

## Expeditionary Learning, Constructivism, and the Emotional Risks of Open-Ended Inquiry

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In this chapter, we examine the experiences of Cathy (a pseudonym), an African American student attending a public charter middle school, whose curriculum emerged from the *Expeditionary Learning* (EL) philosophy. This pedagogy has been adapted to public schools that hope to engage students in activity-oriented, inquiry-based learning. EL was founded on the concept of an expedition, commonly understood as a group journey undertaken to explore new territory for discovery, research, conquest, or other goals. When adapted to schools, EL tends to be oriented to learning-directed quests and activities. The infrastructure of EL allows for constructivism to flourish in a variety of ways, as we report, but can also be thwarted in a number of ways.

### EXPEDITIONARY LEARNING

The sense of discovery engrained in the assumptions behind EL appears well aligned with the progressive ideas of Dewey (1902). Knowledge, rather than being fixed and established, is understood in this conception as a

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socially mediated construction of the learner, who seeks new understanding through the process of inquiry and investigation in relation to undertaking complex tasks within social boundaries. Not only is the activity constructivist in design, the concepts that emerge are social constructions available to the students through agency and control over their growth and learning (Smagorinsky, 2013).

### *Expeditionary Learning as Comprehensive School Reform*

Sociocultural perspectives on power and cultural diversity (Vossoughi & Gutiérrez, 2017) suggest the importance of examining the historical context of the development of EL, which went from being a boutique program to a funded charter school program model in spite of being at odds with the sort of centralized, reductive reform gripping the US since the 1980s. Its constructivist emphasis appears to be the antithesis of federal educational policies of US for nearly four decades, with the 2000s providing a radical turn toward standardization and uniformity in curriculum, instruction, and assessment.

EL became incorporated into US educational practice during a period of Comprehensive School Reform (CSR). EL was bolstered by Title I and New American Schools Corporation funding (Farrell & Liebowitz, 1998, pp. 14–15) beginning immediately after the founding of the US Department of Education in October 1979. CSR has been described in terms of three eras, which focused on different aspects of schooling. The initial focus of school reform was on fixing schools through state government intervention (Murphy & Datnow, 2003). From 1980 to 1987, during the first era, presumably failing schools were attributed to ineffective teachers and materials, as suggested by the alarm of a “rising tide of mediocrity” that the Reagan-era *A Nation at Risk* (National Commission on Excellence in Education, 1983) warned of in precipitous terms. This reform era produced many new textbooks and curriculum materials designed to help teachers make greater demands on students, under the assumption that their own low standards had produced this presumed crisis to begin with. Centrally developed “teacher proof” materials were included in the instructional tool kit provided by policymakers, textbook companies, and university researchers and education entrepreneurs to save education from the teachers and open a new education market for corporate intervention (Bennett, 2013).

The second era of CSR ran from about 1987 to 1995. A lack of test-score improvement raised questions about the government's ability to change the performance of schools. As a result, CSR philosophy underwent a shift in impetus from centralized experts to local initiatives. Under local control, teachers and parents were considered capable of promoting student achievement. The focus turned from classroom instruction to the bureaucratic structure of schools, which required a shift from mechanistic reinforcement strategies to a professional approach to reform that treated teachers as authorities, and from regulation and compliance monitoring to mobilization of institutional capacity. As a result, decisions were to be made in school by the teachers, and families were in many cases given the opportunity to choose their child's school (Murphy & Datnow, 2003).

This shift toward local control, however, was undermined by its centralized authority and its view that only "scientific, evidence-based" results from the experimental paradigm would be consulted to inform practice (see U.S. Department of Education, 2004). In other words, local control was complicated by federal mandates that eliminated access to the complex, detailed, situated knowledge available through open-ended qualitative studies of the sort that are compatible with investigating constructivist education as a situated practice. Instead, the reliance on experimental research mapped well onto the standardized testing regime preferred by policymakers and many university researchers whose work became magnified by these policies. Local control was thus only possible within federal superstructures that limited local educators' vision and imagination, leaving the two imperatives fundamentally at odds and yet simultaneously demanded.

