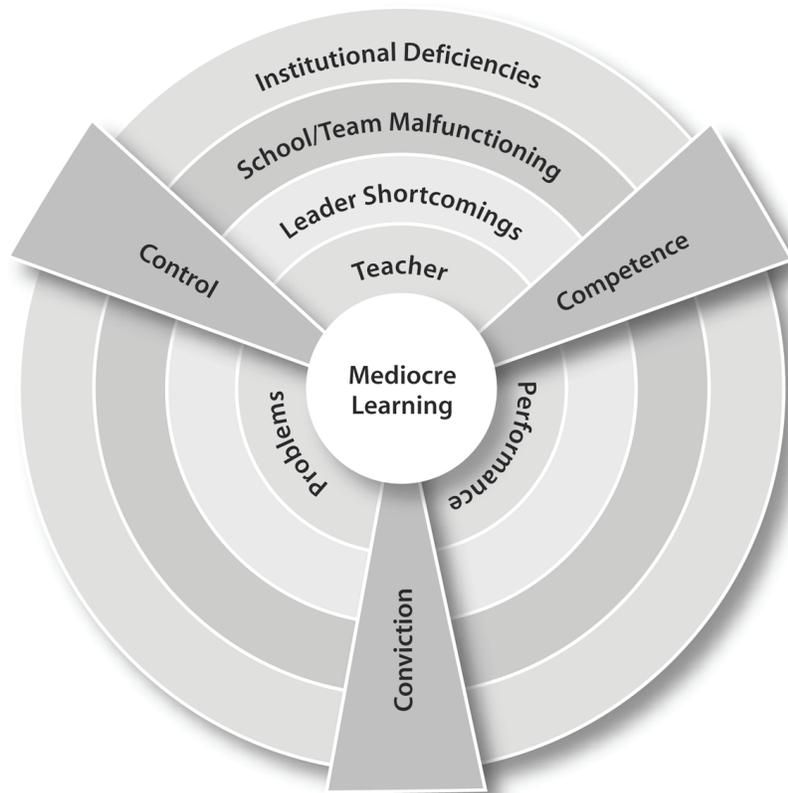


The Skillful Leader II Resource Kit

Building Leaders and Accountable Communities



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The Skillful Leader II is a three-day course based on the book *The Skillful Leader II: Confronting Conditions That Undermine Learning* (2008) by Alexander D. Platt, Caroline E. Tripp, Robert G. Fraser, James R. Warnock, and Rachel E. Curtis (Ready About Press). The course handouts are provided in conjunction with RBT professional development programs. They are not sold separately.



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Jump-Starting Ideas...

Locations of Resources for Helping Groups

Reference: *The Skillful Leader II: Confronting Conditions That Undermine Learning (TSLII)*

Where	What	Comments
TSLII	Chapter 4: Community Building 101: Setting the Stage	Provides “starter” strategies and ways to think about what leaders should say/do. If groups are functioning moderately well, these ideas will be of limited use.
	Chapter 5: Challenging and Changing Malfunctioning Groups	Suggests specific strategies to address teams or schools diagnosed as toxic, laissez-faire, or congenial. Even if a case does not fit exactly, leaders will want to examine the skillful leader responses for the sample teams to see what strategies might also be appropriate for their own settings.
www.RBTeach.com	Go to Videos section: PLC Content Teams/Error Analysis and Targeted Re- Teaching	A presentation by Jon Saphier on error analysis as a tool to help teams get to effective classroom action and an example of a secondary team implementing error analysis.
www.nsrharmony.org	Go to Resources and click on protocols	Provides many field-tested protocols for helping groups organize their effort, sorted by purpose such as Learning from Work, Learning from Dilemmas, etc.
Patterson, K., et. al. <i>Crucial Conversations</i> , McGraw Hill, 2005.	Particularly Chapters 1-8	Important for groups/group leaders struggling with team members who do not make or keep commitments to action. Gives easy-to-read guidelines for saying what needs to be said while maintaining relationship.
Scott, S. <i>Fierce Conversations</i> , Berkley Books, 2002.	Whole book	Good resource for whole groups as well as team leaders who need to move from congenial to collaborative or collaborative to accountable.
Lencioni, P. <i>The Five Dysfunctions of a Team: A Leadership Fable</i> , Jossey-Bass, 2002.	Whole book or see workbook of the same name	The classic for getting teams thinking together about what they want to accomplish and what might be getting in their way.



Jump Starting Ideas...

The 3 C's

Conviction: *Starting here makes sense when adults are discouraged or do not share common beliefs or a vision of the potential power of good teaching and the value of collaboration; it helps give people courage to tackle seemingly intractable student performance problems.*

Competence: *Usually the highest leverage starting point; many newly formed or reorganized groups need knowledge and skills that are different from those they use alone in their classrooms in order to function as effectively as possible.*

- Do a trust check; if necessary design trust-building interventions (see *The Skillful Leader II*, pp. 64-70).
- **Establish and enforce norms.**
- **Help teams examine and discuss the characteristics of effective teamwork and then participate in self-assessment and goal-setting activities using those characteristics** (see samples in this packet).
- Provide a menu of protocols and problem-solving structures to help groups focus their analysis and monitor the flow of conversation about a particular question or issue (see *The Skillful Leader II*, pp. 201-208 and www.nsrffharmony.org).
- Find or get expert help to identify resources to help teachers design or adapt appropriate formative assessments; encourage groups to field-test their tools, take one another's assessments and identify issues, and conduct error analysis sessions on student responses (see *The Skillful Leader II*, pp. 207-208).
- Provide professional development and/or professional readings and study groups on talking about difficult issues successfully (use the Save the Last Word for Me protocol at www.nsrffharmony.org).



Control: *A good starting point if you have not yet provided sufficient technical or structural support—or if you suspect that teams have not mastered the basics of meetings.*

