planning conversation, Ms. Susan explained different parts of the lesson’s delivery and how to connect different parts of the lesson for the students:

So what is an unknown word? So in guided reading and independent reading, they have to identify those unknown words and then what’s happening in the text. That’s where you can connect it to what they do, what they say, and you would mark that down here. And are there any clues in the text before or after? What does the word mean?

Then, Ms. Susan continued to make her implicit knowledge explicit for lesson delivery surrounding context clues by directly stating the importance of breaking down context clues with students when she said:

Even though it’s kind of obvious, you want them to go through [the process] because they can’t jump from before and after and does it make sense. Does what make sense? And then does the definition make sense in the story?

Ms. Susan emphasized that while some parts of the lesson may be obvious to the teacher as an adult, it is important to consider the cognitive abilities of students. During Jane’s interview, she spoke with great emphasis about how gaining implicit knowledge from Ms. Susan was helpful since it provided a “more in depth side of how to plan a lesson,” and it fostered a thought process that she would not have ascertained on her own. By having these co-planning
conversations, Jane was able to attune her thought process on where and how to provoke student thinking and where to check for student understanding.

Similarly, in Ms. Elizabeth’s first co-planning conversation with Morgan, she also explained how she delivered the lesson at hand in the past, which frequently appeared as a useful discussion technique in all of the co-planning conversations since all mentors had previous experience with their curriculums. As a result, mentors were able to share what parts of the lesson worked best for them. Ms. Elizabeth explained a lesson on the northeast and southeast regions to Jane as she would explain the lesson to her students.

Before we even look at the sources, the first day I have physical features, natural resources, economics, and population. I have a picture for each and talk about what we’re going to be learning if I’m showing you these four different pictures.

Ms. Elizabeth takes her explanations a step further by making implicit knowledge explicit when she says:

So we talk about physical features like we’re going to learn about the land forms because sometimes the physical features when they see that word on the test for the physical map it throws them off. I do try to review that. Even like natural resources. They know what it is, but when they see it written out and it’s not like the different resources you can get from the land, that tricks them up too. Economics and population are words they can get tricked up on. Population map. Some of them don’t know what population means so they don’t know how to read the map. So, I do review these four words for them and that can be words we can add to the word wall.

The distinction of vocabulary words is something that may not register with resident teachers who are trying to synthesize multiple parts of the lesson, but mentors have the opportunity to discuss this by making implicit knowledge explicit. Ms. Elizabeth described the importance of finding a balance as to not overwhelm her resident teacher while also exposing her to the reality of the ultimate goals for students and keeping everything in line with state standards and objectives each day. To make Morgan’s learning relevant as a novice co-planner, Ms. Elizabeth discussed “little activities” and how they relate to the big idea of the unit. This became
evident in their second co-planning conversation where the objective for the day was for students to label physical features on a map. Morgan mentioned wanting to get students to label one or two states in each region, but Ms. Elizabeth suggested focusing on the objective and to avoid getting students fixated on labeling two states. Morgan commented during her interview that starting co-planning by having her mentor walk her through lessons was “eye opening,” especially as it relates to details that resident teachers often take for granted such as students’ perceptions of vocabulary. “You might think one thing and then your mentor teacher says another, and you start thinking about it that way,” Morgan explained. While making implicit knowledge explicit and mentor suggestions were important during co-planning conversations, mentors and mentees also engaged with reciprocal dialogue through feedback from having open communication.

Open communication helped mentors and mentees find stability and focus as instruction progressed throughout the day. Ms. Crystal provided feedback in a journal, and when her resident teacher, Amber, got to a stopping point with guided practice, independent practice, or whenever they had a free moment, the mentor and mentee would have a quick conversation about areas in the lesson that required improvement. “She does improve it in her next lesson, whether it’s that morning if she’s teaching both classes or it’ll be later in the lesson, or even in the second class.” It is often during these on-the-spot conversations where mentees demonstrate their receptiveness to feedback, and Amber confirmed how these conversations can immediately impact students within their classes. “We might say, ‘Oh this didn’t work good for this group, so let’s change it up and do this for the next group that comes in,’” Amber explained. As resident teachers processed all of the feedback they received, the mentor teacher journal was a useful tool for documenting concrete feedback that could be referenced at a later time. The majority of
feedback from the mentor journals consisted of positive reinforcement that mirrored data from the co-planning conversations and interviews. For example, around the time of their second co-planning conversation, Ms. Crystal wrote in her mentor journal, “Very impressed that you adjusted the lesson knowing how it went in the first class and the demographics of the second class.” Within the same week, Amber also wrote in her journal, “My mentor teacher and I co-plan throughout the day and make changes as necessary. After we teach our first class, we can readjust how we taught it depending on what worked or didn’t work.” Ms. Crystal and Amber shared a high level of agreement between their co-planning conversations, interviews, and journals.

**Workload Responsibilities**

Candid collaboration also required mentors and mentees to discuss workload responsibilities. The notion of assigning responsibilities sounds counterintuitive to the collaborative processes fostered by co-planning, but during co-planning conversations within the first five weeks of the residency year, assigning responsibilities is sometimes necessary as mentors work to build mentee confidence. Ms. Destiny pointed out that co-planning conversations at the beginning of the yearlong residency are crucial in order for her to ensure that her mentee is getting everything she needs to execute a successful lesson. Without co-planning and discussing specific, assigned parts of the lesson, Ms. Destiny commented, “I just feel like I would not be giving her the tools for success.” She added that lesson plans may look good on paper, but it is important to verbalize how to execute it in real life. This was evident in an excerpt from Heather’s second co-planning conversation with Ms. Destiny when Ms. Destiny said:

> You’re going to show the weather channel’s forecast of the day, you’re going to talk about all of the things you did the day before, and then on day two they’re going to write a descriptive paragraph about their drawing. So, what I want you to do as guided practice is you’re going to model that writing, ok?
While Heather was slated to teach this entire introductory lesson that focused on weather and climate, Ms. Destiny’s direct request for modeling writing during guided practice exemplifies how responsibilities are assigned during early co-planning conversations. Heather said, “It was more of just like her giving me the lesson plans and like telling me what to do because I didn’t know what I was doing.” During Ms. Destiny’s one-on-one interview, she complimented the rate at which Heather was adapting to being in front of the class. By the time Heather had her one-on-one interview, she mentioned their conversations changed to a more collaborative nature. During her interview, Heather said, “Now, I feel much more confident with what I’m doing, but now it’s just like we understand each other.” With confidence and an understanding of what works for students, co-planning became a more seamless conversation for Ms. Destiny and Heather.

Determining responsibilities also creates a natural segue for mentors to gradually release responsibility to their mentees and thus growing their competence over variances of time. The distinction between assigning responsibilities and determining responsibilities is the collaborative decision-making that involves the resident when determining responsibilities. Ms. Elizabeth and Morgan collaboratively determined responsibilities in their first co-planning conversation when they identified activities that would be engaging for students and manageable for Morgan as the novice teacher. Ms. Morgan said, “When we look at the physical features that’s when we get to draw on the map, so I don’t know if that’s something you want to do. You can draw on the board and they draw on the map too.” Determining responsibilities is part of the give and take relationship mentors and mentees develop as they prepare for P-12 student learning.
Lesson Design Elements

Brainstorming lesson design for P-12 student learning (70) was the most prevalent code for the lesson design elements category. Only two out of the four mentor-mentee dyads brainstormed lesson design, while the other two dyads relied on the mentor making implicit knowledge explicit. Given this data, it is important to consider how the frequency and nuances of these brainstorming conversations served as professional development at the beginning of the yearlong residency. For Ms. Crystal and Amber’s second co-planning conversations, they were working with Louisiana’s ELA Guidebooks Curriculum. Ms. Crystal initiated a conversation that required them to look carefully at the curriculum and determine what would work best for their students using student prior knowledge and by monitoring student work. This act of brainstorming was one of the driving parts of their second co-planning conversation where each participant actively contributed dialogue about the lesson. The focus of this lesson was preparing to use similes and metaphors in a personal narrative.

Ms. Crystal: They have to finish the simile or metaphor and then what is it comparing and what does it mean? So I still feel like we should do the most..

Amber: Yea, maybe do 5, 6, 7 as a group again since it’s a little different than that first part. Then, they can do 8, 9, and 10 on their own.

Ms. Crystal: Well you see this one is a little different. It’s giving what is being compared. So now I know the cheese is on top of the pizza and

Amber: So do 10 too together


Amber: It’s also a time issue too. To go faster together too. But you still need to see what they can do.

Ms. Crystal: So you thinking 5, 6, 7 as a unit all of us together and then 8 and 9

Amber: I think so.
Ms. Crystal: Ok. (makes notes on plan) 8 and 9 independently.

Amber: 10 as a group. 11 you want to independently or as a group?

Ms. Crystal: I think we can do it independently, but they’ll probably… We’ll just make a decision
Amber: Depending on how they’re doing.