The third era of CSR was characterized by holding schools responsible for student outcomes, typically through achievement test scores that teachers often found inadequate measures because of their narrow emphasis on tests at the expense of broader concerns with producing knowledgeable, caring, civic-minded citizens (Kastenbaum, 2012). This discontent remains today, as testing has increasingly discouraged schools from teaching in more constructivist ways (Ravitch, 2013).

Amidst this national obsession with standardization and centralized curriculum, instruction, and assessment, counter-movements emerged that were more student oriented. Some were general, such as the movement toward emphasizing learning processes during instruction (e.g., the writing process movement and transactional reading theories in English/Language Arts instruction). Others were specific, such as the development of EL as a school-wide theme and the persistence of the Montessori curriculum. These

approaches, however, were limited to special environments such as charter schools and independent schools. Most public schools were required to submit to testing regimes that have occupied instructional time, school resources, internet bandwidth, teachers' planning periods, students' and teachers' emotional capacity, and other casualties of the drive to dedicate the school to increases in standardized test scores.

With EL's approach founded on a sense of mission rather than one of meeting market demands (Farrell & Liebowitz, 1998), the approach sits quite uncomfortably in relation to national policies, even as EL students tend to do well on standardized tests. What remains unclear is whether EL itself produces this salutary effect on policymakers' sensibilities, whether schools adopting it recruit from families whose parents position their children well to succeed in school and on its testing regimens (UMass Donahue Institute Research and Evaluation Group, 2011), and other factors contributing to single-score measures of complex educational processes.

The CSR initiatives coincided with EL rather than generating it. The CSR infused education with funding that had previously been unavailable. President Carter's founding of the Department of Education was generously funded to jumpstart promising programs that helped schools meet its goal of improving education or at least improving test scores. EL benefitted from the availability of funding, even if it departed from the narrow, prescriptive, reductive vision of education that the US Department of Education has funded over time.

### *Expeditionary Learning and the Constructivist Tradition*

EL is a national reform movement for schools characterized by the co-construction of community by students and faculty through "school structures and traditions such as crew, community meetings, exhibitions of student work, and service learning," a quote found on many EL school websites (e.g., Manara Academy, 2017). Its pedagogy is designed to provide engaging and purposeful work with and for authentic audiences, opportunities for students to talk and think with teachers who listen, and a school-wide culture of trust and collaboration (Expeditionary Learning, 2011, p. 5).

EL originated in the Outward Bound (OB) organization founded by educator Kurt Hahn, who was born in 1886 (Neill, 2008), within a generation of a host of progressive educators including Cecil Reddie (b. 1858), John Dewey (b. 1859), Rudolf Steiner (b. 1861), Maria Montessori (b. 1870), and Virginia Estelle Randolph (b. 1874), and a decade before

the 1896 birth of both Lev Vygotsky and Jean Piaget, architects of constructivist paradigms. In 1930, Kurt Hahn provided the groundwork for OB by founding the Gordonstoun school in Scotland, with an enrollment of two students. In 1934, the third pupil, Prince Philip of Greece, who ascended to the title of His Royal Highness the Duke of Edinburgh, signed up as well. Gordonstoun allowed Hahn to integrate his philosophy in a curriculum focused on athletics, outdoor survival, and classroom learning (Outward Bound International, 2013).

Hahn relocated the school to Wales, enlisting the help of British shipping baron Sir Lawrence Holt, who was recruited to help teach the boys skills to survive World War II. Together, their training program aimed to develop the “tenacity and fortitude” needed by sailors to “survive the rigors of war and shipwreck” (Outward Bound International, 2013, n.p.). This curriculum embodied Hahn’s belief that team-oriented character development forged through challenging experiences in nature was a top educational priority. Hahn found that people developed “confidence, redefined their own perceptions of their personal possibilities, demonstrated compassion, and developed a spirit of camaraderie with their peers” when placed in “challenging, adventurous outdoor situations” (Outward Bound International, 2013, n.p.). This Hahn and Holt partnership blossomed into the first official OB course in Europe in 1941.