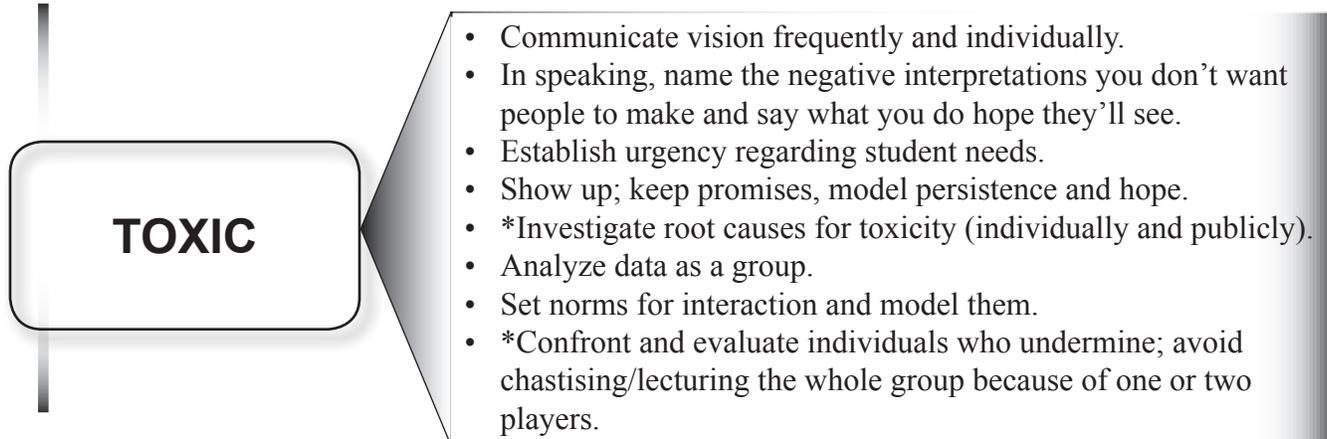
- Provide appropriate space to meet, keep work in progress posted, store materials and data, etc. (a leadership room).
- Arrange for coverage or offer coverage so team members can observe students or one another.
- Arrange for technology resources/coaching/support to allow members to share strategies, data, questions, etc. easily—particularly if face-to-face time is at a premium.
- Help groups establish one or two clear priorities and officially “take things off the plate” that are diverting attention and not likely to help the team make immediate progress in helping students.
- **Model/practice good “Big Picture” framing structures in all meetings involving faculty, e.g.,**
 - Create and distribute agendas in advance and include meeting objectives and itinerary with time estimates.
 - Establish and communicate purposes for meetings or agenda items within meetings (see Purposes for Meetings in the Resource Kit).
 - Include and protect time for summarizing meeting agreements and take-aways (implement the Last 5 Minutes guarantee).



Jump Starting Ideas...

Most Successful Ideas If You Know the Group Is Toxic · Laissez-Faire · Congenial

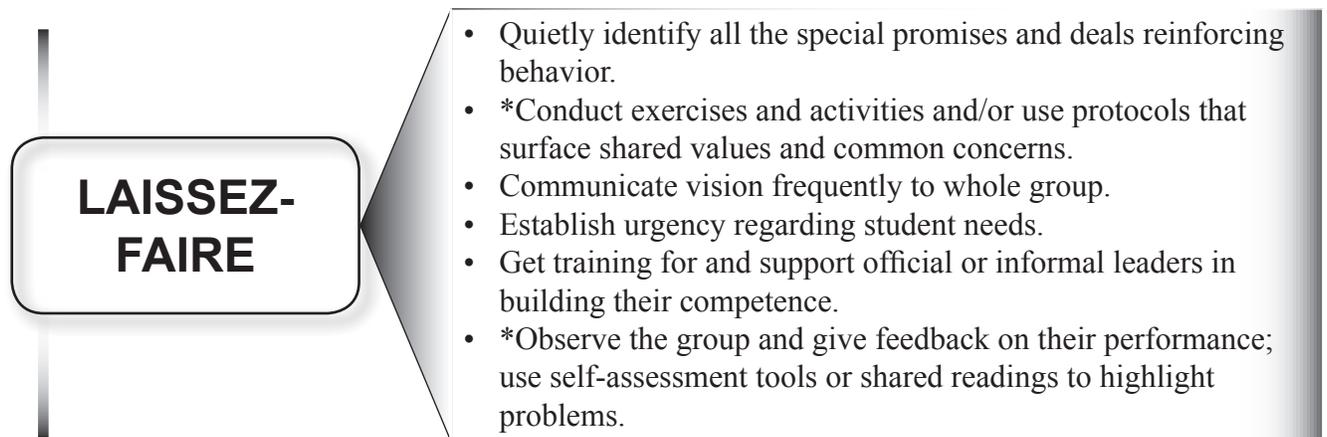
Expect fear or discomfort with change and diagnose cause of major concerns:



*Consider transferring the worst offenders

- ✓ Don't feed the cynicism with manipulative behavior, broken promises, outbursts of anger, or autocratic behavior.
- ✓ Don't let yourself be bullied by loudmouths.
- ✓ Don't lose your sense of humor, sleep, or outside support group.

Expect fear or discomfort with change and diagnose cause of major concerns:

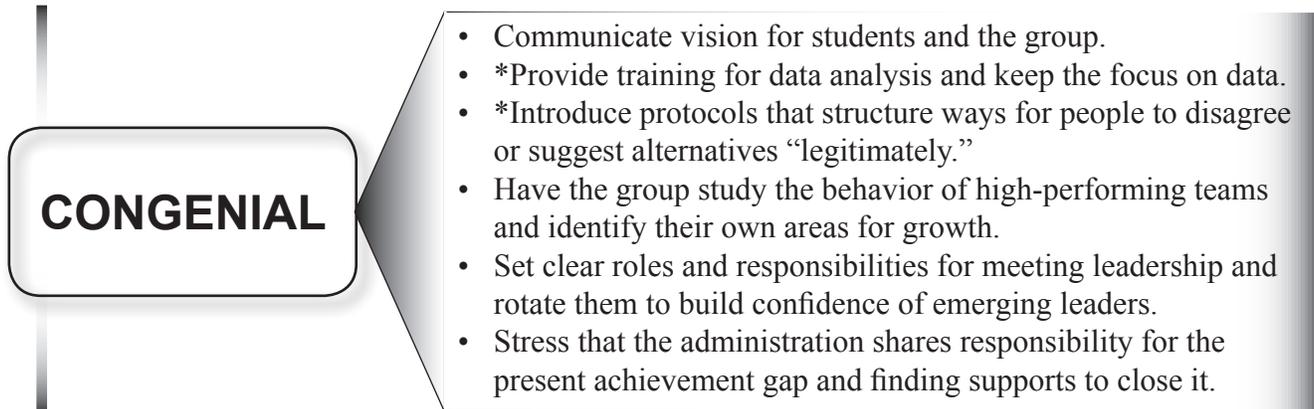


*Set short-term goals for student achievement, get commitments to action, monitor commitments

- ✓ Don't negotiate any individual deals or special privileges that will undermine your message about your belief in the power of collaboration.
- ✓ Don't respond to the problem of individual fiefdoms by taking away all autonomous decision-making or requiring total consistency and compliance; pick your battles at first.
- ✓ Don't give in to the temptation to delegate and take others' words for how the group is working unless you have lots of data to corroborate that assessment.



Expect fear or discomfort with change and diagnose cause of major concerns:



*Publicly note and reward members’ support of one another’s classroom efforts

- ✓ Don’t allow parking lot conversations or whispered confessions about who’s “upset and uncomfortable” to derail forward movement.
- ✓ Don’t ignore the group once you have it started and assume that ease of interaction assures that they will work productively on student issues.
- ✓ Don’t “pile on” a whole series of mandates before the group has had success in tackling something slightly controversial without “falling apart.”



Jump Starting Ideas...

