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ARTICLE

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Utopian methodology: Researching educational interventions to promote equity over multiple timescales

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ABSTRACT

Background: This article explores the methodological foundations for a utopian methodology as a form of Design-Based Intervention Research (DBR) that can guide the process of envisioning, implementing, sustaining, and critically evaluating the more radical forms of educational activity systems that prefigure the utopian goal of an equitable and humane education system.

Methods: We examine, guided by a utopian methodology lens, the examples from three national traditions for designing and implementing equitable educational activities. Each illuminates critical phases in the process of conducting DBR, combining social theory and cultural-historical activity theory.

Findings: We propose methodological principles for a utopian methodology as a form of DBR: a) Some conditions for sustaining and re-generating the utopian goal should be explicitly considered; b) Examine the recurring challenges to viability and achievability of the utopian design in its learning ecology that emerge for observation over multiple times scales; c) Self-critique and collaborative re-design for a new iteration.

Contribution: Taken as an ensemble, the cases analyzed here illustrate the broad usefulness of the utopian methodology that we propose in order to maintain the light of the utopian goal and challenge domestication process embedded in any process of change and transformation of the status quo.

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Introduction

When it comes to promoting and researching learning beyond the laboratory into classrooms and the so-called real world, design-based intervention research (DBR) is a signature approach in the learning sciences. DBR is a blend of empirical educational research and theory-driven design of learning environments that can be used for advancing the understanding of how, when, and why educational innovations work (Design-Based Research Collective, 2003).

Existing DBR projects have been subject to methodological criticisms that limit their applicability, including a lack of attention to institutional structures (Cole, 2016), lack of long-term commitment to interinstitutional partnerships to evaluate the sustainability of designs (Anderson & Shattuck, 2012; Penuel, 2019), methodological and practical difficulties of fulfilling the requirement for multilevel analysis (Cole, 2016), and linear notion of progress combined with a lack of attention to the research participants' resistance to and reinterpretations of the designs (Engeström, 2011). For research seeking to promote equity in learning by transforming institutions, a more fundamental limitation is that DBR studies are typically guided by pragmatic concerns and are oriented toward designing relatively small educational improvements within the existing institutional order (Anderson & Shattuck, 2012). However, incremental changes are not sufficient for addressing racial inequities and oppressive power relations in learning (Gutiérrez et al., 2020).

Recent research in the learning sciences has paved the way for shifting the orientation of our work from the given to radically new possibilities in designing for learning and equity (Stetsenko, 2016; Vossoughi, 2021). A special JLS issue, edited by Curnow and Jurow (2021), examined social movements as productive sites for critique and radical imagination. Bang and Vossoughi (2016) highlighted transformative possibilities in participatory design research as a way to question the power relationships in research partnerships. Uttamchandani (2021) used the concept of prefiguration to design and research radical alternatives to existing activities and sociopolitical relations, with a future-oriented aim of transforming oppressive institutions.

In the current article, we explore the methodological foundations for what we call a utopian methodology as a form of DBR that can guide the process of envisioning, implementing, sustaining, and critically evaluating the more radical forms of activity systems that have become both possible and necessary in the current world crisis. Our work is motivated by a long-term commitment to the utopian goal of an equitable and humane education system that supports the dignity of and rich learning opportunities for all children and young people. This goal was recently articulated by Na'ilah

Suad Nasir in her AERA 2022 Presidential Address, in which she noted the utopian quality of the goal, arguing that its realization requires confronting powerful systems, including systemic racism, that perpetuate inequality and oppression. Indeed, educational history is rife with failed attempts to reinvent education. The routine appearance of apparent magic bullets for education's persistent recreation of the status quo (think typewriters, then TV, then desktop computers) inspired Tyack and Cuban (1995) to characterize such educational reforms as fireflies, which "…may look successful when judged soon after adoption, but in fact they may turn out to be fireflies, flickering brightly but soon fading" (p. 7).

In this difficult task, we draw upon and synthesize the research on utopias in social theory and cultural-historical activity theory (CHAT). First, we give a brief overview of each of these lines of research. Drawing on these materials, we examine examples from three national traditions for designing and implementing equitable educational activities. Each one illuminates critical phases in the process of conducting educational design research, which strives to implement the intermediate steps toward the realization of the utopian goal of a racially just and humane education system. We conclude by considering the lessons learned from viewing each example through the lens of our version of a critical utopian approach toward DBR.

Prior invocations of utopia in social research

The term "utopia" was coined by Thomas More in 1551 as a pun on a good place/no place in his classic novel, which was situated on the fictitious Island of Utopia. Although we locate the concept of utopia in the context of European social theory, similar concepts have existed in many traditions, including ancient Judaism, Zoroastrianism, and others. Furthermore, many social movements and educational activists—see, for example, studies on Black futurism (Winn, 2022) or Afrofuturist speculative fiction (Thomas, 2018)—have strived to create more equitable futures without using the concept of utopia. Despite its roots in European social theory, the concept of utopia can be conceptualized in a way that does not tie it to Eurocentrism and that acknowledges the many different forms, contents, and functions of humans striving for alternative worlds (Levitas, 2013; Sousa Santos, 2014).

Our position aligns with Levitas' (2013) reconceptualization of utopia as a method (see also Rajala, 2021):

> The core of utopia is the desire for being otherwise, individually and collectively, subjectively and objectively. Its expressions explore and bring to debate the potential contents and contexts of human flourishing. (p. xi)

Disputing the idea of utopia as a blueprint, Levitas gave priority to reflexivity, provisionality, and dialogue in the building of utopias. Possible futures

should be regarded as partial and provisional, as well as open to criticism and debate. The recognition of the partiality and reflexivity of utopian imagination is also central for dealing with the risks of utopias, for example, the violent imposition of utopias on others. In contrast to the common notion of utopia as a perfect or near-perfect world, we find it more useful to think of utopian projects as the ubiquitous aspects of everyday life from which the research draws.