The name Outward Bound refers to the nautical term for leaving a safe port for the rigors of sailing. Although the courses that Hahn originally created were designed to ensure the survival and rescue of sailors, subsequent OB programs were open to non-sailing enlistees seeking to develop as leaders through multiday excursions into a variety of wilderness settings. Courses included an array of activities such as mountain climbing, kayaking, and trekking, carrying a significant price tag, and being available for college credit (McQuillan et al., 1994).

The first OB course in the US was offered in 1962. While OB continued to offer wilderness experiences for youth and adults focused on developing leadership skills, OB also set up urban centers designed to recruit a more diverse student body in the 1980s. In these centers, OB courses included team-building events for corporations, young people, and people in various recovery programs following alcoholism, arrest, or other socially unacceptable behavior that might benefit from team-centered wilderness challenges. All courses emphasized reflection, community, success, acquisition of skills, and engagement with the natural world, in which participants were challenged but supported on their adventures.

OB's influence in the classroom continued to grow through a 1998 partnership with the Harvard Graduate School of Education. OB brought experiential learning to Harvard, and Harvard brought its reputation for academic rigor to OB. In the 1990s, OB focused on becoming an educational reform model and received funding from the New American Schools Development Corporation to put its theory into practice. Expeditionary Learning Outward Bound (ELOB) started with ten demonstration schools in 1993. At that time, there were 165 schools in 30 states and Washington, DC, serving 45,000 students and employing 4000 teachers (EL Education, 2017). In these schools, the original OB notion of challenge expanded to include the ways in which students and teachers perform and conceptualize education in the classroom setting. ELOB as a reform model promoted the belief that the core of learning and growth involves the interaction available through groups who take on challenges in new environments, providing them with knowledge that is presumed to carry over to other educational and workplace settings and their demands (Pearson, 2002). The name was revised to Expeditionary Learning, and the EL network grew into 165 EL schools across the nation during the time of Heath's (2013) study.

Today, EL schools emphasize learning by doing through a multiyear professional development plan with instructional materials and technical assistance. This approach is designed to promote changes in school culture, teaching practices, and student achievement scores (Pearson, 2002). Teaching and learning in an EL school involves work in and out of the classroom to allow students to investigate topics of their choice and interest, to engage with content experts, to have opportunities to develop critical thinking abilities, and to develop student agency, character, connection, and voice. The American Institutes for Research's (2006) review of reform models noted that the EL model eschewed a prescribed curriculum, allowing individual schools to create their own programs aligned with the governing philosophy.

### THE EXPEDITIONARY LEARNING MIDDLE SCHOOL

EL design principles and benchmarks were used as guiding philosophies for the Expeditionary Learning Middle School (ELMS), the school we feature from Heath's (2013) study. These principles were taught explicitly to students and were distributed to the students on a bookmark on the first day of school, displayed in the hallways, and included in the school handbook. These principles emphasize self-discovery, the fostering of curiosity

through the cultivation of “wonderful” ideas, students’ personal responsibility for learning, the development of empathic and caring dispositions, experiences with success and failure, opportunities for collaboration and competition, the promotion of diversity and inclusion, engagement with nature, and occasions for solitude and reflection.

Learning expeditions structure the academic year, designed to provide extended investigations on topics of interest outside formal classrooms that typically have value for the local community. Through these inquiries and projects, the students provide service to the community, engage in adventurous thinking and acting, and have a public dimension (ELMS Pamphlet, 2010a, 2010b, 2010c). The curriculum is interdisciplinary, involving Math, Science, Language Arts, and Social Studies, and requires projects that display student progress and knowledge (ELMS website, 2010d).

Students, administrators, and teachers in the school were a part of a crew comprising a small group of students (10–15) and one teacher who met every day, every week, over the three years that the student was enrolled at ELMS. The crew was an essential component of the EL model and in some ways looked similar to a teacher advisory meeting, a group counseling session, a book club, or a homeroom. According to the American Institutes for Research’s (2006) review of middle- and high-school comprehensive reform models, EL crews helped to produce positive relationships among students and between students and their teachers.