As Ms. Crystal and Amber planned for this part of the lesson, they equally contributed to the discussion. The act of brainstorming provided an avenue for them to work collaboratively as mentor and mentee, and it was the act of brainstorming that instilled confidence for the mentee as they had critical conversations about the curriculum. In her interview, Ashley noted that it was difficult to teach the curriculum with fidelity as expected from the school site. However, the co-planning process helped her to focus on what was most important since many of the Guidebook lessons exceeded the time limit provided for a normal class period.

Since the 2020-2021 school year was filled with COVID-19 restrictions, many teachers also saw this reflected in their lessons with some examples including a loss of partner talk or group work. However, at the start of the 2021-2022 school year with the onset of this research, many teachers were optimistic to resurrect some of their more engaging instructional practices that were part of daily routines before COVID-19. This naturally led to opportunities for some mentors and mentees to brainstorm and get creative. Ms. Elizabeth said:

We are getting back to doing some more hands-on things, so I feel like Morgan’s really helping me with that lesson planning part. It’s not just like this tried and true lesson where I don’t need to edit anything. Um, I do want to add things, so I feel like she’s more willing to make suggestions because I’m asking her and telling her we need to change it.

The act of making suggestions was evident in the second co-planning conversation between Ms. Elizabeth and Morgan when they brainstormed how to incorporate more student discussion:
Ms. Elizabeth: The second part where they put the explanation they can possibly partner up and do it with a partner. You wanna try that? We can try that.

Morgan: Yea, we could do umm or could we like assign or maybe do like 3 people or maybe even partners… assign them a natural resources and they do that one and share it.

Ms. Elizabeth: And they just do that one. Oooo that sounds good. Plus partner work. Group work. We can do… It depends on how many natural resources. If it’s like seven natural resources that’s easy and we can split up the class, but if it’s only four then it will be big groups (both writing on plans). I like that.

To engage with collaborative brainstorming discussions, it was important for mentors and mentees to possess the necessary dispositional capacities found in the second theme of this research. Table 7 exhibits how for the second theme of dispositional capacities the codes were grouped into categories, and how the categories were labeled as themes. Phase two coding resulted in the saturation of low incidence codes such as resident advocating for modeling and feedback (3) and begin taking on co-planning lead (1) into residents taking initiative (23).

Table 7: Codes, Code Instances, and Categories for Theme Two: Dispositional Capacities.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Code Category</th>
<th>Codes and Code Instances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispositional Capacities</td>
<td>Trust</td>
<td>Supportive mentor-mentee relationship (65)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resident autonomy (26)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Co-planning is essential (17)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Confidentiality (10)</td>
</tr>
<tr>
<td></td>
<td>Pushing Boundaries</td>
<td>Residents taking initiative (23)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Classroom management (8)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data to drive instruction (6)</td>
</tr>
</tbody>
</table>

Theme 2: Dispositional Capacities

The second major theme, dispositional capacities, was grouped into two code categories, trust and pushing boundaries. Codes with the highest frequency were situated within the trust category.

Trust

By seeking resident input and encouraging resident autonomy, mentors foster a supportive mentor-mentee relationship that requires trust. In her interview, Ms. Destiny said she
always strives to make sure that her mentees feel comfortable asking tough questions and speaking up when they do not know something. She said, “A very good rapport with your resident is essential, because if you don’t have a good rapport, they will not take everything that you say as constructive criticism.” Heather commented that she does feel supported by her mentor. “She like gives me the confidence because she really helps me walk through everything. She boosts up my confidence. I never question my education or residency with her, because I know I’ll be fine.” Resident participation and confidence are engendered by the mentor’s outlook since Heather also mentioned that without her mentor’s support, she would feel as if she was getting everything wrong.

Ms. Susan mentioned her work with a previous resident where a lack of engagement on the resident’s behalf created a lack of trust in their mentoring relationship. This previous resident lacked taking initiative, which led to co-planning conversations that were lackluster, and the resident struggled to gain confidence in front of the class. Ms. Susan said, “In order for you to build that toolbox and build that confidence, you really need to stay engaged.” Ms. Susan went on to say that this requires being involved in the lesson in some way, which begins by establishing relationships with students, monitoring classroom management, and helping with student work. In her work with her current resident, Jane, Ms. Susan discussed the benefits of planning every day for different parts of the lesson.

I would like to believe that constantly planning those things out has helped our relationship and has helped me to feel more comfortable. I feel like she trusts me and is comfortable to ask me, maybe even uncomfortable questions. She’s okay with saying I don’t know how to do that.

Jane agreed that having a positive, professional relationship with her mentor was important for asking questions and receiving honest feedback about how she can improve. Jane said, “Being able to have different opinions in a co-planning setting is okay and being able to
make different realizations and suggestions is important.” Ms. Susan said with a positive working relationship, they are able to embrace mistakes. “And I have modeled to her that you’re going to make mistakes in the classroom and so she is comfortable with if we make a mistake, we just fix it.” As mentors and mentees develop collegiality, they are able to embark upon ambitious co-planning conversations where the exchange of ideas is requisite practice.

All co-planning conversations at the beginning of the yearlong residency for this research included lesson plans created by the mentor teacher. Across all co-planning conversations, mentors provided residents with autonomy to add or modify their existing lesson plans. For instance, in their second co-planning conversation, Ms. Destiny told Heather, “But I want you to know at any time that this is just my lesson plan. You can tweak it, edit it, add your own activities to it. Just stick with the performance expectation.” Discussing her process for co-planning with previously created lessons, Ms. Destiny said:

So what I do is I pull out my lesson plans that I have already created and any flip charts that I may have with it, right? We just go through the lesson plan together, but I’ll always give her the autonomy to change whatever she needs to change to make it her own. Heather corroborated this when she said, “She has all the materials like she has all the handouts, she has all the PowerPoints. She provides all this stuff and I pick and choose what works.” During her interview, Heather discussed upcoming science lessons. While Ms. Destiny sent her eight attachments of varying PowerPoints and handouts, she said she narrowed it down to two. Not only did this get Heather involved in the initial co-planning process, but it also fostered trust in the mentor-mentee relationship when they came back together to discuss what was selected.

Resident autonomy was also achieved through brainstorming lesson design when mentors provided residents with the autonomy to make instructional decisions for the lesson. Ms. Elizabeth said during their second co-planning conversation, “So this is what we did last year.
Maybe I can explain it to you and then we can see if you want to change anything or if we want to change anything.” In this instance, Morgan did not want to make any changes to the lesson, but at the early stages of co-planning, it is significant to note that the opportunity was provided for the mentee to provide input. The second code category is discussed next.

**Pushing Boundaries**

Another code category for dispositional capacities is pushing boundaries. In every partnership agreement conversation, mentors and mentees discussed the importance of residents taking initiative and taking risks throughout the residency. For a novice teacher entering a new school environment, this can be an overwhelming task. However, for Amber and Ms. Crystal, initiative was clear from both parties during their partnership agreement conversation. Unlike the other mentor-mentee dyads, Amber and Ms. Crystal each created their own version of the partnership agreement conversation, and when it was time to discuss, they were able to pull information from each of their documents to create one mutually agreed upon partnership agreement. Ms. Crystal addressed this as part of her partnership agreement conversation with Amber when she said, “I think this one is going to be hard for you. My expectation for you is to take risks. Don’t get too comfortable. Venture out. Try new things. You’ll never know what will motivate students, but also yourself.” Ms. Crystal encouraged this brazenness not only in her classroom and during their mentor-mentee co-planning conversations, but with other members of their content team as well. She encouraged Heather to be known and take risks when she said:

Collaborate not only with me but everybody on our team, whether it is the ELA or social studies team, or our fourth-grade team, but also administration. If you have something to say, say it. Don’t just sit back and let us tell you things. If you have a question or you think something would work during lessons, express that.

Amber demonstrated how approaching the partnership agreement with confidence and goals in mind helps to drive the mentoring relationship. In her version of the partnership
agreement, she wrote, “The mentor teacher will provide constructive feedback to the resident teacher. The resident teacher will adopt lessons using the constructive feedback. The mentor teacher will also model lessons in order to help the resident teacher in developing skills.” Ms. Crystal and Amber each possessed the dispositional capacity to push boundaries and expect more from each other through their mentoring relationship.

Specific to theme three, the majority of the data came from the one-on-one interviews. Table 8 exhibits how the codes for the third theme of ongoing work were grouped into categories, and how the categories were labeled as themes. Low incidence codes such as co-teaching issues (1), co-planning varies among schools (1), co-planning started as scheduling (1), accountability barriers (1), finding a place to co-plan (1), some content is easier to co-plan, and resident confusion (1) were collapsed into co-planning barriers (7).