As the firefly metaphor regarding promising but short-lived innovations should make clear, failures are an inevitable part of utopian projects. When a utopian form of educational activity succeeds in stabilizing itself, its subsequent dissolution reveals the enduring features of the social ecology, which have the power to disassemble it and consume its resources. It is at such moments that the process leads to social critiques highlighting whose utopias are being amplified and naturalized as pragmatic and whose are being ignored.

In contrast to utopias that are conceived of as comprehensive visions for reconstituting whole societies and their institutions, we are concerned with more modest utopias, specifically those in the form of institutional innovations in educational settings. Such institutional innovations are crucial in preparing societies for more comprehensive and far-reaching transformations (Wright, 2007). Thus, although education alone can only play a contributing role in social change, education nevertheless constitutes a critical foundation in the pursuit of a humane and racially just society.

Wright (2007) offered three useful criteria for elaborating and evaluating social alternatives of the sort involved in educational intervention research: a) *desirability* outlines the normative goals of a proposal for social change, b) *viability* addresses the dynamics and unintended consequences of the proposal when it is implemented, and c) *achievability* requires implementing the proposal in a given set of sociohistorical and political circumstances. To Wright's criteria, we add a fourth. Can the proposal be sustained beyond its initial circumstances and the resources committed to creating it in the first place?

Despite their usefulness, Levitas and Wright did not provide a concrete utopian methodology for how to design educational innovations. To fill this gap, we turn to CHAT and its methodology for additional insight.

Utopian methodology in CHAT

In the current paper, we revisit and elaborate on the methodological proposal made by one of the authors 20 years ago (Brown & Cole, 2001). The authors introduced the idea of a utopian methodology as a tool for researching, building, and sustaining alternative institutional arrangements for supporting educational activity. Their example was the 5th dimension

(5thD) afterschool program that had been operating successfully for an unexpectedly long time (from 1987 to 2002). The researchers created an alternative educational activity designed to be implemented during the afterschool hours in collaboration with community-based after-school institutions (Cole, 2006). The 5thD engaged elementary and middle school children and college students as participants in a mixture of play-based activities with underlying involvement in reading, writing, and problem solving. The overall project required cooperation and coordination between a departmental course and a host institution (YMCAs, Boys and Girls Clubs, school-based afterschool programs, etc). The common goal uniting university and community partners was enhanced educational experiences beyond their individual means. They enabling existing after school institutions to increase their educational programming while at the same time providing social science students with the rare opportunity to connect classroom facts and theories with relevant life experiences where theory turns into practice.

The research project sought to understand the failure of so many educational innovations that initially appeared to be transformative of long-standing educational practices (Sarason, 1990). The authors framed their inquiry as a dialogue with critical theorist Adorno (1984). Writing in the 1930s, Adorno, disillusioned by the Soviet Union and confronting the rise of fascism in Europe, had denounced concrete and positive political suggestions for radical social reform for two inter-related reasons. First, he did not believe that radical action could avoid repression by the status quo. Second, he believed that those who deviated and endured would, over time, become domesticated—that is, assimilated within the prevailing institutional constraints and power relations. Our stance differs from Adorno's pessimism; we believe that nonincremental educational change is both possible and necessary. However, the process of domestication that Adorno observed should be of central concern in utopian methodological research, as we will show in the current paper.

More recently, Sannino (2020) adopted a utopian methodology in her study of the eradication of homelessness by using the Change Laboratory method to promote and research utopian imagination in the interactions of actors from several sectors, organizations, and hierarchical levels; she proposed the concept of enacted utopia for examining the practices and processes that sustain utopian designs. Gutiérrez et al. (2020) proposed a utopian methodology for designing equity in learning. Their approach relied on what they referred to as social design experimentation, which revolves around the utopian goal of creating equitable, resilient, sustainable, and future-oriented learning ecologies for marginalized children and youth.

Three empirical cases. Critical phases of a utopian design-based intervention

In this section, we conduct retrospective analyses of three empirical studies to illustrate critical phases of a utopian design-based intervention, here starting from an examination of goal formation in the envisioning of a model of compassionate kindergarten to a redesign and reformulation of a previously successful intervention conducted in a different country and finally to a project that has continued to grow and develop over a few decades (Figure 1). These specific phases were selected to illustrate as a comprehensive view as possible into the critical phases and timescales of utopian methodological research, as it extends over time and space. The retrospective analysis of these past and ongoing studies allowed us to extract useful lessons to guide further pursuits of utopian methodological research. Furthermore, a retrospective analysis is an important aspect of a life course analysis of utopian designs, going all the way from their inception to demise (Cole, 2016).

The studies draw upon CHAT principles in their design but differ in several important respects, with each seeking to rise from the abstract to concrete. Drawing on insights from CHAT, common to all three studies is an emphasis on the cultural and institutional organization of human action and a focus on culturally organized activities in their institutional settings and wider socio-historical and cultural contexts as units of analysis. Furthermore, a central feature of the activities is the mediation of action through symbolic and material cultural artifacts in social interaction. Cultural mediation constitutes a fundamental precondition for the development of individuals and

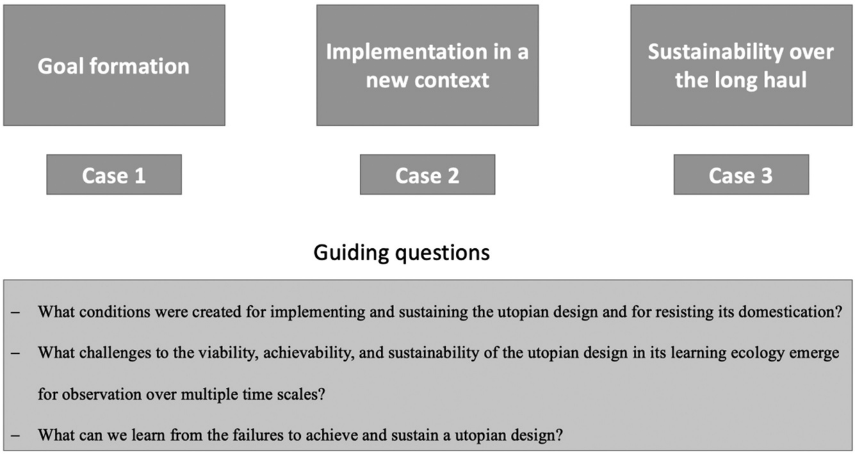

Figure 1. Critical phases of utopian methodological research.