The notion of “expedition” suggests a general destination, the pathway toward which may be navigated in a number of ways, including those conceived emergently in relation to exigencies. This voyage is undertaken in the team-centered manner that typifies sociocultural versions of constructivism, which emphasize social mediation as a critical factor in human development (Smagorinsky, 2011). The case study presented (Heath, 2013), Cathy’s expedition, was the planning of a school Halloween Dance rather than a wilderness voyage. As in the original conception, however, this activity required the student to draw on knowledge from prior experiences and to develop new understandings through both social interaction and response to challenges in the social and material environment of the school. In wilderness expeditions, this knowledge is applied to a task with potentially deadly consequences, making the knowledge immediate, real, and urgent. The EL environment was designed to move school learning beyond the abstractions of classrooms and put students in the position of solving authentic, real-world problems within the realities of the school context.

In EL, collaborative reflection is assumed ideally to emerge spontaneously during the lulls in challenge. This reflection in turn allows the reconsideration and reconstruction of possible ways that the situation could have been addressed and might be addressed in the future. The students themselves thus become critical sources of knowledge construction under material conditions that have potentially threatening effects, making this knowledge quite authentic for those involved. This knowledge then gets continually refined through additional experience and reflection, making the students expert learners about teamwork, natural phenomena, human interventions, and whatever academic requirements for science, mathematics, literacy, history, or other formal knowledge they might use to inform their ongoing developments of new understandings.

### *Cathy, the Dance Planner*

Cathy, a seventh-grade African American girl, lived with her mother, father, and younger sister in what she called an "African American suburb." Her parents were both college graduates; her father studied law, and her mother worked in the medical field educating patients at the university hospital. Cathy reported that she had been picked on because of her large body frame and dark skin tone, but she decided to be strong and stop caring about people's opinions. She wrote and printed the proposal, which she used as the basis for her presentation. She said that once she decided to be herself, other people met her on her own terms and that at the time of the dance project, she felt that she was liked and accepted by her classmates.

She was in her second year at ELMS and it was her second year of being involved with the Halloween Dance, which may be considered a well-defined yet open-ended project. Cathy felt passionately about investing herself intensively in making the dance a success. Planning the school dance required following several necessary general steps, including writing a proposal and presenting it on stage to the entire school at one of the weekly meetings, a step that had discouraged less confident students from proposing projects. She wrote and printed the proposal, which she used as the basis for her presentation. The proposal required Cathy to communicate her vision in terms of scheduling, budgeting, and party planning. She needed to anticipate the timing, communication, and coordination of multiple factors and how to execute each stage on schedule. School started in August, and planning an October dance was a big undertaking.



After reading and explaining her proposal to the school, which included over 100 teachers and students, Cathy took questions from the audience about her proposal. She came to the public proposal session prepared with chart paper and a marker to capture the audience's questions and the names of the students who wanted to help. She worked with a teacher on questions that were beyond her authority to decide, such as whether students from other schools could attend, if she could enlist bands to play, and if the price could be adjusted to encourage attendance.

Cathy used the morning crew meetings and tried to schedule other meetings to talk with teachers and administrators about moving the proposal forward. Planning was a struggle, but she persisted for months. She drafted a variety of plans for the dance, created posters to promote the event, put together committees and established rules for participation on them, gathered more signatures from students than required, drafted a formal proposal to school members to proceed with the dance, and conceived of and anticipated an exhaustive set of possibilities that would make the dance a memorable experience.

#### *Factors That Undermined Cathy's Experience*

Faith in Cathy's ability to engage in the full range of leadership activities to plan and carry out the dance rested upon a set of assumptions about her knowledge and resources. It was assumed that Cathy knew how to type and that her family had a computer and printer in their home so she could type and print her proposal. Because her family did not, in spite of being college-educated professionals, this became a multiday ordeal at school.

Although Cathy was enthusiastic thinking about balloons filled with fake blood and the playlist for the night's soundtrack, it was also assumed she was able to run committee meetings with other students during her lunch period. Cathy made a good attempt at running the meetings, requiring her classmates to sign in and list the items they were bringing to the dance. Field notes of observations reveal that most of the students were playing, talking, painting their nails, and inattentive during the meetings. Afterwards, Cathy reported being extremely disappointed that her own diligence was not met by a similar commitment from her teammates. She felt as if she had been "listened to but not heard" and that "someone else could do it" next time. Cathy felt that her classmates lacked sufficient commitment to the project, leaving her to take on many demanding jobs with only token peer contributions.