Table 8: Codes, Code Instances, and Category for Theme Three: Ongoing Work.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Code Category</th>
<th>Code and Code Instances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing work</td>
<td>Prohibitive factors</td>
<td>Scheduling (12)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>First time co-planning (11)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Previous relationship complications (9)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lack of co-construction (10)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Co-planning barriers (7)</td>
</tr>
</tbody>
</table>

**Theme 3: Ongoing Work**

*Ongoing work*, theme three, was grouped into a single code category, prohibitive factors. Codes appear with a similar degree of frequency ranging from scheduling with 12 code instances to co-planning barriers with seven instances.

**Prohibitive Factors**

Teachers, both novice and experienced, have inundated schedules where every minute of their day is utilized by instruction, grading, PLCs, parent teacher conferences, and a myriad of expectations far too extensive for this list. There are federal laws that require attention to certain
tasks within a timely manner, and unfortunately, a teacher’s planning time is when most of this work gets completed. Co-planning between a mentor and resident teacher is important work, but this research has illuminated prohibitive factors as a category of the theme ongoing work. Scheduling, or the lack thereof, was the most predominant code for prohibitive factors. Amber said that during most of their planning times, there were mandatory meetings she had to attend with her mentor. She described some of those meetings as “structured planning times” where teachers were told what they should add to their lessons such as certain bell work questions. However, these structured conversations prevented Amber and her mentor from being able to discuss what worked or what they should change to their instruction for their students. When asked about their co-planning schedule, Ms. Crystal said they always found a way.

We’re very busy during planning, but there are some days where we can sit down and talk about it. Other days we may have to come, like we set a time to come before school and talk about it or we stay after school and talk about it. While mentors and mentees within this study are making the most of their limited co-planning time, it is because of their dispositional capacities and personal motivation. If there are mentors and mentees who do not embrace the importance of co-planning conversations, then much of their work and professional development would be left to happenstance. Without school districts and schools providing sacred time for co-planning conversations to occur, there is the risk that co-planning will not occur.

Jane said scheduling was one of their biggest obstacles when it came to having co-planning conversations:

Mondays and Tuesdays, Thursdays, and Fridays are usually our days to kind of sit down as partner teachers and PLC together. Very recently, a lot of that time has been cut short because we’re in a new schedule now, so it’s been a little bit more difficult to find that time to sit down during the school day to kind of plan those lessons.
Jane further explained that schedule changes fostered a mindset of flexibility and how she finds time to plan with her mentor. With Jane and her mentor both having busy after school schedules, co-planning was not something they worked on exclusively during planning time or after school, but rather co-planning took place throughout the day and was considered as part of their on-the-spot conversations with feedback. Jane also commented that having more time to co-plan would be beneficial. While Jane felt supported by her mentor, their hectic co-planning schedule forced Jane to plan a lot on her own.

**Summary**

In Chapter 4, I reported the findings from three themes that emerged from data analysis: *candid collaboration, dispositional capacities, and ongoing work*. For each theme, I discussed how the codes were grouped into categories and how the categories were reduced to a theme. The discussion was supported with evidence from study data: recorded conversations, interviews, and artifact analysis. Mentor implicit knowledge made explicit to candidate was the code with the most instances and was found within the first theme of *candid collaboration*. Chapter 5 consists of further discussion of findings and provides implications. Additionally, the next chapter contains potential future and extended research.
CHAPTER FIVE. DISCUSSION AND IMPLICATIONS

Yin (2018) identified the goal of case study research as to understand a contemporary phenomenon within a real-world context. The purpose of this case study was to investigate the phenomena of co-planning conversations at the beginning of a yearlong residency in order to better understand what aspects of mentor and mentee conversations help to expand their expertise and develop a mutually beneficial mentoring relationship. Through this study, I collected data from observations, one-on-one semi-structured interviews, and artifacts. Through data analysis, I identified three themes resulting of first and second cycle coding. The findings from data collection and analysis addressed the research questions. The results suggested that co-planning is beneficial to novice teacher development by way of mentors making their implicit knowledge explicit during co-planning conversations. Results also suggested that co-planning conversations required mentors and mentees to possess certain dispositional capacities as they engaged with candid collaboration. In this chapter, I present a discussion of findings, implications for practice, and recommendations for future research.

Discussion of Findings

The code with the highest incidence for the current study fell within the first theme of *candid collaboration*. Mentor implicit knowledge made explicit to candidate had 101 instances, and it revealed the most frequent form of communication between mentors and mentees during co-planning conversations. The emphasis on explicit communication from this study is similar to findings from Wexler (2020c) when mentors made instructional decisions visible during co-planning and debriefing sessions. In Wexler’s study, mentors did not take for granted that their mentees understood the rationale for instructional decisions. Similarly, within this study, mentors also recognized the importance of communicating ideas and strategies that are useful for
developing the pre-service teacher’s instructional repertoire. Additionally, brainstorming lesson design for P-12 student learning had 70 code instances, which was the second most recurring code for the current study. During the co-planning conversations, mentors and mentees also spent a significant amount of time brainstorming and collaborating on lesson design. This included conversations about how to make the learning personally relevant to students, lesson pacing, setting expectations, and relating learning to the objectives. Brainstorming happens to be one of the four cogenerative dialogues, which also includes managerial, reflective, and critical dialogues. Cogenerative dialogues, discussed in Chapter 2 and included as research question three, are used as a framework to organize how mentors and mentees communicate. Figure 3 identifies the most prominent codes that align with the four cogenerative dialogues. Through brainstorming, mentors were open to new ideas that mentees brought to their co-planning conversations, and they were able to unknowingly incorporate multiple cogenerative dialogues. Brainstorming with a mentee represents an openness to professional learning and disrupts the norms of the traditional mentor-mentee relationship. These findings match the claims of Goodwin et al. (2016) that mentors can expand their content and pedagogic knowledge. The theme of *candid collaboration* exemplifies what is possible when the student teaching/residency experience shifts from practices of replication and a greater emphasis is placed on collaboration (Braaten, 2019; Goodwin et al., 2016). Through collaboration, both mentors and mentees begin to experience professional growth.
The second theme of *dispositional capacities* revolved around the categories of trust and pushing boundaries. Supportive mentor-mentee relationships had 65 code instances, and it revealed the importance of mentors and mentees developing a relationship. Mentors played a significant role in creating supportive relationships by opening their classroom spaces and emphasizing the importance of learning and growing from each other. To build confidence, mentors provided residents with autonomy when planning for instruction. In order to provide autonomy, there also had to be collaboration, trust, and respect in the mentoring relationship. With those elements in place, findings from the current study were similar to findings from Russell and Russell (2011) in which mentors followed a gradual release model to build their mentee’s planning and teaching confidence. Mentors within this study did not expect mentees to replicate their practices since autonomy was given to adjust lessons and lesson materials either during the recorded co-planning sessions or during a time when they were assigned to think about the lesson more on their own. The co-planning conversations observed as part of this study
magnified how co-planning is part of a gradual building process. Dyads were instructed to record co-planning conversations during week three of the placement, which is when residents typically participate while the mentor teacher serves as the co-planning and instructional lead. The second co-planning conversation for this research occurred at week five, which is when residents were slated to assume the responsibility of leading one subject area or class period. Although residents assumed more instructional responsibility leading the class, all co-planning conversations at week five were heavily led by mentor teachers. The second co-planning conversations revealed that mentees did not assume more co-planning responsibility, regardless of assuming more responsibility for leading instruction. The second theme of dispositional capacities reveals not only the collegiality that forms through co-planning conversations, but it also reveals the processes required to develop a mutually beneficial mentoring relationship that utilizes co-planning.

The third theme of ongoing work revolved around the category of prohibitive factors and the most prevalent code of scheduling, which had 12 instances. As mentioned in Chapter 3, Pratt et al. (2017) described successful co-teaching partnerships as those who strategically and consciously set aside time for planning and reflecting in order to plan long-term and day-to-day goals for students. Co-planning requires a significant time commitment from both mentors and mentees. While each dyad identified a co-planning date and time as part of their partnership agreement, unexpected meetings or events at the school would sometimes consume their planning time. With interruptions to dedicated co-planning time, conversations about instruction are stifled due to an inability to find other available times for these conversations during the school day. When considering the outside commitments that mentors and mentees may have before and/or after school, dyads may have limited opportunities to make up these conversations.
Given the high incidence of codes for mentors making implicit knowledge for candidates in theme one, and the opportunities for developing and expanding professional boundaries discussed in theme two, priority should be given to co-planning time.

**Connections to the Theoretical Frameworks**

Co-planning conversations as part of the novelty of the yearlong residency experience is a fairly new phenomenon. While studies have examined the impacts of co-planning on mentor and novice learning either during or after the interactions have taken place, (Wexler, 2019; Wexler, 2020a; Wexler 2020b; Wexler, 2020c), this study sought to illuminate how co-teachers initiated this exchange at the beginning of their time working with each other. Each mentor-mentee dyad used a different approach for their partnership agreement and co-planning conversations. These varied approaches are representative of the tenets of situated learning theory and activity theory, which proclaims that learning occurs as part of an existing social community. Situated learning theory and activity theory were both challenged and confirmed as the frameworks worked in tandem to reveal the inter-workings of each mentoring relationship and how mentors and residents were provided the opportunity for growth. The central research question for this study was: How do mentors and resident teachers initiate the use of co-planning at the beginning of a yearlong residency? Observations, one-on-one semi-structured interviews, and artifacts provided evidence for connections to the theoretical frameworks.