activities. From a CHAT perspective, utopian designs are studied in the process of their enactment and formation (Sannino, 2020). Our focus is on the life course of the activities embodying the utopian designs. The development of these activities occurs in contexts of varying levels of inclusiveness and in a mutual interchange at intersecting timescales (Cole, 2016). Overall, utopian methodology should be attuned to timescales that are short enough to trace processes of moment-to-moment change while being long enough to trace the changes at the level of activity (or system of activities) in an institutional context from the conception to the death of the project. Ideally, the design should be followed for an additional time after the death of the project to see if and how the initiating institutions reallocate the resources. Data collection should involve dense documentation from several sources at several levels of the system, as well as provide appropriate data for each time/context scale.

Moreover, common to the three studies is that each is concerned with the issue of creating the kind of school system that Nasir envisioned. However, the studies have employed importantly different methods, each of which entails a different understanding of the conditions that constitute long-term sustainability. Consequently, each project has its own prototype of an "ideal," utopian outcome. Only Case 3 began as a self-consciously utopian methodological study, but we hope to illustrate how the adoption of a critical utopian logic can provide a mode of inquiry that serves as a guide to critical self-reflection and productive reiteration.

The following questions have guided our analysis and discussion:

- What conditions were created for implementing and sustaining the utopian design and for resisting its domestication?
- What challenges to the viability, achievability, and sustainability of the utopian design in its learning ecology emerge for observation over multiple time scales?
- What can we learn from the failures to achieve and sustain a utopian design?

We examined the projects at two levels. *At the institutional level*, we analyzed the development of collaboration and partnership between an educational research institution and a community institution responsible for children. The two institutions must collectively envision, implement, and sustain an alternative prototype practice for the realization of an equitable and humane education system that supports dignity of and rich learning opportunities for all children and young people. In Case 1, the Change Laboratory method (Virkkunen & Newnhamn, 2013) was used to structure the collaboration. In Case 2, the successful enactment of the funds of knowledge (FOK) method served as a prototype to be modified in its application in a radically different

set of sociocultural circumstances. Case 3, using the utopian design principles of the project that gave rise to it, illustrates the process of rising to the specific concrete circumstances of the community where the activity takes place.

At the *organizational level*, one begins with envisioning and enacting a prototype practice, a model system of activity seeking to realize a utopian goal in the local setting. The second phase involves implementation of the prototype practice, which has been shown to have the desired effects for the participating population of children and youth and to fit, at least temporarily, with each institution's ongoing priorities in a new setting. This requires a redesign of the old prototype practice based on the principles as they are applied to the particularities of place and time. The third phase of the process demonstrates that the firefly can exist and shine light after the resources that enabled it to light up have been exhausted. If the system is successful in passing this hurdle, it becomes possible to observe the local reorganizations required to obtain new resources. A next developmental benchmark is whether the new system of activity can survive its initiator and the generation of people who put it together in the first place. A final consideration is whether an existing system gives rise to new variants, that is, offspring, that inhabit other parts of the social ecology.

Case 1. Fostering cultures of compassion in early childhood education

In this section, Antti Rajala examines the initial goal formation phase of a utopian methodological study[1] that strived to create a model of a compassionate kindergarten in an urban, culturally diverse neighborhood in Finland. The ideal of a compassionate kindergarten prefigures the utopian goal of an equitable and humane education system. This research can also be understood as utopian in the sense of reconfiguring the mundane actions of care and compassion among the kindergarten community "to express the deeper ends of their shared activity in the means, working to craft new relations in and through the process of enacting possible worlds" (Vossoughi & Booker, 2017, p. 228).

A prototype model of a compassionate kindergarten

The research began with a theoretical model of a compassionate kindergarten based on a cultures of compassion perspective (Lipponen et al., 2018). This perspective allows for examining the foundations that the practices of an educational organization create for compassionate and caring actions

[1]The staff members gave their informed consent to participate in the research project. This research project adheres to the ethical standards of scientific research of the Finnish National Board on Research Integrity.

among the kindergarten community. A central tenet of this perspective is the commitment to promoting equity through compassion, which is understood as a social phenomenon that "shapes and is shaped by conditions of inequality and coercion extending to the notion of social justice and solidarity" (Fotaki, 2015, p. 200). Another central tenet is a critical perspective on compassion, which focuses on acts that identify the systemic or institutional causes of suffering or unmet needs and then act to dismantle these root causes.

The Change Laboratory method was used to test and concretize the model. The Change Laboratory is a participatory method for promoting organizational change by involving the educators as central actors in goal formation, here by engaging them in questioning and analyzing the tensions and contradictions of their work and in envisioning alternative ways of reorganizing the activity (Engeström, 2011; Virkkunen & Newnhamn, 2013). Informed by extensive ethnographic data collection, five Change Laboratory intervention sessions were organized with the kindergarten staff over a period of 10 months.

Creating the conditions for centering on the utopian goal in the intervention

An emerging utopian methodology framework was adopted at the beginning of the intervention, and it reoriented the design and research approach to center on the utopian goal. First, the utopian methodology made the research group more reflexive regarding whose perspectives were centered in the goal formation process. Of special concern was the involvement of the Somali-speaking families, whose children formed the majority of the children in the kindergarten. The researchers documented instances of racism and negative stereotypes against Somali families and their children in the neighborhood and kindergarten. The research group intended to involve the families more centrally in the Change Laboratory but failed to achieve this, partially because of the reluctance of the kindergarten leadership and difficulties in finding the time for the sessions in the busy schedule of the kindergarten. The positionality of Antti and his colleagues as white researchers also became problematic regarding their attempts to gain the trust of some of the Somali families when organizing parent interviews.