In addition, the teachers in her school were overextended and struggled to follow through in supporting her leadership on the project. The school established roles for teachers that involved guidance rather than explicit direction. This guidance came in the form of setting up challenges and serving as a resource to help the students achieve a worthwhile end. Ideally, they would be accessible to student planners throughout their project undertakings. Yet for Cathy, faculty support was largely unavailable because the teachers were still learning the EL philosophy and spread too thin to give her the levels of support she needed. Given the scope of planning and carrying out the dance, the process became overwhelming for a middle-school girl undertaking the management of her first major social event. As a result, Cathy had to take social and academic risks that she found emotionally and motivationally threatening, ultimately becoming so prohibitively imposing that she elected to withdraw from further leadership roles and the school's EL mission.

A second set of adults provided too much uninvited and disruptive assistance. As the dance approached, her classmates' parents took an interest in the event and, apparently under the assumption that they needn't consult with and work under the authority of a middle-school girl, commandeered the project with their own ideas. Recruited by a letter sent home by the school, the student's family members joined a volunteer organization meeting after school a few weeks before the dance. A number of volunteer opportunities were listed and Cathy said that she was glad to see "her" Halloween Dance included, but she was also frustrated that she could not attend and direct the portion of the meeting where the adults would be talking about the dance. Her mother attended the adults-only meeting to help make Cathy's voice heard. According to Cathy, it was at this meeting that well-intentioned volunteers began to disregard her ideas and take control of the planning. She felt uninvited stakeholders hijacked the project to meet their own goals. Cathy was frustrated because, although she was the designated leader of the dance activity, she was thwarted by unwanted interventions, insufficient faculty involvement, and a lack of wholehearted participation by other students whom she had recruited to assist her in labor-intensive aspects of planning the event.

Cathy's role as the planner of the dance was affected by a variety of factors. The school itself was implementing the new EL curriculum, with teachers having to learn on the fly how to put the philosophy and its accompanying curriculum and instruction into practice. This was less than ideal support for Cathy's leadership role. She had to manage committees,

meetings, supplies, decorations, entertainment, contests, promotions, permissions, transportation, staffing, and other facets of planning the event for over 100 students. This responsibility was well beyond her entry-level skills and knowledge. The dance was well attended and those attending participated enthusiastically in a dance contest, a rap performance, a costume contest, a raffle, and a buffet in an atmosphere enhanced by a smoke machine and light effects. Despite appearing successful in her efforts, she felt frustrated and discouraged by her experience to the point where she disengaged from further leadership in school activities.

#### *What Worked, What Did Not*

Cathy accumulated a great deal of useful experience in the process of planning the dance. Rather than building on this experience, however, she subsequently withdrew from participation as a leader of school events. She had hoped, for instance, to open a school store, but decided that she could not endure another round of frustrations and abandoned the idea. The Halloween Dance had exhausted her emotional investment to the point where she could not bring herself to rally her classmates with another proposal.

Despite the school's stated commitment to mutual collaborative efforts to survive and discover one's strengths through a challenging ordeal, the potential of these intentions was not borne out in Cathy's experiences. It's one thing to ride a raft down a set of rapids, but quite another to ride one over Niagara Falls. Cathy simply was not prepared for the magnitude of the job, and in executing it, she got insufficient help from teachers and students and was subject to too many uninvited parental efforts to change the course of her expedition. She was thus denied the opportunity to have the measured support that she needed to feel that she had been the captain of a journey in which all hands were on deck.

The notion of risk-taking is central to the idea of the expedition and is central to many notions of constructivism (Hills, 2007). Engaging in open-ended projects covering unfamiliar terrain involves taking risks. In her planning of the dance, Cathy opened herself to what she felt were a few too many. As the project's official leader, she had responsibility for the performance of the students whom she enlisted to become involved. Their lack of dedicated engagement created tremendous anxiety for her throughout the process. If the dance had failed, she would have been the person

accountable. The uninspired performance of her peers amplified her fears of failure right through the evening of the event.