**Situated Learning Theory**

One of the principles of situated learning theory is legitimate peripheral participation, which is when “newcomers” engage with “old-timers” as they navigate ways of belonging within the existing social community of the school (Lave & Wegner, 1991). The results of this research illuminated the tenets of situated learning theory since newcomers, or yearlong resident teachers,
received approval to engage with the existing social culture of their schools. More importantly, the trust that was developed as part of the mentoring relationship enabled mentors to empower their yearlong resident teachers during co-planning lessons. The tenets of legitimate peripheral participation were challenged through co-planning conversations since the newcomers did not only exist within the mold of the school’s situated perspective, but they were also fully immersed by contributing to the social community through co-planning with their mentors. Peripherality was facilitated and enabled as mentors and mentees engaged in collaborative co-planning conversations, which was made possible by the development of their mentoring relationship. The particulars of their mentoring relationships were discussed as part of the partnership agreement conversations and observed in practice during co-planning conversations. Although this research was unable to capture the dynamics of conversations where residents served as the lead facilitators of co-planning conversations, it is important to note that peripherality existed and the newcomers (residents) were able to grow and expand their involvement through co-planning. When asked about leading co-planning conversations later on in the year, all mentor-mentee dyads agreed that the residents would be equipped to lead co-planning conversations as the semester progressed. The growth toward leading co-planning conversations is best described by peripherality.

**Activity Theory**

Engestrom (2001) identified activities as open, goal-oriented systems that are made up of collective communities of viewpoints, traditions, and interests whereby a division of labor exists. As mentors and mentees engaged with co-planning conversations, it was important for them to work through differing viewpoints and address the division of labor that inevitably exists between the experienced and novice professional. Mentors and mentees shared a collective
interest in their co-planning conversations as they focused on meeting student needs. As mentors made their implicit knowledge explicit to their mentees, they were simultaneously building mentee confidence that would lead to the mentee’s ability to independently plan and deliver a lesson further along in the residency. The tenets of activity theory were confirmed through this research since co-planning conversations allowed mentor-mentee dyads to experience expansive transformation as they began to question and deviate from the established norms of the activity system. While the frequency of how they deviated from the established instructional strategies of previously taught lessons varied by dyads, each dyad shared significant discussion that pushed the boundaries of how mentors, and more abundantly, how mentees viewed lesson design and pupil achievement through the co-planning process. In essence, mentees were not forced into a mold, but instead, they were able to utilize their abilities as a novice teacher. Mentors within this research encouraged their mentees to voice their opinions and perspectives regarding instructional decisions, and mentors provided them with autonomy to make lessons their own through mentee decision-making. As discussed in Chapter 4, mentee, Jane, commented that a difference in opinions is important to making realizations and offering suggestions. While the division of labor persisted early on in the residency experience, it is critical that the dyads began the process of negotiating their viewpoints and traditions during co-planning conversations, and that mentors increasingly released decision-making to mentees.

**Implications for Practice**

This research illuminated several implications for practices related to co-planning conversations. The implications are viewed as sources of impact for the local, regional context and as part of the larger, national discussion involved with the increase in education residency programs.
Co-planning Calendar

Co-planning is meant to be a collaborative process where two or more teachers engage with conversations about the lesson, and for some mentors and mentees, this can be a new skill. Co-planning at the beginning of the yearlong residency, for both mentors and residents, was synchronous with learning to collaborate (Smith, 2005). Residents and their mentors created a dynamic environment where professional learning was encouraged, but residents were not ready to lead co-planning conversations when the observations concluded at week five. Although co-planning conversations at week five were led by mentor teachers, the conversations were still valuable as there were many instances where mentors made their implicit knowledge explicit for the candidates. In addition, mentors were able to provide residents with autonomy while also continually building mentee confidence as they negotiated various lesson design elements.

The co-planning/co-teaching calendar found in Appendix E provided a tentative timeline that dyads could use to outline their work for the semester. As stated in Chapter 3 and in alignment with the co-planning/co-teaching calendar, the first co-planning observations occurred during week three of the placement when the resident participated in co-planning sessions, but their mentor teacher still served as the instructional lead. The second round of co-planning observations took place during week five of the placement when residents were slated to assume the responsibility of leading one subject area or class period (Appendix E). With residents assuming more instructional responsibilities at week five, it would benefit residents to serve as the lead facilitator for those conversations. Research cited by Thompson et al. (2015) in Chapter 2 discussed how pre-service teachers were excluded from the planning process during the first six weeks of the school year. This exclusionary practice resulted in co-planning conversations that were stagnant, and it presented difficulties when pre-service teachers implemented lessons
they did not design. While residents in this study were not excluded from co-planning conversations, future practice should target residents leading and taking ownership of co-planning conversations for lessons where they serve as the instructional lead. To encourage residents to lead co-planning conversations, implications for future research regarding the timeframes of the co-planning/co-teaching calendar is discussed further in this chapter.

**Uninterrupted Co-planning Time**

To establish a viable, productive working relationship, mentors and mentees require a dedicated schedule where they have uninterrupted time for co-planning conversations. Thompson et al. (2015) and Pratt (2017) described successful mentor-mentee relationships as those who developed routine times for planning and reflecting on teaching. However, given the added responsibilities that teachers assume when mentoring in a yearlong configuration, especially with COVID-19 staffing issues, it can be challenging for dyads to adhere to their co-planning time commitments. Given the significance that mentoring plays in enculturing new teachers to the profession, school districts and school leadership teams should consider how the configuration of their schedules accommodates the necessary supports required for teachers to engage with co-planning. Currently, there is the assumption that co-planning takes place as part of mentoring initiatives. However, the terms mentoring and co-planning are vague, which leaves room for interpretation by school districts, schools, and individual mentors. It is imperative that preparation programs begin to have conversations with school districts about the value of co-planning as professional development for novice and experienced teachers.

In Louisiana, House Bill No. 75 was proposed for the 2022 legislative session, which would require public school governing authorities to post instructional materials and activities on its website by the first day of the school year and provide any necessary updates by January 15th.
of each school year. The bill defines activities as a lecture, assembly, presentation or other event used for student instruction (House Bill No. 75, 2022). The tenets of the bill are counterintuitive to the generative processes that are essential to planning and co-planning conversations. Co-planning requires the use of backwards design and data to inform instruction, and in a state where many school districts already follow scripted or guided curricula, the motives of such a bill have been called into question by teachers across Louisiana. With proposals such as House Bill No. 75, there are presumptions about the planning process that do not match the autonomy teachers need to lead their classrooms and that mentors need to empower their mentees through co-planning. To help co-planning and mentoring become requisite practice, policymakers and school district leaders should investigate providing mentoring dyads with guaranteed, uninterrupted co-planning time several times per week.

**Mentor Criteria Policy Revisions**

The current study included two mentors who met the state’s requirements for completing a mentor teacher program, one mentor who was working on the assessments while the research was ongoing, and one mentor who did not complete a mentoring program, but who met the state’s mentor waiver requirements for having a master’s degree. Placing mentees with mentors required an exhaustive process of meeting minimum qualifications. Ms. Susan, the mentor who did not go through the mentor training program, was just as adept as the other mentors who completed or were a part of mentor training during the study. If the mentor waivers were not in place, Ms. Susan’s skills as a mentor would have gone unutilized. Current practice and future practice are greatly hindered by the consideration of minimum qualifications such as VAM, years of experience, or participation in a mentoring program, which do not consider the relevancy of a mentor’s ability (Matsko et al., 2020). The current research results aligned closely
with the findings of Matsko et al. (2020) that suggested mentors should be selected based on their experience coaching other teachers. As stated in Chapter 2, the matching and selection process for a yearlong residency is of dire importance. Teacher residency programs require mentors to spend more time throughout the school year with their residents, and this endows mentors with significant influence, whether positive or negative, on pre-service teacher development (Goodwin et al., 2016). Given what is known about detrimental practices from research on the traditional student teaching model, it is important to consider how the yearlong residency has the potential to exacerbate personality conflicts to the point of detrimental practices and relationships. Not only is research regarding matching and selecting practices important for the success of working relationships, but it is also important for the longevity of a yearlong residency where co-planning is emphasized as requisite practice.