Ideas Matched to Profiles

1. **The Carefrees:** High passivity; disconnected from larger purposes of schooling; little or no conflict; low expectations
2. **The Hatfields and McCoys:** Group with an unhealthy level of conflict
3. **The Compliers**
 - Version A: **The Smoothies:** Team is going through the motions of interaction; members feel high satisfaction for little action
 - Version B: **The Stuckers:** “We’ve done that. We can do it again.”
4. **The Wanderers:** Leaderless group
5. **The Settlers:** Look good, sound good, but carry light loads
6. **The Self-Governors:** Soloist at heart
7. **The Foggers:** Team with a poor organizational structure



Rating Team Capacity

Team/Dept.: _____ Other: _____

Rate each numbered indicator of capacity below as follows:

- 4** This capacity is totally in place.
- 3** This capacity is emerging and improving steadily.
- 2** This capacity is not in place, is weak, or is inconsistent.
- 1** This capacity is totally absent.

Conviction

1. Belief in ability to learn

The behavior of all members during meetings and in the classroom demonstrates strong, shared beliefs that

- | | | | | |
|--|---|---|---|---|
| a) with good teaching, all students can improve their achievement | 4 | 3 | 2 | 1 |
| b) intelligence can be developed through hard work and use of strategies | 4 | 3 | 2 | 1 |
| c) effective collaboration helps adults perform at higher levels | 4 | 3 | 2 | 1 |

2. Development of expertise

All members take responsibility for contributing to group knowledge, skills, and understanding at different points during the year. 4 3 2 1

Members do not allow one another to decline using practices that would be of significant help to students. 4 3 2 1

3. Importance of forgoing individual autonomy to honor collective commitments

Individuals in the group have shown themselves to be willing to sacrifice some measure of classroom autonomy and to try new approaches for the good of students as evidenced by

- | | | | | |
|--|---|---|---|---|
| a) meetings or problem-solving sessions that lead to common agreements about what will happen in all of the members' classrooms | 4 | 3 | 2 | 1 |
| b) members openly expressing or affirming a commitment to try new ideas despite their concerns, beliefs about the results of prior experiments, or fear of failure | 4 | 3 | 2 | 1 |
| c) members identifying changes they have made or ideas they have adopted as a result of common agreements | 4 | 3 | 2 | 1 |

4. Ownership and responsibility for results

Members' actions routinely communicate an acceptance of responsibility for student performance and a willingness to do "whatever it takes" to help students become more responsible and accountable. 4 3 2 1



5. Urgency and hope

Members regularly express a sense of “time running out” for students. Group problem-solving leads to higher expectations and more academic rigor for all students. 4 3 2 1

Competence**1. Finding and responding to the right student-learning problems**

The group invests collaborative effort on complex challenges and high-impact work. 4 3 2 1

The group deals effectively with students who have not yet learned; they have designed and use “early warning” systems to identify students who struggle. 4 3 2 1

The group employs coherent, mutually understood processes to define and solve problems that include

a) selecting protocols or case-study procedures that allow members to ask for and provide ideas and assistance in addressing student-learning problems 4 3 2 1

b) using benchmarks, formative assessments, and other student performance data to determine where students are not meeting important standards 4 3 2 1

c) using a range of strategies to verify causes of student difficulties 4 3 2 1

2. Using standards and data

The group uses learning standards, benchmarks, and student achievement data to identify where/how to invest effort effectively. 4 3 2 1

The group generates its own internal data from multiple sources such as classroom assessments, observations of students, interviews with students and parents, error analysis, etc. to supplement external test data. 4 3 2 1

3. Dealing with conflict

Behavior during collaborative interactions indicates that the group is able to

a) disagree respectfully but directly when doing so is necessary to get better understanding of a situation or better solutions to problems 4 3 2 1

b) confront the silent “elephants” that are interfering with helping students 4 3 2 1

c) surface hard-to-face facts and feelings 4 3 2 1



4. Establishing and enforcing norms				
The group has developed and posted norms of interaction and periodically monitors how well they are honoring those norms.	4	3	2	1
5. Sustaining transparency				
The group makes classroom practice open to public viewing through walks, team observations, and peer observations.	4	3	2	1
The group allows colleagues to critique written work and/or classroom or leadership decisions.	4	3	2	1
6. Constant learning				
The group regularly examines and makes changes in instructional practice.	4	3	2	1
The group identifies and drops practices that are not working.	4	3	2	1
Control				
1. Common planning time				
The group has meeting/planning time dedicated to problem-solving around teaching and learning available during the contract day/year.	4	3	2	1
The group uses whatever contracted planning time is available wisely and efficiently.	4	3	2	1
2. Space				
The group has a meeting space that is conducive to face-to-face conversations and contains appropriate materials to support adult learning.	4	3	2	1
3. Technology				
The group uses technology effectively to pool ideas, share strategies and data, create materials for students, communicate between meetings, etc.	4	3	2	1
4. Agendas and roles				
Meeting agendas are consistently well prepared (and communicated) in advance.	4	3	2	1
Leadership roles (e.g., facilitator, note taker, timer, etc.) are designated and used effectively to manage meeting time and follow-up work.	4	3	2	1
5. Monitoring systems				
The school has and uses systems for assessing group work (e.g. self-assessments, administrator observations, document reviews, and feedback).	4	3	2	1



Survey of Community Competence

Supplement to *The Skillful Leader II: Confronting Conditions That Undermine Learning* (2008)

Step 1: Individually assign a rating to each indicator under the specific competencies below using the following scale:

- 1 Absent or rarely part of our practice (I/We can cite no examples)
- 2 Occasional part of our practice (I/We can cite one or two recent examples)
- 3 Embedded and regular part of our practice (I/We can cite many recent examples)

Step 2: As a team, compare and discuss your responses until you reach a consensus on a rating for each indicator. Make sure members can cite specific examples to justify the rating.

Step 3: Agree upon competencies that you want to designate as goals for community growth or as target areas for additional monitoring and data collection.

Response to Student-Learning Problems

- _____ Most of our time is spent identifying and solving problems of student learning.
- _____ We use mutually understood processes or protocols to define and solve problems.
- _____ When we deliberate, we define the learning problem before moving to solutions.
- _____ We deal effectively with students who have not learned.
- _____ We begin each meeting by soliciting feedback from each member on the action taken and his/her success in closing the gap on the identified problem.
- _____ We present case study problems to one another in order to get assistance and learn from others' experiences.

Using Standards and Data

- _____ We use learning standards, benchmarks, and student achievement data to point out where we should invest effort.
- _____ We develop, implement, and report locally designed formative assessments to supplement external test data.
- _____ We avoid “paralysis through analysis” of data and move instead to taking action.

Dealing with Conflict

- _____ We know how to disagree respectfully but directly during the meeting—and do so as necessary to get a better solution to problems.
- _____ We surface hard-to-face facts and feelings. We confront the silent “elephants.”
- _____ We identify and drop practices that are not working.

Establishing and Enforcing Norms

- _____ We have developed and publicly post our norms of interaction.
- _____ We periodically monitor how we are doing at honoring our norms.
- _____ We revisit and revise our norms.



Sustaining Transparency

_____ We make classroom practice open to public viewing through walks, team observations, and peer observations.

_____ We allow colleagues to critique our written work and/or classroom or leadership decisions.

Constant Learning

_____ As a result of our collaboration, we regularly examine and make changes in our individual instructional practice.

_____ We regularly monitor our efforts by asking, “What is working? What needs revision? What could be better done outside of collaboration time?”