Perhaps the dance's ultimate success could have taught her that taking on big, complex jobs is satisfying, because they require the overcoming of obstacles. Initiating and leading a project, even one that does not succeed, can teach a student how to meet and address difficulties. Some might regard her project as a successful activity through which she grew into new states of competence and achievement, gained in stature, and prepared herself for further leadership roles, because ultimately the dance was a success. However, she appeared to become embittered and disengaged rather than empowered as a result of her experience, because the task overwhelmed her and left her feeling isolated among peers and overruled by parents.

As Csikszentmihalyi (1998) might note, the "flow" of an activity—the point at which engagement is so great that a participant has no conception of passing time—is available when there is a good match between ability and challenge. Too great a challenge for one's present abilities produces anxiety and frustration, too little a challenge produces boredom. An appropriate constructivist activity would produce neither extreme. Rather, the challenge would be just within the outer limits of, or possibly slightly beyond, one's abilities to help the student to stretch into new levels of competence and confidence. Cathy's project was admirably ambitious, yet not sufficiently supported. Despite her hard work on this project, Cathy ultimately reported seeing herself as an "okay" student rather than a producer, a leader, a reader, a writer, a visionary, a change maker.

We see inconsistencies between the theory and practice of the EL observed in this school due to what might be a romanticized notion of both the child and the educational system and their potential for collaborative, civic-minded conduct. The assumption that becoming a team or crew member automatically confers on the students a sense of fairness and equal opportunity may in fact reify social inequity by leaving it unmonitored (Lewis, 1997). In Hahn's founding conception, EL builds on the idea of crews embarking on sea voyages to rescue lost sailors, create leaders, and defeat opposing fleets, all motivated by a missionary sense of salvation. This noble sense of purpose, however, does not anticipate that crews composed of children or youth may lack the maturity, group investment, and sense of equity, among other factors, that affect the success of disparate people who work collectively toward a group goal.

We believe in the general goals of EL and offer several suggestions. Schools should not expect too much too quickly. They should build project

expectations gradually. Without sufficient support, they run the risk of creating too much uncertainty. Teachers should provide greater guidance to students who propose projects in terms of the scope of the work and complexity of the tasks and do so without hijacking their expeditions. The wrong kind of guidance for a complex, uncertain inquiry may leave student project leaders in overly vulnerable places and undermine the developmental possibilities.

It is critical to infuse the school with a sense of common purpose and mutual accountability as well as personal responsibility. If students are allowed to think that only the designated leader is accountable, they may take their responsibilities lightly and shift them disproportionately to the leader, who may not be mature or skilled enough to manage so much work and the pressures of sole answerability for a project's outcome. Adult involvement is necessary to help student leaders make fellow students accountable for being responsible participants.

Perhaps foremost is emphasizing what it means to take on a role in a group activity. In naval crews, there are severe consequences for failing to pull one's weight and potentially horrific consequences for crews whose members perform indifferently. If students believe that there are no consequences for not carrying out their responsibilities, then they only have the incentive of personal satisfaction to motivate their contributions. Not all students are driven by the intrinsic motivation to love learning—a romanticized notion about children that can allow constructivist possibilities to go awry (Goodyear & Ellis, 2007). Teachers must devise ways to encourage crew members to be accountable to one another and to their student leaders. Teachers must also serve as a firewall between students tasked with leading expeditions and parents who impose themselves in school projects. Schools often hope to involve parents, yet need to make sure that this involvement is supervised, monitored, and limited so that students who are entrusted with leadership roles are not undermined by parent groups. We feel teachers and other adults should provide formative feedback, support, and guidance without taking over the students' work.

Constructivist programs like EL have great potential that can be undermined by the assumptions that things will take care of themselves, that adults should stay entirely out of the way so that kids control their own learning (e.g., Graves, 1983), and wholly relying upon social processes not mediated by adults. The realities of adolescent conduct point to the importance of adult guidance and monitoring when students undertake new challenges involving the orchestration of diverse people toward a unified end.

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