The failure to centrally involve the Somali-speaking community in the goal formation process was mitigated to some extent when a Somalian-born staff member Nimco Noor was recruited into the research group. Her job in the kindergarten was to broker between the staff and the Arabic- and Somali-speaking parents, promote their participation in the kindergarten activities, and support their integration into Finnish society. On behalf of the research group, Nimco conducted the interviews with those Somali families that were

either reluctant to be interviewed by the other researchers or lacked a common language with them. Excerpts from the interviews were included in the material used in the Change Laboratory as a way to urge the staff to question their practices. At the request of the researchers, Nimco also took an active part in the Change Laboratory sessions. In these ways, the perspectives of these families could be mediated to stimulate the changes in the Change Laboratory.

Another way to center the utopian goal in the design process was to create the conditions for challenging the deficit perspectives about the children and their families that had been espoused by some of the educators. One strategy was to empower one of the teachers, Jaana (pseudonym), who appeared to share the utopian goal with the researchers. In a staff meeting that took place before the Change Laboratory, Jaana problematized the names of the kindergarten groups (Fieldnotes, March 11, 2019); the groups were named after the names of Native American tribes, which Jaana considered discriminatory. A key event facilitated by the researchers that appeared to embolden Jaana to speak up about racism in the Change Laboratory was a brief informal discussion in the corridor with Antti. Antti validated Jaana's initiative to change the kindergarten group names, here as an example of critical compassion, which the Change Laboratory sought to foster. This discussion appeared to generate trust in Jaana regarding the researchers' willingness to support her in questioning the discriminatory views of her colleagues.

The events in Change Laboratory Session 2 show how these efforts to center the utopian goal paid off. The goal of the session was to question and examine problems of practice. The session started by discussing the (mainly positive) feedback of the parents to the staff. The researchers then presented the participants with select examples of their views that had been taken from prior teacher interviews, in which they reflected on their difficulties in dealing with cultural diversity. Examples from the parent interviews were included, in which they shared experiences of unfair treatment in kindergarten and racism in the neighborhood.

During a small group activity among four (white) educators, Jaana shared her experiences of encountering racism among the staff members in the coffee room. She said that she seldom intervened in such incidents because she feared rejection by her colleagues. Jaana's group members supported her, and the discussion culminated in a collective agreement that there was everyday racism in the kindergarten. Jaana noted that some staff members espoused implicit racism, manifested as negative stereotypes and racialized talk about the children and their families. Others also expressed the difficulty of intervening in such situations.

When the small groups reconvened in a collective session, Jaana called out and named the problem of everyday racism. Jaana's statement was followed by a long pause, suggesting that raising the issue for discussion was against

conversational norms. Nevertheless, Jaana encouraged everyone in the room to critically examine their own attitudes toward racialized children and families. Antti supported Jaana's opening up by summarizing findings from recent research on racism in education. In her response, the vice principal defended the staff members' right to their own private views but emphasized that, in their professional role, they should abide by the organization's values. She defended the staff against the accusation of racism by emphasizing that the problematic talk could boil down to different ways that people interpret certain words.

Confronting the status quo of the kindergarten, the researchers nevertheless nominated everyday racism as a theme that would be worked on in the following sessions. In Session 3 (October 24, 2019), six pilots were launched to address the different aspects of the intended culture of compassion. The theme of everyday racism was included in one of the pilots, titled "equity plan." The equity plan was proposed as a means of eradicating the everyday racism that Jaana's group had documented. Jaana was selected as the leader of the pilot. The other pilots included topics such as developing a path of support to organize cooperation among the educators in supporting children who had difficulties, developing the tools to reorganize the cooperation between nurses and teachers, and implementing a pedagogical project with families to promote mutuality and strengthen relationships.

Domestication of the utopian goal

Once the pilot project to create the equity plan had been established, planning meetings were organized in which the idea was further developed. Everyday racism was discussed, but these discussions did not result in any concrete actions, apart from the idea of arranging a training session about the topic. An NGO specializing in antiracism was contacted, but eventually, the training was not arranged due to the COVID-19 pandemic.

Soon after this, the pandemic ended the Change Laboratory intervention prematurely. Nevertheless, the equity plan was eventually completed, but racism was not mentioned. At the end of the project, it became clear that there was not much progress in eradicating racism in the kindergarten. In a post intervention interview (June 17, 2019), Jaana commented that she still did not feel secure enough to interfere with the other staff members' racist comments. She noted that, in the goal formation phase, she had good chances to bring forth her critical views and discuss the topic with her colleagues, but when the work on the pilots started, she was left alone as her colleagues focused on their own pilots and forgot about the topic of everyday racism.

To sum up, this case managed to create the conditions to begin the formation of a shared utopian goal by centering on the perspectives of the Somali-speaking families, empowering critical voices among the educators in the kindergarten, and confronting the status quo by choosing to pursue the uncomfortable topic of racism within the community of educators. However, the researchers could not avoid the domestication of the utopian goal, and the topic of racism gradually faded away. However, some of the reasons for this were procedural in nature. By simultaneously pursuing all the key issues that were relevant concerns for the educators, the research group was left with too few resources to support Jaana between the Change Laboratory sessions, which created the fragmentation that she experienced. Given the endemic racism in the community and how it was enabled by the kindergarten leadership, the researchers failed to create a sense of safety that would have been needed to push back against the power dynamics that had silenced the critics. However, it is noteworthy that, initially, such safe dialogue space was opened, and the utopian effort gained some momentum.

Thus, the eradication of everyday racism, which was central for realizing the utopian goal of a humane and equitable kindergarten, eventually acquired relatively peripheral status in the overall intervention. Some of the reasons for this impasse can be traced to the constitution and division of labor in the research group. Antti worked as a postdoc and codirector of the research project, holding responsibility to lead the data collection and intervention in collaboration with four other researchers. The project principal investigator and coresearchers were supportive of and interested in Antti's engagement with the utopian methodology but also had other research interests. Retrospectively, it seems plausible to assume that framing the project in terms of a utopian methodology from the start and ensuring the whole project team's commitment to the realization of the utopian goal would have helped support the resistance against the power dynamics contributing to the domestication of the utopian goal.