Pet Peeves Regarding Group Work

Directions: Please rate the following peeves according to the degree to which they annoy you or represent an ongoing irritant in your work setting:

- 2** For your biggest peeves
- 1** For those that are less bothersome
- 0** For any circumstances that rarely or never occur in your experiences with groups

This survey can be compiled by a facilitator as a starting point for setting norms or assessing group process.

- _____ 1. Meandering, unfocused “conversations” that never seem to get to a clear plan of action or don’t apply to my work
- _____ 2. Conflict of any kind between group members
- _____ 3. Never knowing or agreeing on agendas for meetings ahead of time
- _____ 4. People who do a lot of nonverbal or verbal squashing or ignoring of ideas (e.g., eye-rolling, moving on without acknowledgement) without ever really explaining or listening to others’ points of view
- _____ 5. Not sticking to agreed-upon agendas
- _____ 6. Individuals who waste group time with storytelling, pontificating, or “nay-saying” instead of thoughtful questions or suggestions
- _____ 7. Individuals who pull inward, “clam up,” and do not participate
- _____ 8. Individuals who do not hold up their end of a team agreement (e.g., don’t do what they promised to do or come without what they promised to bring)
- _____ 9. Leaders who try to manipulate a group into “choosing” something they have already decided to do
- _____ 10. People who complain in the “parking lot” but not in the meeting
- _____ 11. Taking time to get everyone to express their ideas and get on board with a plan instead of just telling people, “This is what needs to happen tomorrow!”
- _____ 12. Unclear expectations from administrators
- _____ 13. Spending hours planning something only to find out that the administrators do not approve, can’t get it done, have other priorities, etc.
- _____ 14. Other (list any pet peeves not listed above and be prepared to explain them)



Moving Groups from Collaborative to Accountable

Directions: Please rate your performance as a leader as you work toward moving groups from collaborative to accountable:

- 4 I work at this consistently and expend significant time on it.
- 3 I put some time into this but am not yet consistent and strategic.
- 2 I know I should do this but find almost everything else takes priority.
- 1 I do not have this on my current radar screen.

As a leader, I	4	3	2	1
1. Tell groups exactly why their work together as a professional community is important and how I expect the school to reap the benefits				
2. Communicate a clear vision of what good teamwork would look like and criteria teams can use to self-assess				
3. Think about and tell team members what I think their current expertise is and how I hope they'll use it				
4. Make sure groups have access to—and use—all available data about their students				
5. Look for and model protocols and processes that will help groups tackle problems efficiently—or enlist others' help in doing so				
6. Observe the team in action and give feedback to the group as a whole and to individuals				
7. Ask team members to reflect on difficulties they have faced—or continue to face—in trying to balance their own goals and preferences with team agreements				
8. Ask teams to report on and have me observe changes in classroom practice that result from their problem-solving				
9. Work to eliminate barriers to implementing problem solutions or to finding resources to support new approaches				
10. Include in performance evaluations individuals' contributions to their PLCs.				



Team Assessment

Directions: Use the scale below to indicate how each statement applies to the team you have selected as your focus of efforts for next year. Be sure to evaluate the statements honestly and without over-thinking your answers.

3 = Usually

2 = Sometimes

1 = Rarely

- _____ 1. Team members are passionate and unguarded in their discussion of issues.
- _____ 2. Team members call out one another's deficiencies or unproductive behaviors.
- _____ 3. Team members know what their peers are working on and how they contribute to the collective good of the team.
- _____ 4. Team members quickly and genuinely apologize to one another when they say or do something inappropriate or possibly damaging to the team.
- _____ 5. Team members willingly make sacrifices (such as budget, turf, head count) in their departments or areas of expertise for the good of the team.
- _____ 6. Team members openly admit their weaknesses and mistakes.
- _____ 7. Team meetings are compelling and not boring.
- _____ 8. Team members leave meetings confident that their peers are completely committed to the decisions agreed upon during the meeting, even if there was initial disagreement.
- _____ 9. Morale is significantly affected by the failure to achieve team goals.
- _____ 10. During team meetings, the most important and most difficult issues are put on the table to be resolved.
- _____ 11. Team members are deeply concerned about the prospect of letting down their peers.
- _____ 12. Team members know about one another's personal lives and are comfortable discussing them.
- _____ 13. Team members end discussions with clear and specific resolutions and calls to action.
- _____ 14. Team members challenge one another about their plans and approaches.
- _____ 15. Team members are slow to seek credit for their own contributions but quick to point out those of others.

From P. Lencioni, *Overcoming the Five Dysfunctions of a Team: A Field Guide for Leaders, Managers, and Facilitators*, San Francisco: Jossey-Bass, 2005, pp. 116-117.



Time and Task Analysis for Accountable Communities

Productive Use of Time and Productive Tasks for Grade Level/Subject Teams

“Time Is a Currency We Spend”

Directions: Please rate the statements below according to the amount of productive time spent on each task:

- 0** No time spent on this task.
- 1** A nod and a wink but not much time spent on this task.
- 2** We have spent some time on this task.
- 3** This task constitutes a major commitment of time.

- _____ 1. Figuring out the precise alignment between curriculum materials, state standards,, and local tests
- _____ 2. Coming to agreement about 8-10 learning expectations for the students, i.e., what they are and what they really mean
- _____ 3. Coming to agreement about criteria for student work and exemplars that score 1, 2, 3, and 4 to get reliability on how team members score student work
- _____ 4. Unpacking standards to establish team calibration of the exact “teach to” and “look for’s”
- _____ 5. Making up a common diagnostic task for students to do; then analyzing how the students did and planning reteaching together for those who need it
- _____ 6. Doing error analysis of student work for intervention and reteaching
- _____ 7. Collaboratively designing how to reteach a certain concept or skill
- _____ 8. Planning lessons together to dig deeply into the content for concepts, sub-concepts, possible misconceptions, and evidence of learning to look for
- _____ 9. Designing common final exams or products and common interim assessments
- _____ 10. Doing “lesson-study” together, i.e., one member presenting and other members observing the delivery of a jointly planned lesson
- _____ 11. Structuring interaction by adopting protocols that organize problem-solving
- _____ 12. Conducting walks or examining videotapes of colleagues’ lesson followed by feedback to the teacher(s)
- _____ 13. Being transparent about and reflecting on poor results, asking colleagues for help in teaching particularly difficult concepts, learning new strategies, and asking others to give feedback on implementation



Leading Meetings...

Purposes for Meetings

Why are we here? What's expected of us?

Problem-Solving (“something needs to change”)

Includes such activities as . . .

- problem (or challenge) finding
- problem identification
- problem defining
- brainstorming
- analysis of data
- evaluation of alternatives
- evaluating outcomes/results

Planning (“future-oriented problem-solving”)

Includes such activities as . . .

- working out short-term logistics for immediate needs or events
- designing long-range policies, procedures, programs, etc.