**Time and Expectations at the Residency Site**

In consideration of the increase in yearlong residencies as brought about by legislative initiatives in several states, the results of this research are both timely and informative. Implementing a yearlong teacher residency constitutes many nuances that are interpreted differently by individual states and preparation programs. For example, as discussed in Chapter 2, Louisiana policy requires candidates in their first semester of residency to spend at least 60 percent or 80 percent of each school week engaged at the school site. During the second semester of residency, all teacher candidates, regardless of concentration, are expected to spend a minimum of 80 percent each week engaged at the school site, while concurrently enrolled in coursework at the university (LDOE, 2021). Within the guidance that preparation providers receive, there is also the option to seek approval for an innovative residency model that deviates from the minimum time spent at a school site each week during residency. In Texas, the teacher
residency policy requires that teacher candidates are with an experienced, highly effective mentor for a minimum of three days per week for a full year (Texas Education Agency, 2021). Given the variety of schedules across different states and how this can impact practice, there is a need for greater research discussions at the national level about effective and ineffective practices from different residency models. While residency policies within states such as Louisiana and Texas are specific in terms of the number of hours or days candidates must spend at their residency site, there is a lack of specificity surrounding practices that are most meaningful for novice teacher development during the yearlong residency.

With the yearlong residency model, mentees are being encultured to specific contents for prolonged periods of time if they are within a departmentalized classroom. A wider discussion on how preparation programs constitute time within various content areas is important to the implementation of yearlong residencies and how experience within other classrooms is negotiated for mentees. As the notion of the yearlong residency gains traction, it is important to focus the discussion on how states and preparation providers are implementing residency programs in order to develop a set of practices that are beneficial to mentors, mentees, and P-12 students. If elementary residents spend an entire year planning and teaching ELA with little experience in math, then preparation providers and school districts perpetuate teacher attrition rates when new elementary teachers are unprepared for their work with multiple content areas.

Mining preliminary data from the preparation program’s first three cohorts of residents, there is a trend among residents who expressed burnout from being enrolled in coursework while also spending the majority of their week at their residency school site. To abate this burnout resulting in teacher candidates leaving the profession before they enter the workforce, it is critical for preparation programs to refine their practices both internally and externally. To begin,
programs can strengthen partnerships with school districts and clarify language in MOUs that explicitly state expectations for residents and mentors participating in a yearlong residency. Equally as important, it is imperative for preparation programs to engage with curriculum mapping and the redesign of courses that are paired with residency so that candidates are engaged with meaningful coursework that aligns and enriches their experiences in the residency classroom. Co-planning should become part of coursework so that residents do not experience this dialogue for the first time at their placement site, and in turn, they will be better prepared to have collaborative conversations with their mentors. If residency programs are implemented without a critical redesign of courses that are paired with residency, future teachers will experience burnout earlier than necessary.

Given the findings of the present study, recommendations for future studies within this area are provided. Seven possible research avenues are discussed.

**Recommendations for Future Research**

The findings from this study revealed critical information about the onset and implementation of co-planning conversations at the beginning of the yearlong residency. While findings contributed to the body of knowledge regarding co-planning conversations, several significant ideas regarding future extension and/or replication studies are provided.

**Recommendation 1: Exploring ongoing conversations**

In this study, data was collected on co-planning conversations where mentor-mentee dyads strategically met to co-plan for lessons. However, a significant finding from this study was that co-planning can occur without boundaries when it is regarded as an established practice of continuous conversation whereby mentors and mentees are able to communicate during lessons. As an example, Amber commented how she considered co-planning to also be part of
conversations between classes when she and her mentor discussed ways to improve the lesson for the next class. A duplication of this study at the same point in the school year that also observed on-the-spot, or what I term informal, convenient conversations during implemented lessons and throughout the day would provide stronger evidence of the communication methods between mentors and mentees. The co-planning conversations for this study were recorded at weeks three and five at the beginning of the school year. The timeframe for recordings precluded the conversations during weeks one two, four, and beyond week five. Future research can examine co-planning conversations using a more consistent, weekly recording schedule that will allow for greater investigation into the nuances of co-planning conversations at the beginning of the yearlong residency.

**Recommendation 2: Exploring how responsibilities shift**

Additionally, while the co-planning conversations at the beginning of this yearlong residency were often mentor-heavy, future research could investigate how the mentees’ contribution to the conversations shift and expand with an extended timeline. Amber described the onset of co-planning conversations as “getting your feet wet.” As time progressed with the residency, Amber, along with the other residents, predicted they would take on more co-planning lead responsibilities while their mentors would take on more of an observational role to ensure their lessons were instructionally sound. By recording on-the-spot conversations or informal convenient exchanges, there are also greater opportunities to observe how co-planning influences what happens next, which is teaching. Whether it is the observation of co-teaching or the mentee serving as the instructional lead, observing instruction has the potential to provide greater evidence of the nuances that allow co-planning to function. Both co-planning and co-teaching allows mentors and mentees to mutually engage, which destabilizes the traditional practice of
teachers working in silos. Co-planning conversations can set the precedent for the type of collaboration that is not only expected during pre-service teacher development, but that is also valued as teachers progress through their careers.

**Recommendation 3: Exploring multiple concentration areas**

Future research could explore co-planning conversations at the beginning of the yearlong residency across multiple concentration areas in secondary education programs. Considering the research by Smith and Nadelson (2016) where stark differences were found between the mentoring conceptions of elementary teachers who were more instructionally focused and secondary teachers who were more content-focused, the data collected from a more robust, holistic set of grade levels and content areas could yield different outcomes. As an example, mentor implicit knowledge made explicit to candidate had 101 code instances within this research. Making implicit knowledge explicit involved the elementary mentors discussing their rationale and explaining the logistics for certain instructional decisions. By also investigating secondary education programs as part of future research, the co-planning conversations of secondary mentor-mentee dyads could highlight the alignment or discrepancies between mentors making implicit knowledge explicit in elementary and secondary grades. This study focused on mentor-mentee dyads from kindergarten through fifth grade, primarily because of the element of convenience. The preparation program used as part of this research typically hosts a robust group of elementary candidates each semester. However, in the past two semesters, the program has experienced an increase in secondary social studies candidates. The secondary social studies candidates, along with candidates from other secondary concentration areas, have the potential to highlight the differences between dyad interactions based on students’ age and need.
**Recommendation 4: Studies in multiple settings**

In addition, studies patterned after the current study should also be conducted in various configurations, for instance, a study conducted in an urban setting or settings would add great value to teaching in urban environments. Given the unique challenges presented in urban settings, studies that investigate co-planning conversation in urban environs is warranted. For example, Ms. Crystal commented that mentoring someone at her school was particularly important to her since many novice teachers are intimidated by schools with academic and behavioral challenges. However, she feels novice teachers can be successful in such an environment when they have a supportive mentor. She said, “I feel like if you can succeed and do well at my school, you can teach anywhere.” Similarly, studies could also be conducted in rural areas and rural schools and school systems, given the distinctive challenges that teaching presents in rural areas. In tandem, studies should also be conducted exclusively in suburban settings since yearlong residency implementation is a statewide initiative in Louisiana that is not exclusive to urban or suburban environs. Given the LDOE’s emphasis on residency placements at high-need schools with higher percentages of minority or economically disadvantaged students and schools that are not geographically proximate to teacher preparation providers, future research in rural and urban settings can illuminate the nuances of co-planning in the areas where teacher preparation providers have focused their attention for placements.

**Recommendation 5: Studies with a multitude of participants**

Additionally, studies that are more expansive in nature should also be considered. A limitation of the present study was the small number of participants. Large scale studies that include a multitude of participants should be considered. This type of study could generate useful findings for larger districts, specific geographical areas or, perhaps, entire states and regions.
This can be accomplished by conducting a case study with an entire cohort of mentees within a preparation provider program. While the preparation provider for this research has 13 MOUs articulated with various school districts, the majority of residency placements (37 out of 53) occur within the two largest school districts centrally located to the provider. With this data in mind, comparisons about the values of mentoring and various mentoring approaches within each district could inform necessary revisions to strengthen MOUs and can impact residency practices as a whole.

Recommendation 6: Studies with multiple preparation programs

Studies that explore regional preparation program’s mentor-mentee relationships and co-planning configurations, as well as R1 teacher preparation programs should be undertaken. Such studies could be generated singularly, for example with a regional institution, or studies could be crafted within larger, research intensive intuition’s teacher preparation programs. Additionally, cross cases of the differences between regional and large university preparation programs could also be conducted. As described in the implications for practice, preparation programs are able to independently configure the requirements for their residency programs within the suggested parameters of legislative policy. A study that examines the different configurations relevant to time spent at the school site, coursework paired with residency, co-planning/co-teaching requirements, and mentor-mentee pairings would greatly inform the early implementation of teacher residency programs.

Recommendation 7: Longitudinal studies

Finally, longitudinal studies are warranted. It would be fascinating to follow a mentee across his/her first five years. A concern in the literature about co-planning is whether teacher candidates will be able to plan instruction once they are independent within their own classrooms.
(Chu, 2019; Guise et al., 2016; Murphy et al., 2015). However, after a yearlong experience with a gradual release of co-planning experiences and with communication strategies such as the mentor making implicit knowledge explicit to candidates, there is also the argument that candidates will be better equipped with a variety of strategies and scenarios that they can rely on from their residency experience. For example, Morgan stated in her one-on-one interview that she knows her mentor will be available for conversations during her first year, but she intends to find her independence and use the skills she garnered from co-planning conversations as she plans instruction on her own.