Clearly, more emphasis should also have been given to positioning the pilot group working on antiracism as a way to build stronger connections with the other pilot groups so that the work of antiracism could be interwoven with the other aspects of the intervention. Ultimately, to pursue the utopian goal of creating racially just education systems, researchers should develop ways to contend with the root causes of the obstacles along the way. Although the idea of critical compassion was included in the theoretical toolkit of the cultures of compassion perspective, a central limitation of the theoretical tools offered to the staff members for analyzing the problems of their work was that they were colorblind in nature. Indeed, the analysis presented here and in some other studies of the research group (Kurian & Rajala, in press) calls for more explicit theorization of racialization and systemic racism in further theory development. The very notions of

compassion and care need to be racialized and politicized to account for the potentially harmful unintended consequences that even well-intentioned acts of compassion may have for racialized children and their families (De Royston et al., 2017).

Case 2. Funds of identity in Catalonia, Spain

In this section, Moises Esteban-Guitart examines what can be considered a second phase of utopian methodological research, namely the timescale of implementing a utopian design in a different sociohistorical and national context. The funds of identity (FoI) approach is a result of the implementation of the FoK project, which originated in Tucson, Arizona, in the early 1980s. Although not explicitly conceived of as a utopian methodology study, in retrospect, FoK and FoI can be seen as prefiguring the utopian goal of an equitable and humane education system that supports dignity and rich learning opportunities for all children and young people. Specifically, this section focuses on how a prototype model (i.e., FoK) that has been shown to be successful in one sociohistorical and cultural context in Arizona, US, was transformed when brought to a new sociohistorical and cultural context in Catalonia, Spain, starting in 2010.

The funds of knowledge approach

FoK is a prototype practice of the ideal relationship between students' households, communities, and classrooms; it involves the ideal of recognizing and legitimizing families' FoK and appropriating them into the classroom, prefiguring a caring and nonracist educational system in which the relations of mutual trust between teachers and families, along with the recognition of learners' voices, constitute a crucial binding agent of democratic schooling.

The concept of FoK refers to "the knowledge base a household has accumulated from the lived experiences and social practices of its members" (Moll & Spear-Ellinwood, 2012, p. 920). In practical terms, it is implemented as an afterschool project consisting of two major components: home visits by the teachers and "study groups," in which researchers and teachers prepare visits and discuss the ways to link classroom instruction to the resources and skills identified in the household visits carried out by teachers.

Initially, in the current research, the study groups provided a key setting in which FoK theory and methodology were applied. The study groups included studying the theory and methodology with the teachers, training the teachers in ethnography to carry out household visits to document families' FoK (receiving a template to conduct family interviews), and

designing educational activities based on previously identified FoK (Moll & Spear-Ellinwood, 2012).

The study group as a social context to implement, sustain, and regenerate a utopian design

Throughout its implementation in Catalonia (Spain), which began in 2010 and continues today, there have been several different study groups in the schools and institutes in the cities of Barcelona and Girona, both of which now have a very broad social and cultural diversity. Indeed, in 2020, 20% of the population originated in Morocco, Romania, and South America, but also from Europe and Asia. Consequently, what used to be a largely bilingual Catalan-Spanish society is becoming much more multilingual and multicultural, with more than two hundred different languages coexisting in the territory.

The study groups provided opportunities to evaluate and even transform the FoK approach in terms of adapting it to new circumstances. Indeed, two elements have been introduced progressively into the study groups in Catalonia, both of which are resonant with utopian methodology. During the first work session of the study groups, more emphasis was placed on explaining the goal of pedagogically recognizing students' identities and lived experiences. Second, a final session of the study group was developed to identify the approach's strengths, limitations, and areas for improvement (Esteban-Guitart et al., 2018).

Among other problems (Llopart et al., 2018), a methodological problem arose. Namely, it was impractical to extrapolate the specific form of FoK identified in one family across the other families. Notably, as was the case in the original application of the approach, visits are usually made to only two or three families per class; hence, identifying the type of FoK of all the families in the class was unrealistic. A further criticism of the FoK approach problematized its adult-centric view; that is, a great deal of attention is placed on the families and their collective knowledge and abilities, so there is little specific focus on the learners themselves. Consequently, it becomes necessary to incorporate learners more explicitly into the equation (Esteban-Guitart & Moll, 2014).

In response to these problems, the concept of FoI was conceived of as a set of resources essential for the students to define themselves in terms of what really matters for themselves. Indeed, it can be considered a strategic way to achieve the basic goals of FoK by inverting who and how to get the information about the students and their families. As an emergent prototype, FoI invites us to gain critical knowledge about learners, families, and communities through the concerns of the children manifested in their various representations. It is an innovation that enriches both the focus and unit of

analysis by considering not only the skills and knowledge of the families, but also the voices and experiences of the learners through the creation, for pedagogical purposes, of what are known as "identity artifacts" (Subero et al., 2018), which are multimodal productions, such as identity drawings, produced by the learners themselves, in which they project and visualize the aspects related to their needs, projects, interests, and identities. The teacher then uses these productions to connect the lives and experiences of the students with the curriculum and pedagogical objectives of the school.

Invisible funds of identity as a new prototype model to resist domestication

In developing the FoI model, persistent tensions were identified in the context of the study groups (in particular, in the self-assessment and self-criticism phases). In brief, the information we can gather from FoI consists, on the whole, of the explicit aspects of the learners, which can sometimes result in a rather superficial understanding of their practices and lived experiences, can reproduce tacitly racist, classist, and sexist ideologies. Addressing these tensions in the application of the model required further theoretical development to improve the educational design, here in line with the utopian goal.

The idea of invisible FoI can be considered a means to resist the domestication of FoI theory. Invisible FoI are defined as the prevailing/canonical practices, discourses, codes, and norms that may underlie the ideas, practices, behaviors, and meanings that people produce about themselves, although they may be unaware of them (Esteban-Guitart, in press).