Decision-Making (“choosing between previously developed alternatives”)

Includes such activities as . . .

- setting/reviewing goals
- setting criteria
- evaluating alternatives
- weighting, ranking, setting priorities

Feedback/Advice

Includes such activities as . . .

- responding to drafts and proposals
- suggesting strategies for implementation
- anticipating needs and confusion

Reporting and Presenting (“feed forward”)

Includes such activities as . . .

- reviewing, introducing, giving overviews, “kicking off”
- lecturing
- small-group progress reports or updates with no action required

Adapted from M. Doyle & D. Strauss, *How to Make Meetings Work!*, New York: Jove Press, 1986.



Leading Meetings...

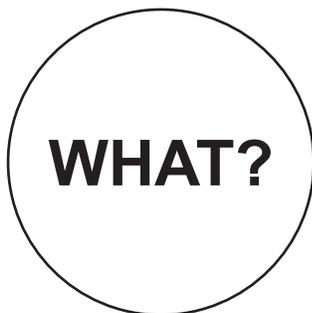
Getting Ready Before the Meeting



- **What's the purpose? i.e.,**
 - *Problem-solving*
 - *Planning*
 - *Decision-making*
 - *Feedback/advice*
 - *Reporting and presenting*
- What are the outcomes needed?
- Is this the best investment of resources (people, time, money)?
- Can this purpose be accomplished in some other way?

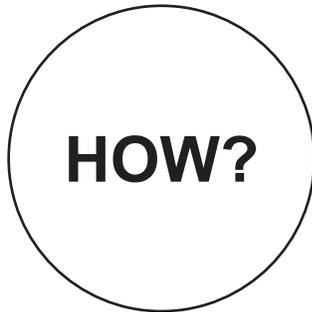


- **Who are the players who need to be involved and why?**
- What are the player's stakes and stances? I.e., *How are the outcomes likely to affect them? Where have they stood on this issue in the past? What goals and values have they expressed—or are they likely to pursue? Are the agenda items "high stakes" or "low stakes" emotionally and professionally?*
- What potential personality type, role imbalance, cultural preference, gender, etc. issues do I need to pay attention to and plan for in order to make everyone feel safe and included?
- Who should/will lead? facilitate? record?
- Who is responsible for what items or processes?



- To get to the desired outcomes:**
- What items need to be on the agenda—and in what order?
 - What kinds of structures and processes will be needed?
 - What kind of information and preparation will participants need?
 - What resources will be needed?





- How much time will be needed?
- How will the agenda be presented?
- When and how will it be communicated?
- How will space be arranged?
- How will we pay attention to safety and participation?

After the Meeting

- Get feedback on the process.
- Identify next steps and who will take them.
- Publish/distribute the minutes.
- Begin to plan the next meeting.



Leading Meetings...

During the Meeting

Important to Do	Strategies to Try
<p>Have clearly defined and assigned roles and responsibilities, e.g.:</p> <ul style="list-style-type: none"> • Leader (“runs” the meeting or item) • Facilitator (responsible for process, norms, participation, etc.) • Timekeeper • Recorder 	<p>Rotate role assignments</p> <ul style="list-style-type: none"> • Agree upon in advance • Print on agenda • Use table tents or fun signals, props <p>Publicly chart/record.</p> <p>Periodically assess of roles.</p>
<p>Start—and end—on time.</p>	<p>To handle the chronically late:</p> <ul style="list-style-type: none"> • Publish the agenda well in advance. • Put important or most gripping items up front. • Assign the leadership role to the worst offender and ask him/her to be present to check on all arrangements 30 minutes in advance. • Consider a sponge activity (but not reporting out) if you must have everyone present for a decision. • Experiment with a buddy system.
<p>Review and/or clarify outcomes(s) and agenda at the beginning of the meeting.</p> <p>Check agenda with participants and have a strategy ready to handle suggested changes.</p>	<p>Try charts called “Parking Lots” that acknowledge items and ideas and save them for future agendas whenever possible.</p> <p>Try question/suggestion cards.</p> <p>Solicit permission of planners and/or participants to change the agenda.</p>
<p>Plan and use introductions, warm-ups, and activators to help get everyone involved and comfortable in speaking early in the meeting.</p>	<p>Go with small groups, pairs, and content activators if the group knows one another well; consider ice-breakers that let people make some personal contact if they do not know one another or if there is significant role disparity.</p>
<p>Establish/review or revisit norms of participation, i.e., ground rules for meetings involving problem-solving, decision-making, or feedback particularly.</p>	<p>Refer to Norm Development Handbook.</p> <p>If the group is a standing one, consider posting or laminating the norms.</p>



Important to Do	Strategies to Try
Stick to the timelines; support the facilitator and/or timekeeper.	If the group has no time-conscious members, consider props or electronic aids like timers and very large clocks.
Protect the group from dominant members who seek to railroad ideas or shut down discussion.	Experiment with participation chits if all else fails; once an individual has spent his/her chits, s/he must wait until all others have had an opportunity to spend theirs as well.
Respect silences if they signal thinking; check on silences if the reason for them is not clear.	Give different learning styles the time and space to process. Experiment with groupings, stretches, etc. that help people stay on task.
Get written feedback/data as well as oral.	Experiment with Post-its, small cards, spend-a-dot structures that allow individual members to register their opinions without “taking on” a powerful voice each time.
Ask for a summary or check on agreements and further questions after each item if the meeting is a long one or many points of view have been expressed and noted.	Use charts or large type projected note-taking to make records of who has said what public and available to all participants. Put agreements in writing wherever possible. When time is short and one or two people still need reassurance, note concerns that may still need to be addressed and record the way in which the plan will be checked or the time at which the issue will be revisited.
Identify action items, next steps, person responsible.	



Using A Problem-Solving Process

STEP ONE: Identify the Problem

A. Say what the goal is, i.e., what it will look like, sound like, be like if the problem is solved or what you want the outcome to be. *Do not offer your favorite solution as a problem statement.*

OR

Express the problem as a question: e.g., How might we increase the rate and quality of oral participation in science classes in order to help students explore their own thinking?

Good Problem Identification Statements	Bad Problem Identification Statements (aka solution in disguise)
We will reduce the number of 7th and 8th grade students who come to class unprepared (as defined by homework not completed, + not having materials) to under 10% of the total grade enrollment	We need a grading policy that punishes kids who come unprepared.
Students who need extra, targeted short term help will regularly take advantage of school based opportunities to get that help	We need to start an after-school homework club.
We will each end up with 1.5 uninterrupted hours for math instruction each day.	We need to change the specialists schedules so they can't pull anyone out during math block.
Fourth grade students will be able to talk themselves through and successfully tackle math problems when they encounter vocabulary or formats that are unfamiliar.	We need a computerized practice program that challenges kids to deal with problems in different formats.