As part of a future longitudinal study, investigations into the types of mentoring support new teachers receive during their first five years could indicate whether the mentoring received during a yearlong residency continues or if new teachers become part of a sink or swim environment. Given that the current criteria to become a mentor includes three years of teaching experience, it would also be valuable to study a mentee who becomes a mentor to gain insight into the shifting of both perspectives and practices of co-planning conversations across time.

**Summary**

In Chapter 5, I discussed the findings. This chapter connected the discussion to the theoretical frameworks of situated learning theory and activity theory and how those theories acted in tandem rather than in juxtaposition of each other. Additionally, I discussed implications for practice that include revisions to the co-planning calendar used within this study, advocacy for uninterrupted co-planning time, revisions to the policy for mentor teacher credentials, and redefining the time and expectations for residency candidates at their school sites. Seven recommendations for future research were also discussed that include expansion and/or replication studies.
Conclusion

Overarchingly, the purpose of this study was to examine co-planning conversations at the beginning of a yearlong residency and how those conversations influence the development of a mutually beneficial mentoring relationship while expanding the expertise of the experienced and novice teacher. In this study, co-planning served as an opportunity for collaborative conversations. The findings suggested that co-planning conversations provided mentors with an avenue to make their implicit knowledge explicit to residents. For co-planning to function, the findings also suggested that it was important for mentors and mentees to possess certain dispositional capacities.

This research contributed to the fields of educational leadership and the mentoring practices incorporated as part of adult learning. The results and findings of this case study can inform preparation program faculty members, school district leaders, policymakers, and most importantly, mentors and mentees, about the importance of co-planning for resident teachers as they reach their final stages of preparation and ultimately enter the profession.
APPENDIX A. MENTOR TEACHER INTERVIEW PROTOCOL

Researcher: Thank you for agreeing to talk to me about your experiences with co-planning. I know your time is valuable, and I appreciate you fitting me into your schedule. I’m going to ask you a few questions about being a mentor, but my hope is that we can have a conversation about it rather than just having a question and answer session. (Read IRB description of study; obtain signatures) May I have your permission to audio record this session?

First, I want to get to know a little more about you and your teaching/educational experience.

DEMOGRAPHICS
1. Share with me some background information about your:
   a) years of teaching experience (number of years),
   b) grade levels taught,
   c) school sites,
   d) parishes),
   e) education level, and
   f) certification in LA?

Next, let’s move our discussion to your role as a mentor who uses co-planning. I have a list of questions here, but once we start discussing your role with co-planning, I will jot down responses where they fit. If you have any questions or want to stop me at any time, please do so.

CO-PLANNING EXPERIENCE
1. How have you experienced co-planning in the past?
2. How do you prepare for co-planning with a novice teacher?
3. What materials are necessary for co-planning?
4. How do you use co-planning at the beginning of a yearlong residency experience?
5. How does your relationship with your mentee develop through co-planning conversations?
6. How would your relationship be different without co-planning?
7. Describe the types of conversations you have when you co-plan with a resident teacher.
8. How does your mentee respond to co-planning?
9. What are the benefits of co-planning with a novice, resident teacher?
10. Describe, if any, structures at your school that afford you the opportunity to co-plan.
11. Describe any hurdles you encounter when co-planning with your mentee
12. How does co-planning with a mentee differ from planning on your own?
13. Of all the things we discussed about co-planning and your role as a mentor, what do you think is most important?

Thank you again for taking the time to share your perceptions about co-planning. After I read over our conversation, I might have additional questions for you. May I email you any follow-up questions I might have? Everything you shared about your role as a mentor was very interesting. I look forward to observing you and your mentee in action very soon.

Do you have any questions regarding this research or our conversation today?
APPENDIX B. RESIDENT TEACHER INTERVIEW PROTOCOL

Researcher: Thank you for agreeing to talk to me about your experiences with co-planning. I know you know me as the coordinator for the residency program, but today I just want to have a one-on-one conversation with you. I’m going to ask you a few questions about your experiences with co-planning, but my hope is that we can have a conversation about it rather than just having a question and answer session. I will jot down responses where they fit. If you have any questions or want to stop me at any time, please do so. (Read IRB description of study; obtain signatures) May I have your permission to audio record this session?

1. How have you experienced co-planning in the past?
2. How do you prepare for co-planning with your mentor teacher?
3. What materials are necessary for co-planning?
4. How does your relationship with your mentor develop through co-planning conversations? How would your relationship be different without co-planning?
5. Describe the types of conversations you have when you co-plan with your mentor teacher.
6. What are some things you look forward to when co-planning with your mentor teacher?
7. What are the benefits of co-planning with your mentor teacher?
8. Describe any hurdles you encounter when co-planning with your mentor teacher.
9. Tell me about any structures or practices that would be helpful to you when co-planning.
10. What role do you play in co-planning conversations? What role does your mentor play in co-planning conversations?
11. How does co-planning with your mentor differ from planning on your own?
12. Of all the things we discussed about co-planning, what do you think is most important?

Thank you again for taking the time to share your perceptions about co-planning. After I read over our conversation, I might have additional questions for you. May I email you any follow-up questions I might have? Everything you shared about your interaction with co-planning was very interesting. Everything you shared was very interesting. Do you have any questions regarding this research or our conversation today?
APPENDIX C. WEEKLY REFLECTIVE JOURNAL TEMPLATE

<table>
<thead>
<tr>
<th>Weekly Reflection Journal - Week of ____________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflect on what’s working (Area of Strength)</td>
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<tr>
<td>Indicator on the NIET rubric:</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Reflect on the steps you are taking to improve:</td>
</tr>
</tbody>
</table>

Additional key events and interactions to reflect on from this week:

<table>
<thead>
<tr>
<th></th>
<th>Total # of hours at the school site</th>
<th>Total # of hours teaching and/or observing</th>
<th>Co-teaching strategies used</th>
<th>Instructional Lead:</th>
<th>Planning Lead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td></td>
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<td>Tuesday</td>
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<td>Wednesday</td>
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<td>Thursday</td>
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<td>Friday</td>
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<td></td>
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<tr>
<td>TOTALS:</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
APPENDIX D. PARTNERSHIP AGREEMENT TEMPLATE

<table>
<thead>
<tr>
<th>Mentor Teacher Name:</th>
<th>Teacher Candidate Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>School District:</td>
<td>School Name:</td>
</tr>
<tr>
<td>Grade Taught:</td>
<td>Content Taught:</td>
</tr>
</tbody>
</table>

Collaborative Agreements
The following topics should be discussed together and agreed upon by both the mentor teacher and teacher candidate at the beginning of the residency experience. Mentors and mentees should set aside at least 30 to 45 minutes for this collaborative discussion. During the partnership agreement meeting, mentors and mentees should collaboratively fill in the following template to develop an agreement of their work together. Resident teachers will submit a typed version of this agreement to Moodle as evidence of their discussion. If there are any concerns throughout the semester, the partnership agreement will be pulled as a basis for discussion.

<table>
<thead>
<tr>
<th>Areas</th>
<th>Agreements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time to Meet</td>
<td>Includes time when you will connect with each other; time when you will be available for each other; and the time that you will not be available to each other - especially time related to when planning sessions, classroom visits and debriefs will happen.</td>
</tr>
<tr>
<td>Methods of Contact</td>
<td>The way a mentor and mentee communicate is very important to the success of the mentoring relationship. Oftentimes, a big part of planning for teaching occurs outside of the classroom. Mentors and mentees may have to go back and forth on lesson plan adjustments beyond the normal school hours. Methods of contact should include how mentors and mentees will communicate outside of the classroom. For example, via email, phone, text, etc.</td>
</tr>
<tr>
<td>Responsibilities</td>
<td>Responsibilities include the professional responsibilities that mentees and mentors assume. Moving from the role of a student to one of a professional is a considerable transition for some new teachers/mentees. Mentors need to make the mentee’s responsibilities clear and specific to avoid disappointment. The mentor also assumes responsibilities when he or she becomes a mentor. They agree to communicate clearly with the mentee and agree to provide regular constructive, growth-oriented feedback to the mentee, in addition to agreeing to model, support, co-teach and develop the mentee’s capacity and competence in alignment with the Teacher Preparation Competencies.</td>
</tr>
</tbody>
</table>