The study by Marsh and Zhulamanova (2017), which involved a FoI intervention, provides a good illustration of our argument. Marsh and Zhulamanova (2017) pointed out some of the potential risks of incorporating children's FoI into the curriculum in the context of early childhood education. The teachers in their study group had initially identified "princesses" and "beauty" as areas of interest. However, concerns were soon raised that they might, in fact, simply be replicating racist, classist, and sexist ideologies (i.e., examples of invisible FoI). Consequently, they designed games and discussions that aimed to expand and problematize the Western notion of "princess." In this case, one teacher moved the discussion to the concept of gender as they attempted to identify the dominant discourses in relation to "being a princess" and "beauty" and to explore nondominant notions. The teacher eventually brought a book about a boy princess so that the children could see this was also acceptable.

In sum, over a period of one decade, the work on FoK and FoI models has evolved, and the initial educational model has been transformed. During this time, the FoK model, motivated by a utopian goal, has undergone a process

of regeneration (as FoI), domestication, and redefinition (as invisible FoI). In this process, self-criticism has been an engine for retheorizing and redesigning more contextually appropriate, sustainable, and equitable educational practices. Within this same process, the study groups—conceived of as an intercontextual mediation structure (Esteban-Guitart et al., 2018)—act as social spaces where mutual appropriation between university and school takes place, here as guided by a utopian goal. The educational practice designed because of the study group's work can be conceived as a prototype, that is, a new form of activity that seeks to analyze and illustrate a means of resolving a perceived deficiency in current practices, which, in this case, includes deficit thinking in education, misrecognition of students' FoI and families' FoK, and the lack of encouragement of the role of imagination and student agency. The utopian goal is a tool for collective imagination, thinking, and creation in the context of the study groups—a joint mediated activity involving researchers and teachers, the university, and the school—as its unit of analysis.

Case 3. Lessons of the long Duree: La Clase Magica

In this section, Mike Cole examines the afterschool club La Clase Magica (LCM) that was designed for Mexican-origin children who lived in a relatively small barrio in a prosperous, suburban, largely Anglo, and middle-class town in the US. The project emerged to address the failure of the ongoing 5thD utopian design project. Because of these origins, LCM used the utopian design features of its parent project, now redirected to serve the needs of children and families of the Mexican-origin community.

Because we wish to focus on events that occurred two decades after they first began, we present the origins and early development of Case 3 in a telescoped manner to focus on the critical threshold of surviving the departure of its initiator and its role in the development of a statewide network of adopter/adapters with international reach. We begin by briefly describing the events that motivated the project before then summarizing how it tailored the utopian design principles it shared with the 5thD utopian parent project from which it emerged to meet the needs of the Mexican-origin community. The result was a successful utopian project that, in the process of its development, became the germ cell for a large university collective of programs that had only been an impractical utopian dream until it, too, came to pass.

Common design principles, different communities

In seeking to create an alternative activity specifically created for Mexican-origin children, LCM shared several key features with the 5thD.

At the institutional level, these features included 1) a university academic unit that agrees with a community institution to create a model afterschool program for community children; 2) a common utopian goal: to cocreate, implement, and sustain a model activity as supplemental education for the local community's children and a model for providing undergraduates with serious theory-practice education as a part of the regular university curriculum; 3) make the challenge of sustainability an issue of ongoing reflection and action among those responsible for implementation; and 4) privilege diversity. A primary design concern was to create a program that would be attractive to and effective for children from marginalized communities, regardless of the causes of their marginalization, for whom ordinary schooling was failing.

LCM and the earlier implementation of the model at the local Youth Club shared all these values, but the failure of the Youth Club to attract barrio children required a different strategy—to create a place in the barrio that was near the children's homes where they would feel welcome and safe. That place was the mission of the local Catholic church, which was located in the barrio. At this level of the project, the major role assigned to and accepted by local parents and the insistence on a thoroughly bilingual cultural norm stood out in the redesign process. At the organizational level of the afterschool program itself, the activities at both sites were designed using the principles derived from the CHAT described elsewhere (Cole, 2006).

Addressing the failure of 5thD to engage the Mexican community

As described elsewhere (Cole, 2006), the Youth Club project from which LCM emerged was entering its third year of operation when LCM was first conceived and implemented. After a difficult two years during which they had struggled to maintain the core structure of their program, the 5thD at the Youth Club program was proving to be highly successful at engaging elementary and middle school-aged boys and girls of widely differing academic profiles and interests. However, it was failing one prominent group—the community's Latinx, mostly immigrant, children. It was not because of a lack of effort. The Youth Club staff, including a well-liked, local Latino staff member, were aware of the problem and committed to inclusion. They were supportive of several Latinx students in the university course who made a special project of visiting the children's homes to explain the activities and assure them that their children would be well taken care of. These efforts did not take hold.

As these efforts were underway, Olga Vasquez came to the University of California San Diego (UCSD) as a postdoc and then as a faculty member. Building on her personal experience as the daughter of farm worker, a classroom teacher, and researcher interested in bilingual/bicultural education, Olga took on the task of creating a new afterschool activity system specifically

designed for the needs of the children and their families residing in the local barrio.

Reformulating the utopian goal

Olga's goals and her strategy were made explicit from the start. The title of Olga's monograph about the first decade of LCM clearly states her utopian objective: *La clase mágica: Imagining optimal possibilities in a bilingual community of learners*. In her words, LCM was intended to create:

> … the *bidirectional* flow of cultural knowledge between two disparate and often hostile cultural systems, making real the possibility of greater understanding, integration, and equitable distribution of resources among and between each other. (Vasquez, 2013, emphasis added)

Her vision of the optimal system was a setting organized to enable a "reciprocal relations of exchange," in which "conventional and inflexible structures of domination in language, action, and knowledge are replaced with new conceptions of what counts as knowledge, who imparts it, and how and where it is distributed" (Vasquez, 2013). All these commitments provide ample evidence of the utopian nature of Olga's undertaking.