B. Get the full picture out on the table. Collect facts and about the problem—and all the questions you have about it. Every idea counts. Postpone judgments and do not allow “clarifications” or argument about what anyone “knows”. Perceptions are important; everything counts at this stage. *Do not propose solutions.*

Know	Need to Know

C. If you discover multiple issues or several possible definitions, break the problem into parts.



STEP TWO: Brainstorm/Generate Multiple Approaches or Potential Solutions

As a group, brainstorm (without evaluation or self-censorship) as many different potential ways to solve all or part of the problem as possible. Strive for volume, variety, creativity. Wacky or way out suggestions sometimes stimulate the group to think about alternatives it would not have considered otherwise. Don't shut down divergent thinking.

Appoint a recorder and chart ideas publicly. Let people call out ideas as they think of them and ask the group to be responsible for helping the recorder capture everything that gets said. Use participants' exact words; do not rephrase suggestions or question the speaker except to check that the thought has been correctly recorded.

STEP THREE: Clarify and Categorize or Link Alternatives

As a group ask questions that will make the meaning or intent of an idea clearer and will let members check their own assumptions about certain items with the person who proposed them but *do not allow evaluative commentary*.

Sort and categorize the alternatives. Together, scan the lists for ideas that are closely related or almost the same and belong together in a category. Circle and link ideas but do not cross them out or rephrase them.

Note/name patterns or trends in the solutions proposed.

STEP FOUR: Evaluate the Alternatives Against the Problem-Definition

Ask: Will these help us to reach xyz? What else do we need to know in order to determine whether this is a likely approach? What are the likely advantages to this approach given what we know about the problem? What are the potential disadvantages?

STEP FIVE: Agree On One or More Approaches to Try and Make Implementation Plans

Establish who will do what, when, how—or a time to make those plans.

STEP SIX: Determine How/When You Will Assess Whether the Problem Has Been Solved

Set criteria for success. Determine what kind of data the group will need to collect—and how they will collect it—in order to determine how well the solution is working. Set a timetable for checking back to see if modifications are needed.



Criteria for Selecting Teacher Leaders

CONVICTION

Effective teacher leaders . . .

1. ***Are strong in their conviction about the ability of all individuals to learn.** Teacher leaders should be able to demonstrate that they make decisions based on strong beliefs about students' and adults' capacity to learn. Prospective teacher leaders need to have internalized and attempted to act on the threshold belief "All can achieve; no excuses are acceptable."
2. ***Routinely reflect on practice and show indicators of having "expert careers."** There is clear evidence that these candidates regularly use data to inform their instructional decision-making. They ask for help and seek answers from others when needed. As Bereiter and Scardamalia (1993) note, expert careers are characterized by reinvestment of mental energy in teaching and by a habit of progressive problem-solving. Faced with complex problems, experts seek to widen their understanding and develop new competencies, whereas "experienced non-experts" seek to reduce complex problems to known routines or force-fit them into established practices. Strong teacher leader candidates will always be looking for the next interesting challenge rather than a way to say, "We do that already."
3. **Understand the balance between individual autonomy and collective commitment.** Teacher leaders understand that there are complex problems requiring collective decision making. Once there has been a group commitment to try out an intervention or strategy to benefit students, they will sacrifice their individual autonomy and implement the agreement even if they are not in complete accord.
4. ***Take responsibility for student learning.** Teacher leaders are not prone to blame students for their failure to learn but ask the question "What can I/we do differently to help students perform at a higher level?"
5. **Are driven by twin passions of urgency and hope.** These convictions fuel and inspire faith during tough times. Teacher leaders need to be able to draw on their own images of a positive future for students, communicate that image to others, and convey the importance of timely interventions when the pace of change feels overwhelming to colleagues.
6. **Have a track record of seeking opportunities to collaborate actively with colleagues on teaching and learning challenges.** This practice stems from a mindset, not from a mandate. Even if the role is not explicitly described as requiring collaborative problem-solving, these candidates will talk about making themselves available to support, advocate for, and even challenge colleagues.
7. **Seek growth, respond well to challenge, and accept the need for change when there is valid evidence that a practice is not working.** They often make quiet, unheralded adjustments that improve teaching and learning or grab new programs and practices and make them their own rather than allowing themselves to feel overwhelmed and threatened by change.

* Special importance



8. **Have a clear understanding of the school as a workplace** and connect their classroom work to broader organizational goals. They endorse and support the idea that classroom work needs to be aligned with school and district priorities and will show themselves to be well informed about district initiatives and questions that have impact on their students. There are many good (perhaps not great) teachers who limit their field of functioning entirely to their own classroom. They are less likely to make good teacher leaders.
9. **Are not driven by egotistical needs to be the center of attention**, the most dominant member of a group, or the person who gets external credit and praise all the time. Individuals who have made a career out of competing with colleagues, getting various student and parent audiences to “love them,” or dramatically proving their worth to the world are likely to end up using team initiatives to further their own personal agendas. The best teacher leader candidates should also show signs of capacity-building leadership skills in the ways they have worked to bring out the best in their students and parents.

COMPETENCE

Effective teacher leaders . . .

10. ***Display a rich, substantive knowledge both of academic subject matter and of generic pedagogy.** This knowledge is critical to being able to contribute and lead conversations focused on finding and solving complex learning problems.
11. ***Are excellent problem solvers in their individual classrooms.** Because teams need to be led by individuals who display habits of resourcefulness, initiative, persistence, and an ability to generate alternatives, look for individuals with a track record of applying those habits and skills to their own classrooms first.
12. ***Have skill in dealing with conflict and difficult issues.** Teacher leaders deal well with conflict and will push back with colleagues and administrators respectfully; they surface disagreements within the team, not in the parking lot.
13. **Sustain transparency and ask for help.** These teachers are willing to examine their practice publicly by inviting colleagues into their class and by sharing student data. They are willing to ask for help with teaching and learning problems.
14. **Advocate for students, not for an adult constituency.** Teacher leaders do not represent, for example, a group of 5th-grade teachers; rather they advocate on behalf of 5th-grade students.
15. **Have some experience in using standards and data.** We cannot expect to find experts in analyzing data, but we should screen leaders for some knowledge, and more importantly, considerable motivation to learn more.

* Special importance

Adapted from A.D. Platt et al., *The Skillful Leader II: Confronting Conditions That Undermine Learning*, Acton, MA: Ready About Press, 2008, pp. 36-45, 154-158.



Selecting for and Building Teacher Leader Conviction

Once upon a time, in the 1990s, hiring teachers consisted almost entirely of selecting those individuals with the most promise to succeed in the classroom. Even now, that is still the primary consideration. However, research documenting the impact of teacher collaboration on student learning suggests that we need to hire “collaboration-ready” teachers. This is not always possible because recession-driven districts are hiring fewer new teachers. As a result, we need to select and build our teacher leaders from existing personnel. In choosing these leaders, however, we must still apply selection criteria.

Administrators in the process of selecting teacher leaders must remember the caveat that we can build skills more easily than we can change peoples’ beliefs. Therefore, the selection process needs to identify individuals whose convictions and beliefs are in alignment with individuals committed to doing collective work. Some samples include:

1. Adults and children have the ability to learn.
2. Expertise develops as a result of continuous effort to find and tackle problems for which there are no currently known solutions; it does not develop because individuals are able to force-fit known technical solutions to new problems.
3. Individuals must sometimes give up individual autonomy in order to pursue the collective good.
4. A strong sense of both urgency and hope compel us to persist in trying to reach students even in the face of adversity.