(cont’d.)
| Expectations | Expectations are what the mentee and mentor expect of each other, yet often go unstated. Mentors are part of a supportive role, not an evaluative role. A mentee expects fair assessments, opportunities to perform and grow, challenges that are just right for his ability, and ongoing feedback. A mentor expects a mentee to be committed to having a growth mindset about learning and growing as a teaching professional, and to be open to try out new things, take risks, and learn from the mentor. To do so, it is important to discuss instructional goals and review lessons before they are taught to the class. |
| Data and Instructional Goals | Data refers to what data the mentor and mentee will gather about students and their work in the classroom. Data and student work are important to gather so that all conversations between mentor and mentee are based in facts. By including mentees in conversations about data, both mentors and mentees are focused on improving student success. |
| Confidentiality | Confidentiality refers to what types of information the mentee and mentor hold in confidence. This might relate to what information the mentor and mentee agree to share publicly, with the principal, for example, and what they share with other staff members about their interactions. A mentor might be upset if a mentee shares a private conversation with a colleague of the mentor. The mentee might say something in confidence to the mentor only to find that it is later shared with the principal, which also would lead to a breakdown in trust. |
| Location and Logistics | Location is where a mentor first may keep personal belongings or any resources that the mentee might want to bring into the classroom. This helps to establish a reciprocal relationship between mentors and mentees. Logistics can include the arrangement for using each other’s materials or resources and the school’s resources. For example, what resources are needed to teach a specific lesson? Does the mentee need support in securing appropriate resources? |

(cont’d.)
**Follow-up**

Follow-up is another area where there are often disappointments resulting from a lack of partnership agreements. A mentor and mentee should first schedule a debrief about the mentee’s teaching, and then the mentor must ensure the mentee understands their must-do’s after the debrief. For example, in the conversation, the mentee and mentor might discuss revisions for the next lesson. The mentor expects that the mentee will integrate the behaviors they discussed into the next lesson, yet the mentee fails to do so. She thought the ideas were only suggestions and did not understand that she was to make the changes because they did not clarify and follow-up about what was to happen and make sure the mentee was ready to integrate the suggestions. Mentors and mentees should discuss the appropriate time for follow-up conversations. For example, “Huddle” conversations can be used in between classes or between lesson parts when students transition from one activity to another. Also, “sticky note” coaching can be used during a lesson.

---

**Which areas of agreements do you think will be most important between the mentor and mentee?**

---

**How will you use agreements to build trust in your mentor-mentee relationship?**

---

_We have discussed the mentoring experience as a developmental opportunity with the focus of this mentoring relationship detailed in the Residency Handbook. Both parties agree to the above collaborative agreements, along with the roles and responsibilities outlined in the aforementioned handbook. If at any time the agreements discussed within this document are no longer functioning as they should, the mentor and mentee will agree to make revisions._

**Signatures**

Teacher Candidate __________________________ Date __________________________

Mentor Teacher __________________________ Date __________________________
## APPENDIX E. CO-PLANNING/CO-TEACHING CALENDAR

<table>
<thead>
<tr>
<th>Weeks</th>
<th>Co-Teaching Strategies</th>
<th>Minimum Teacher Candidate Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2</td>
<td>• Observation&lt;br&gt;• Active Observation</td>
<td>• Introduce yourself to students in a creative way&lt;br&gt;• Become involved in the classroom instructional plan&lt;br&gt;• Observe routines and classroom management strategies&lt;br&gt;• 90% of observation should be active observation, which includes: monitoring students, scaffolding learning, assisting the teacher with lesson implementation</td>
</tr>
<tr>
<td>3-4</td>
<td>• Co-teaching&lt;br&gt;• Alternative teaching</td>
<td>• Assume partial responsibility for leading classroom routines (e.g., attendance, bell work, dismissal)&lt;br&gt;• Co-plan and lead small group activities</td>
</tr>
<tr>
<td>5</td>
<td>• Above as well as&lt;br&gt;• Station teaching&lt;br&gt;• Parallel teaching&lt;br&gt;• Team teaching</td>
<td>• Co-plan and lead in one subject area or class period</td>
</tr>
<tr>
<td>6-8</td>
<td>• Any co-teaching strategy appropriate for the subject area or classroom setting</td>
<td>• Co-plan and lead in two subject areas or class periods</td>
</tr>
<tr>
<td>9-10</td>
<td>• Any co-teaching strategy appropriate for the subject area or classroom setting</td>
<td>• Co-plan or plan and lead in three subject areas or class periods</td>
</tr>
<tr>
<td>11-12</td>
<td>• Any co-teaching strategy appropriate for the subject area or classroom setting</td>
<td>• Plan and lead all subject areas or class periods&lt;br&gt;• Although not required, this would be an ideal time during the semester to implement the full week of teaching.</td>
</tr>
<tr>
<td>13-15</td>
<td>• Any co-teaching strategy appropriate for the subject area or classroom setting</td>
<td>• Plan and lead in two subject areas or class periods</td>
</tr>
<tr>
<td>16-17</td>
<td>• Any co-teaching strategy appropriate for the subject area or classroom setting</td>
<td>• Plan and lead in one subject area or class period</td>
</tr>
<tr>
<td>17-18</td>
<td>• Observation&lt;br&gt;• Active Observation</td>
<td>• Co-plan and lead in one subject area or class period&lt;br&gt;• 90% of observation should be active observation, which includes: monitoring students, scaffolding learning, assisting the teacher with lesson implementation</td>
</tr>
</tbody>
</table>
APPENDIX F. 2013 CAEP STANDARDS

2013 CAEP Standards

Standard 1. Content and Pedagogical Knowledge
The provider ensures that candidates develop a deep understanding of the critical concepts and principles of their discipline and, by completion, are able to use discipline-specific practices flexibly to advance the learning of all students toward attainment of college- and career-readiness standards.

Candidate Knowledge, Skills, and Professional Dispositions
1.1 Candidates demonstrate an understanding of the 10 InTASC standards at the appropriate progression level(s) in the following categories: the learner and learning; content; instructional practice; and professional responsibility.

Provider Responsibilities:
1.2 Providers ensure that candidates use research and evidence to develop an understanding of the teaching profession and use both to measure their P-12 students' progress and their own professional practice.
1.3 Providers ensure that candidates apply content and pedagogical knowledge as reflected in outcome assessments in response to standards of Specialized Professional Associations (SPA), the National Board for Professional Teaching Standards (NBPTS), states, or other accrediting bodies (e.g., National Association of Schools of Music – NASM).
1.4 Providers ensure that candidates demonstrate skills and commitment that afford all P-12 students access to rigorous college- and career-ready standards (e.g., Next Generation Science Standards, National Career Readiness Certificate, Common Core State Standards).
1.5 Providers ensure that candidates model and apply technology standards as they design, implement and assess learning experiences to engage students and improve learning, and enrich professional practice.

Standard 2. Clinical Partnerships and Practice
The provider ensures that effective partnerships and high-quality clinical practice are central to preparation so that candidates develop the knowledge, skills, and professional dispositions necessary to demonstrate positive impact on all P-12 students' learning and development.

Partnerships for Clinical Preparation:
2.1 Partners co-construct mutually beneficial P-12 school and community arrangements, including technology-based collaborations, for clinical preparation and share responsibility for continuous improvement of candidate preparation. Partnerships for clinical preparation can follow a range of forms, participants, and functions. They establish mutually agreeable expectations for candidate entry, preparation, and exit; ensure that theory and practice are linked; maintain coherence across clinical and academic components of preparation; and share accountability for candidate outcomes.

Clinical Educators:
2.2 Partners co-select, prepare, evaluate, support, and retain high-quality clinical educators, both provider- and school-based, who demonstrate a positive impact on candidates' development and P-12 student learning and development. In collaboration with their partners, providers use multiple indicators and appropriate technology-based applications to establish, maintain, and refine criteria for selection, professional development, performance evaluation, continuous improvement, and retention of clinical educators in all clinical placement settings.

Clinical Experiences:
2.3 The provider works with partners to design clinical experiences of sufficient depth, breadth, diversity, coherence, and duration to ensure that candidates develop their developing effectiveness and positive impact on all students' learning and development. Clinical experiences, including technology-enhanced learning opportunities, are structured to have multiple performance-based assessments at key points within the program to demonstrate candidates' development of the knowledge, skills, and professional dispositions, as delineated in Standard 1, that are associated with a positive impact on the learning and development of all P-12 students.

Standard 3. Candidate Quality, Recruitment, and Selectivity
The provider demonstrates that the quality of candidates is a continuing and purposeful part of its responsibility from recruitment, at admission, through the progression of courses and clinical experiences, and to decisions that completers are prepared to teach effectively and are recommended for certification. The provider demonstrates that development of candidate quality is the goal of educator preparation in all phases of the program. This process is ultimately determined by a program's meeting of Standard 4.

Plan for Recruitment of Diverse Candidates who Meet Employment Needs:
3.1 The provider presents plans and goals to recruit and support completion of high-quality candidates from a broad range of backgrounds and diverse populations to accomplish their mission. The admitted pool of candidates reflects the diversity of America's P-12 students. The provider demonstrates efforts to know and address community, state, national, regional, or local needs for hard-to-staff schools and shortage fields, currently, STEM, English-language learning, and students with disabilities.