Creating the conditions for sustaining the utopian design over the long haul

Olga's initial challenge was to identify an organization within the local Mexican-origin barrio that could provide appropriate space and where local community members, both children and adults, could participate. Olga began her project by going to the Catholic mission, where she met with the priest and catechism teacher. The first sessions of LCM began with Olga and the catechism teacher, several elementary school children, a few UCSD students, three Apple II computers, and its own mythical entity, El Maga, a deliberate bilingual problematization of the Maga's identity. Initially, the participants gathered in the mission's chapel within the space before the altar. From these sparse beginnings, LCM gradually took root in the community and university.

By the turn of the millennium, LCM was prospering as part of a broadening of the 5thD project, of which it was a part. Over time, it gathered increasing support not only from the world of academia, but from an increasingly broad range of supporters in the local community.

Challenges to sustainability

At this point in its history, LCM confronted a challenge unique to its history. Olga, the initiator, retired. She had been preparing for the long-term survival

of LCM since the very beginning, focusing on members of the community who were both willing and able to organize the activities on site. As her retirement drew near, she began to focus on the organizational changes that would have to take place if LCM was to survive her departure. The long-term challenges were formidable with respect to both of her institutional sponsors —the university and community.

Regarding the required institutional changes, to replace a tenured faculty position, the faculty member's department would need to hire a person whose background and expertise were compatible with teaching the LCM-linked course each quarter, presumably a person with community-centered research interests. Both requirements run directly against university norms, where it is expected that new faculty will initiate their own research programs and where teaching is sharply distinguished from research. Finding such novelty and continuity in one person could happen in extraordinary circumstances, but such arrangements require a good deal of institutional rearranging.

With respect to the community side of the project, the task was equally daunting. Here, the challenge was to find or create an organization with the resources required to fulfill the community's obligations to a 50–50 partnership with its university partner, for example, by providing a local site coordinator, space, and equipment.

To meet the community's requirements, Olga and her community members created the Center for Academic and Social Advancement (CASA) as a nonprofit organization dedicated to supporting the community to take full responsibility for maintaining the partnership with UCSD. The income from grants obtained via CASA allowed LCM to expand its programming for middle school children to include preschoolers, youth, and their parents. Simultaneously, the LCM research team sought out and found additional organizations in the community for support. This success created the LCM—La Colonia de Eden Gardens (LCEG) collaboration, an essential first step in the process of sustaining the program.

Now, Olga had to confront the most difficult part of her task: to find a department at her university with a faculty member who could take on the course and partnership that it was a part of before she retired. With support from statewide University-Community Links directors, LCM and her partners began contacting UCSD administrators in search of a solution. Ultimately, they found a new faculty member in a different department who satisfied both of the university's key criteria: a person expert in community-centered higher education who also conducted community-based research. As a result, in 2019–2020, LCM emerged as a transformed organization with new partners, a new faculty member, and a new department with a unique blend of education, community development, and research.

At the time of writing this article, the generation implementing LCM in its new institutional configuration has weathered the challenge of the COVID-19 pandemic, which began two-thirds of the way through its first year. Its institutional foundations are stronger than ever; it has forged relations with several community sources of older, mentoring students, finding a home in an appropriate umbrella community organization. The reorganization at the university placed it in an educational studies department with administrative support dedicated to community-based student higher education, as well as an experienced researcher/teacher committed to Olga's original vision of LCM as an educational model (Vasquez, 2013). This revisioned organization also takes its strength from the decades of community outreach and local fundraising that have produced a large network of informally associated institutions with common interests (Underwood et al., 2021).

Discussion

In the current paper, we have discussed a utopian methodology as a mode of inquiry for designing, implementing, and sustaining institutional innovations as intermediate steps toward the realization of a utopian goal. In this final section, based on our theoretical argument and its enrichment through the analysis of three studies that have provided practical illustrations of critical phases/timescales of utopian methodological studies, we propose a tentative list of methodological principles we believe could guide the future pursuits of DBR to go beyond addressing incremental changes and strive to organize for seemingly impossible futures. Next, corresponding to each of the principles, we have synthesized the lessons learned from our investigation of the cases.

Some conditions for sustaining and regenerating the utopian goal should be explicitly considered

The first question that guided our analysis was as follows: *What conditions were created for envisioning, implementing, and sustaining the utopian design and for resisting its domestication?* The analysis of all three cases stresses the importance of attending to and balancing the difficult task of resisting domestication, on the one hand, while sustaining interventions, on the other hand. As the three cases show, the need to build conditions for sustaining the radical edge of the utopian designs was present at all time scales of the research, from initial envisioning the utopian model to sustaining it over decades.

Utopian designs are intended to challenge the existing power relations and status quo while transforming the institutions in which they are implemented (Gutiérrez et al., 2020; Sarason, 1990; Stetsenko, 2016). Creating the

conditions for sustaining the radical content of the utopian goal can be illustrated by reconsidering Tyack and Cuban's (1995) metaphor of a firefly. Our extension of the metaphor is less pessimistic than the original insect. We suggest that, in utopian methodology, you first create a firefly, and then, you seek to create a firefly that casts its light for as long as it is properly fed and cared for. In Case 1, the firefly was created in the form of the goal of eradicating racism. The research group managed to create sufficient conditions—such as creating connections with the Somali community—for the utopian goal to emerge, but it failed to sustain it against the process of domestication. Thus, the firefly was short lived. Case 2 shows how a firefly, which had been shown to be viable in specific sociohistorical circumstances, required multiple transformations when implemented in different geographical places and historical times. These transformations were enabled by the practices of self-assessment and self-criticism introduced in the study group format—a joint design activity involving researchers and teachers. Case 3 offers a rare glimpse into the process by which the durable firefly can be reproduced in new historical circumstances. The case demonstrates that although, as Adorno argued, a given project may become domesticated over time, its reproduction by new participants under new historical circumstances opens the possibility of renewing its utopian potential.