Sample Interview Questions

Note: The questions below may need to be modified depending on the experience level of the teacher. In some cases, the question might be turned into a hypothetical situation.

1. Probing for the ability to learn belief

Teacher leaders should be able to demonstrate that they make decisions based on strong beliefs about students’ and adults’ capacity to learn. Prospective teacher leaders need to have internalized and attempted to act on the threshold belief, “All can achieve; no excuses are acceptable.”

Sample Question

How do you or might you respond to a colleague who attributes his or her lack of success with a particular group of students to the students’ low ability and/or poor home life? Cite an example of how you followed up your conversation with that colleague.

Look for: Examples of confronting colleagues and knowledge of attribution theory, which describes different causes (attributions) for success and failure (Saphier, 1997, p. 317).

2. Probing for beliefs about how expertise develops

It is helpful if potential teacher leaders have experienced and/or thought about the difference between work that requires a value change or change of “heart and mind” (“adaptive change”) and work that merely requires an alteration in routine or minor modification in practice (“technical change”) (Heifetz and Linsky, 2004). Complex problems such as closing achievement gaps cannot be solved by short-term, technical changes such as lengthening the amount of time spent on literacy instruction while failing to address the underlying poor instruction that would require a more adaptive response. Adaptive changes tend to be more sustaining.



Sample Questions

- a) Can you tell us about an innovation, new approach, or strategy that required you to substantially change your classroom practice in an effort to improve students' performance? How did it impact your beliefs about improving learning for students? What changed and how did it affect your subsequent thinking and practice?

Look for: The ability to identify and analyze a change in practice that caused a reexamination of belief or a change of mindset, not just an adjustment of time spent or a change of routine.

- b) Please describe a time when you were part of a professional community that was able to collaborate effectively to make a positive difference for student learning. What were the circumstances surrounding that collaboration? What were your goals? What were the most important attributes of the way the group worked?

Look for: Evidence that candidates can make a distinction between cooperation and collaboration and that the work and the outcomes they describe are substantive rather than rearrangements of technical aspects of instruction such as scheduling or grouping.

3. Checking for understanding of the balance between individual autonomy and collective commitments

Strong teacher leaders should understand that there are complex problems which require collective decision-making but be able to resist the call to “involve everyone in everything.”

Balancing autonomy with collective commitment has another face. Teacher leaders need to understand when it is appropriate to challenge administrative or union attempts to ensure conformity when that conformity is not in the best interest of students.

Sample Questions

- a) How do you determine when decisions and problems can appropriately be handled by individual teachers or when they should be raised and dealt with collectively?

Look for: Examples of times when committees have invested excessive effort in work that could have been best left to individuals—e.g., taking an hour in a meeting to draft a field trip letter to parents, figure out a snack policy for exam period, go over library use guidelines and determine when they will be communicated to students, or decide on the format for writing mid-year comments.

- b) Can you think of a time when you were being pressured to conform to the thinking of a committee, an administrator, or a union leader? What did you do? Why did you choose to do that?”

Look for: A willingness to resist pressure to conform to an authority figure coupled with clear evidence about how the individual determined that the request was not in the best interest of students. Make a clear distinction between individuals who reveal their dislike of any authority figure through a litany of accusations and criticism (“they always” or “if it were left up to them”) and individuals who can cite specific instances when they felt they needed to point out discrepancies between desired outcomes and requested actions.

4. Checking on a sense of urgency and hope

These twin passions provide the fuel to inspire faith during tough times. Thus teacher leaders need to be able to draw on their own images of a positive future for students, communicate that image to others, and convey the importance of timely interventions when the pace of change feels overwhelming to colleagues.

(cont. next page)



Sample Questions

- a) What sustains you during challenging times? In particular, think of a time in when you were feeling discouraged or unsuccessful. How did you turn that around?

Look for: Signs of resilience and bouncing back, signs of depending on colleagues, and willingness to reach out for help.

- b) Who are the role models in your professional life that inspire your practice? What did they specifically do that you found noteworthy and how has it influenced your growth as a professional?

Look for: Signs of a motivating cause or personal mission, an optimism about being able to impact student learning, and a willingness to continue to be influenced by new role models.

Adapted from A.D. Platt et al., *The Skillful Leader II: Confronting Conditions That Undermine Learning*, Acton, MA: Ready About Press, 2008.



Communicating Vision Is / Is Not...

Directions: Circle the statements below that qualify in your opinion as “communicating a vision” to a group of people who have just been assigned to be part of a professional learning community for the first time.

- A.** It’s important to collaborate. I want us to have good conversations about what will help children learn. I hope that we’ll be able to share our ideas productively and really get to know one another this year. I know that we’ll look forward to our time together as an antidote to the loneliness of the classroom.

- B.** We are going to be working in PLCs next year. Everyone will have a team and common planning time in addition to your regular prep—and the grant will provide us with some training and a small stipend. We’re out ahead here, people—on the cutting edge. The district will be watching us—and we’ll show them how to do it.

- C.** Higher-level math is the gateway to all kinds of job opportunities for our students. When kids leave us for middle school, they have to say that we’re the school that helps everyone get smart at math—and they have to demonstrate that they can place into and thrive in the “A” track classes. That’s why we have to pool our knowledge this year because this challenge can’t rest on any one pair of shoulders.

- D.** Our focus this year is collaboration. By the end of September your group should have identified something that you want to collaborate on. Your recorder should send me the Team Report form no later than 10/15, and I’ll schedule a meeting with you to discuss how you are planning to take action and what you need.

- E.** Here’s what the data showed us last year. By doing just the small amount of error analysis we tried with the grade 9 team, we got 20% of our at-risk group over the hump. Now we need that group to be convinced that all of their 10th-grade teachers are behind them—and we need to grab another 30% of the at-risk group right away. This is a doable goal if we pool our intelligence and figure out how to support one another’s efforts. Each meeting we’ll be asking, “What worked since last time? What did you try? How did it go?”



Adaptive Leadership Case Consultation

We are assuming a group of at least four “consultants.” Appoint a **facilitator** whose main responsibilities are to manage the time boundaries and to keep the case presenter from controlling the conversation. Ask the **presenter** to nominate a **note-taker** from the group, someone who will help him/her debrief afterwards.

- Case presenter presents problem: 3-5 minutes
- Group analyzes root causes of the problem: 5-6 minutes
- Consultants feed fact questions to presenter: 6-8 minutes
- Presenter watches and listens (*does not speak at all!*) while group does diagnostic brainstorming: 10 minutes
- Presenter watches and listens while group does action steps brainstorming: 5-10 minutes
- Presenter reflects on what she/he heard: 5 minutes

TRAPS for the facilitator to watch out for:

- Presenter will dominate the conversation, defending and explaining.
- Consultants will jump too quickly to solutions, especially technical solutions.
- Consultants will be afraid to tell the presenter bad news.
- Presenter will hide real stakes and anxieties.
- Consultants will offer insight from their own experience or expertise, rather than see the problem through the eyes of the presenter and other people in the case.
- All will wallow in the facts.