Candidates Demonstrate Academic Achievement:
3.2 The provider meets CAEP minimum criteria or the state's minimum criteria for academic achievement, whichever are higher, and gathers disaggregated data on the enrolled candidates whose preparation begins during an academic year.

The CAEP minimum criteria are a grade point average of 3.0 and a group average performance on nationally normed assessments or substantially equivalent state-normed assessments of mathematical, reading and writing achievement in the top 50 percent of those assessed. An EPP may develop and use a valid and reliable substantially equivalent alternative assessment of academic achievement. The 50th percentile standard for writing will be implemented in 2021. As an alternative to cohort average performance on a nationally- or state-normed writing assessment, the EPP may present evidence of candidates' performance levels on writing tasks.
similar to those required of practicing educators.

Starting in academic year 2016-2017, the CAEP minimum criteria apply to the group average of enrolled candidates whose preparation begins during an academic year. The provider determines whether the CAEP minimum criteria will be measured (1) at admissions, OR (2) at some other time prior to candidate completion.

In all cases, EPPs must demonstrate academic quality for the group average of each year’s enrolled candidates. In addition, EPPs must continuously monitor disaggregated evidence of academic quality for each branch campus (if any), mode of delivery, and individual preparation programs, identifying differences, trends and patterns that should be addressed under component 3.1. Plan for recruitment of diverse candidates who meet employment needs.

CAEP will work with states and providers to designate, and will periodically publish, appropriate “top 50 percent” proficiency scores on a range of nationally or state normed assessments and other substantially equivalent academic achievement measures, with advice from an expert panel.

Alternative arrangements for meeting the purposes of this component will be approved only under special circumstances and in collaboration with one or more states. The CAEP President will report to the Board and the public annually on actions taken under this provision.

Additional Selectivity Factors:

3.3 Educator preparation providers establish and monitor attributes and dispositions beyond academic ability that candidates must demonstrate at admissions and during the program. The provider selects criteria, describes the measures used and evidence of the reliability and validity of those measures, and reports data that show how the academic and non-academic factors predict candidate performance in the program and effective teaching.

3.4 The provider creates criteria for program progression and monitors candidates’ advancement from admissions through completion. All candidates demonstrate the ability to teach to college- and career-ready standards. Providers present multiple forms of evidence to indicate candidates’ developing content knowledge, pedagogical content knowledge, pedagogical skills, and the integration of technology in all of these domains.

3.5 Before the provider recommends any completing candidate for licensure or certification, it documents that the candidate has reached a high standard for content knowledge in the fields where certification is sought and can teach effectively with positive impacts on P-12 student learning and development.

3.6 Before the provider recommends any completing candidate for licensure or certification, it documents that the candidate understands the expectations of the profession, including codes of ethics, professional standards of practice, and relevant laws and policies. CAEP monitors the development of measures that assess candidates’ success and revises standards in light of new results.

Standard 4. Program Impact

The provider demonstrates the impact of its completers on P-12 student learning and development, classroom instruction, and schools, and the satisfaction of its completers with the relevance and effectiveness of their preparation.

Impact on P-12 Student Learning and Development:

4.1 The provider documents, using multiple measures that program completers contribute to an expected level of student-learning growth. Multiple measures shall include all available growth measures (including value-added measures, student-growth percentiles, and student learning and development objectives) required by the state for its teachers and available to educator preparation providers, other state-supported P-12 impact measures, and any other measures employed by the provider.

Indicators of Teaching Effectiveness:

4.2 The provider demonstrates, through structured validated observation instruments and/student surveys, that completers effectively apply the professional knowledge, skills, and dispositions that the preparation experiences were designed to achieve.

Satisfaction of Employers:

4.3. The provider demonstrates, using measures that result in valid and reliable data and including employment milestones such as promotion and retention, that employers are satisfied with the completers’ preparation for their assigned responsibilities in working with P-12 students.

Satisfaction of Completers:

4.4 The provider demonstrates, using measures that result in valid and reliable data, that program completers perceive their preparation as relevant to the responsibilities they confront on the job, and that the preparation was effective.

Standard 5. Provider Quality Assurance and Continuous Improvement

The provider maintains a quality assurance system comprised of valid data from multiple measures, including evidence of candidates’ and completers’ positive impact on P-12 student learning and development. The provider supports continuous improvement that is sustained and evidence-based, and that evaluates the effectiveness of its completers. The provider uses the results of inquiry and data collection to establish priorities, enhance program elements and capacity, and test innovations to improve completers’ impact on P-12 student learning and development.

Quality and Strategic Evaluation:

5.1 The provider’s quality assurance system is comprised of multiple measures that can monitor candidate progress, completer achievements, and provider operational effectiveness. Evidence demonstrates that the provider satisfies all CAEP standards.

5.2 The provider’s quality assurance system relies on relevant, verifiable, representative, cumulative and actionable measures, and produces empirical evidence that interpretations of data are valid and consistent.

Continuous Improvement:

5.3 The provider regularly and systematically assesses performance against its goals and relevant standards, tracks results over time, tests innovations and the effects of selection criteria on subsequent progress and completion, and uses results to improve program elements and processes.

5.4. Measures of completer impact, including available outcome data on P-12 student growth, are summarized, externally benchmarked, analyzed, shared widely, and acted upon in decision-making related to programs, resource allocation, and future direction.

5.5. The provider assures that appropriate stakeholders, including alumni, employers, practitioners, school and community partners, and others defined by the provider, are involved in program evaluation, improvement, and identification of models of excellence.

February 2019
caecnet.org
APPENDIX G. IRB APPROVAL

TO: Sulentic Dowell, Margaret-Mary
LSUAM | Col of HSE | Education
FROM: Alex Cohen
Chairman, Institutional Review Board
DATE: 21-Jul-2021
RE: IRBAM-21-0762
TITLE: Exploring Co-planning Conversations as a Professional Development Activity for Mentors and Mentees at the Beginning of a Yearlong Teacher Residency
SUBMISSION TYPE: Initial Application
Review Type: Expedited Review
Risk Factor: Minimal
Review Date: 21-Jul-2021
Status: Approved
Approval Date: 21-Jul-2021
Approval Expiration Date: 20-Jul-2022
Expedited Categories: 07
Requesting Waiver of Informed Consent: No
Re-review frequency: Annually
Number of subjects approved: 14
LSU Proposal Number:

By: Alex Cohen, Chairman

Continuing approval is CONDITIONAL on:

1. Adherence to the approved protocol, familiarity with, and adherence to the ethical standards of the Belmont Report, and LSU's Assurance of Compliance with DHHS regulations for the protection of human subjects*
2. Prior approval of a change in protocol, including revision of the consent documents or an increase in the number of subjects over that approved.
3. Obtaining renewed approval (or submittal of a termination report), prior to the approval expiration date, upon request by the IRB office (irrespective of when the project actually begins); notification of project termination.
4. Retention of documentation of informed consent and study records for at least 3 years after the study ends.

(cont’d.)
5. Continuing attention to the physical and psychological well-being and informed consent of the individual participants, including notification of new information that might affect consent.
6. A prompt report to the IRB of any adverse event affecting a participant potentially arising from the study.
8. SPECIAL NOTE: When emailing more than one recipient, make sure you use cc. Approvals will automatically be closed by the IRB on the expiration date unless the PI requests a continuation.

*All investigators and support staff have access to copies of the Belmont Report, LSU's Assurance with DIIIS, DIIIS (45 CFR 46) and FDA regulations governing use of human subjects, and other relevant documents in print in this office or on our World Wide Web site at [http://www.lsu.edu/research](http://www.lsu.edu/research)*

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REFERENCES


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Wexler, L. J. (2020c). ‘I would be a completely different teacher if I had been with a different mentor’: Ways in which educative mentoring matters as novices learn to teach. *Professional Development in Education, 46*(2), 211-228. https://doi.org/10.1080/19415257.2019.1573375


VITA

Channing Parfait was born in Houma, Louisiana. He obtained his Bachelor of Arts degree in Mass Communication from Nicholls State University in 2013. After working as a newspaper journalist for several months, he became interested in education and returned to Nicholls in 2015 to earn a Master of Arts degree in middle school English Language Arts. While working on his teacher certification and master’s degree, Parfait also taught 6th grade ELA. Parfait graduated from Nicholls in 2017, and he began coursework in the P-12 educational leadership program at Louisiana State University as part of the fall 2018 cohort. During that same semester, he also joined the Department of Teacher Education at Nicholls State University as the Residency Transition Coordinator and ultimately progressed to the position of Coordinator for Clinical Practice and Residency (formerly student teaching). While serving in this role, Parfait was instrumental in communicating with stakeholders and faculty about the development of the residency program at Nicholls. Parfait’s research agenda focuses on the examination of mentoring relationships during the residency year, how the act of co-planning can serve as a professional development activity for novice and experienced teachers to expand their expertise and develop mutually beneficial mentoring relationships during the yearlong teacher residency, as well as the principal’s role in supervising mentor teachers.