All three cases illustrate the importance of taking into account the changing sociohistorical contexts in creating the conditions for and evaluating the utopian designs for equity and learning. Designs that appear impossible to implement in the here and now may be possible in another place and another moment in time and vice versa (Wright, 2007). In the first case, the topic of everyday racism emerged at a historical moment when critical and antiracist perspectives on equity were becoming more common in educational research in Finland (Lehtomäki & Rajala, 2020). These perspectives were taken up by one of the teachers in Case 1, who was supported by other young educators who had been more exposed to the historically emerging ideas than their more senior colleagues. The analysis of Case 1 also underlines the importance of intensive ethnographic work and relationship building in the field to get access and attend to the emergent possibilities for centering the utopian goal formation. In Case 2, Moises started out by employing the methodology of a successful prior project and stumbled into the problem that the differing sociocultural context rendered precise replication of the model inappropriate. To address the critical contextual differences between the studies, and resolve the tensions that emerged in the study groups, the researchers came up with an effective way to achieve the same goals: reversing the focus of activities to focus on the children's interests. By focusing on the children's own concerns, they were able to understand the children's environments from their point of view. From this logical application of the model to fit the

constraints of its concrete circumstances grew an appreciation of the conditions of possibility for its predecessor. It simultaneously made visible the subjective side of the relationships that its model had less access to, here because of its own context. In Case 3, the strategy of creating multiple individualized versions of the initial model, each specifically designed by its local partners and each of which took a sustained partnership around shared goals as its premise, created enough durable programs that retained their distinctiveness to investigate the critical problems of how to design for diversity and longevity in a systematic manner. Theoretical inspiration from Adorno (1984) at a time when the 5thD project was running successfully provoked Mike and his colleagues to realize that they were writing at a utopian moment in the development of their own activity when the 5thD and LCM had given birth to a university system-wide adoption of the underlying utopian model (Brown & Cole, 2001) and to prepare for the difficult times that seemed sure to come, as they did.

Examine the recurring challenges to viability and achievability of the utopian design in its learning ecology that emerge for observation over multiple timescales

The second guiding question was as follows: *What challenges to the viability, achievability, and sustainability of the utopian design in its learning ecology emerge for observation over multiple time scales?* The time frames of each of the projects, when viewed in terms of their utopian goals, each allow the researchers to make some progress in terms of Wright's criteria—desirability, viability, and achievability. Our study suggests a fourth category—*sustainability*—as a central criterion for elaborating and evaluating utopias (cf. Wright, 2007). Only Case 3, because of its longevity, provided access to a pivotal moment in the process of sustainability. The case crossed the temporal boundary between a professional career and the life of the system that the professional participated in creating. As Barab and Squire (2004) pointed out, "If a researcher is intimately involved in the conceptualization, design, development, implementation, and researching of a pedagogical approach, then ensuring that researchers can make credible and trustworthy assertions is a challenge" (p. 10).

By crossing the line to a new generation with its own historical circumstances yet retaining the core principles of the system, the LCM example (and others we have not had space to include, Underwood et al., 2021) provides just the separation that Barab and Squire (2004) called for while penetrating into the temporally extended and changing social ecology that Cobb et al. called for in 2003. Hence, the meaning of sustainability has been expanded to include the critical transition of initiating the generation from persons to roles and the early buds of institutionalization.

Self-critique and collaborative redesign for a new iteration

The third guiding question was as follows: *What can we learn from the failures to achieve and sustain a utopian design?* The analysis of the three cases shows the importance of self-critique and an honest discussion of failures in the difficult balancing act of sustaining utopian designs and resisting their domestication and assimilation into the status quo. Case 1 taught us about the need to organize the design process and assemble all the resources and intervention activities to sustain the pursuit of the utopian goal while resisting its domestication. The failure analysis also pushed theory development to better account for the politicized and racialized aspects of care and compassion (see also De Royston et al., 2017; Kurian & Rajala in press). Regarding Case 2, what we can learn from the FoK and FoI failures to achieve and sustain a utopian design is the central role of cultural context in the design solution and its associated conceptual toolkit (i.e., FoK, FoI, invisible FoI, household visits, and identity artifacts) in an ongoing process of utopian design. This involves assuming the provisionality of our theories and praxis as researchers, along with the need for constant critical reconsideration of ideas, methods, and educational interventions because of their contingency, which depend on local, specific sociohistorical, cultural, and political circumstances. Regarding Case 3, at the time of writing this article, LCM has yet to fail, although the ravages of COVID-19 have required heroic efforts to hold the structure together, despite seismic changes in the conduct of everyday life. Re-embedding itself in the community via a well-established community organization with a common focus on local youth and families and secure (for now, always for now) in the dedication of its UCSD faculty commitment, LCM provides an exception that proves the rule. At the same time, it serves as a model for other institutions of higher learning confronting similar problems of marginalization and exclusion in the US and abroad (Underwood et al., 2021).

As educational settings appear intractable to change, failures are inevitable and even predictable (Brown & Cole, 2001; Levitas, 2013; Sarason, 1990). We hope to have shown that failure analysis and exhaustive self-criticism are also crucial because the utopian goal should not be seen as a fixed blueprint but instead as reflexive, provisional, contingent, and dialogical explorations of the possible contents and contexts of human flourishing.

Conclusion

Taken as an ensemble, the cases briefly described here illustrate the broad usefulness of the utopian methodology proposed. Utopian methodology offers a way to maintain the firefly's light and challenge the domestication processes that must be overcome in any process of change and

transformation of the status quo. Even the earliest stages of a project that lasts for only a few months or one and that confronts an unforeseen social ecology by inverting its prior methods can provide critical, if incomplete, information about future challenges to successful implementation. Although efforts to create and sustain new forms of educational activity might fail, when applied as a tool of DBR research, such projects provide a crucial means through which to deepen our understanding of both the designed activity and its changing relationship to sociocultural ecology, which is a fundamental goal of DBR research (Cobb et al., 2003). When pursued as a long-term commitment, the pattern of successes and failures provides a deeper understanding of the social forces at work and an empirical basis for critiques of both the forces that constrain us and our own theorizing—essential goals in constructing theory and planning the next steps of inquiry. Finally, the utopian methodology should pay attention to the practices of our work as researchers and research groups. How can we reconfigure our actions and reorganize our relations with each other in our everyday work as researchers and human beings to prefigure the utopian futures we aim to create through our research?

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