Case Presenter: (3-5 minutes)	In summarizing the case, see Malfunctioning Community Case Study Worksheet (pp. 35-36). <i>Fill in Steps 1, 2, and 3.</i> Who are the major players and, briefly, what are their dynamics? Describe what action you have taken or are thinking about taking in reference to this team. And frame the question you would most like to have your consultants address.
Root-Cause Analysis: (5-6 minutes)	What are the major causes of the poor team performance?
Fact Questions: (6-8 minutes)	Fact questions purpose: To determine the context and more fully describe the problem. <ul style="list-style-type: none"> • ? • ?
Diagnostic Brainstorming: (10 minutes)	Possible guiding questions: <ul style="list-style-type: none"> • What are the case presenter’s stakes? • What issues or values does the presenter represent to the group? • What are the underlying or hidden issues? • What is the adaptive challenge for the group? For the presenter? What are the value choices each has to make? • How does the situation look to the other key players? What is the story they are telling themselves? • What options are off the table for the presenter and why? • What has the presenter contributed to the problem? What is her/his piece of the mess? • What possible interpretations has the presenter been understandably unwilling to consider? • What would success look like to the players other than the presenter?
Action Steps Brainstorming: (5-10 minutes)	Possible guiding questions: <ul style="list-style-type: none"> • What possible initiatives should be undertaken? • What are low-risk tests of some of the ideas discussed? • What courageous conversations need to take place? • What new partnerships or relationship shifts need to happen? • What are specific and possible goals over the next month to achieve?
Presenter Reflections: (5 minutes)	This is really open space for the presenter to react to what has been heard. The idea is that the presenter will “rent” the ideas, trying them out, rather than “buying” them or defending against them. Often, the presenter finds him- or herself spinning a bit from the experience and it is a good practice to both take a break shortly after and to have one person check in with the presenter afterwards.

Thanks to Cambridge Leadership Associates, 124 Mount Auburn Street, Suite 200 North, Cambridge, MA 02138 • 617.576.5766, www.cambridge-leadership.com • info@cambridge-leadership.com



Making Your Instructional Leadership Teams (ILTs) More Accountable

Note: Districts have different names for instructional leadership teams (ILTs). We are focusing here on site- or district-based teams that focus on teaching and learning.

Goal

To make your ILT into a model accountable community that:

- Supports teacher leaders as they encounter difficulty in leading their teams
- Serves as a locus for learning about facilitation skills
- Provides a structure for monitoring school progress and structuring professional learning for the school.

Resources

1. Problem-Solving
The Difficult Participant SOS
Adaptive Leadership Case Consultation (pp. 31-32)
Identifying problems from data for creating an ILT action plan
Problem-Solving Protocol: Using a Problem-Solving Process (pp.21-22)
2. Reporting of Team Self-Assessment and Goal-Setting
Capacity Rating survey (pp. 11-13)
3. Norm Development
Setting and monitoring norms (see Norm Development Handbook)
4. Building Team Leader Facilitation Skills
Leading Meetings (pp. 20-24)
5. Study Group: Reading in Common
Save the Last Word for Me Protocol (www.nsrffharmony.org/system/files/protocols/save_last_word_0.pdf)
6. Conviction Interviews and Trust Building
Selecting for and Building Teacher Leader Conviction (pp. 27-29)
7. Analyzing How Time Is Spent
Time and Task Analysis for Accountable Communities (p. 19)
8. Walks and Rounds with Leaders



Mini-Interview

Part I

1. What does distributive leadership mean to you? How do you distribute leadership?
2. Do you feel that you need to be at the center of your reform initiative?
 - a. Have you initiated most of the reform initiatives on your site?
 - b. At this stage would your initiatives collapse if you left your position?
 - c. Explain how you have built structures or capacity to sustain the work.
3. Do you spend time and energy developing the skills of building leaders?

Part II

Pick any 3-5:

1. How do you balance the need to make quick decisions with the need to involve people in those decisions?
2. How do you view your role as change leader relative to adaptive vs. technical change?
3. How do you respond to staff conflicts or difficult interactions about goals, programs, instructional strategies, or student opportunities to learn?
4. We hear a great deal about the importance of the transparency. What does this mean to you?
5. What are some of the specific ways in which you establish norms for teams and teacher leaders to be held accountable for their work?

Part III:

1. Which of the following best describes your ILT? Rank order (1-7)
_____ Sounding board for my leadership ideas
_____ Planning structure for adult learning
_____ Laboratory for me to teach teachers about leadership
_____ Main problem-solving team for the school
_____ Partners in implementing school initiatives
_____ Partners in evaluating school initiatives
_____ My eyes and ears
2. Describe how you select teachers for the ILT.
3. Identify any personnel impediments to a high-functioning ILT.

Adapted from A.D. Platt et al., *The Skillful Leader II: Confronting Conditions That Undermine Learning*, Acton, MA: Ready About Press, 2008.



Building Accountable Administrative Leadership Communities

The key to confronting mediocre teaching and confronting other conditions that undermine learning depends on building strong leader communities. Here are four community-building ideas to help confront mediocre teaching.

1. Calibration Exercise: Groups observe a videotaped lesson (or observe a class for 15-20 min.)

Purpose: To build consistency and validity by reaching a shared definition of excellence and a shared recognition of gaps in performance.

Tips

- Do not establish a focus in advance.
- Have members give a holistic rating (1-10) and prepare data to support rating.
- Share ratings and strengthen and stretch data.
- Discuss possible feedback and recommendations.

2. LASW (Looking at Supervisor Work): Groups examine leadership products

Purpose: To raise the standard and consistency of supervisor work and to align the work of administrators with that of teachers.

Tips

- Members bring multiple copies of teacher performance observations or summaries written about teachers who are below standard in some area.
- Reports are read and responded to with questions and suggestions.
- Readers should pay particular attention to: (1.) details of evidence and examples, (2.) “softball” suggestions, and (3.) inflated language that buries concerns and gives undue weight to positive areas.

3. SOS Case Study Teams: Members present case problems to small group

Purpose: To create a leader community where members faced with difficult personnel issues can ask for help and/or give assistance.

Tips

- Every member is expected to share a case during the course of the year.
- Clearly define case problems before moving on to solutions. Symptoms and underlying problems are often confused.
- Individuals who get case help must report back to the group with progress reports.

4. SOS Tenure Check Teams: Members present cases of teachers for whom they have reservations about granting tenure

Purpose: To increase the shared accountability for granting tenure in order to elevate the quality of teachers receiving tenure.

Tips

- The ethos is that tenure is not an automatic process and must be earned—“If in doubt, let them out.” If a principal has “no reservations,” he/she should share with the group explanations for each tenure decision.

Adapted from A.D. Platt, C.E. Tripp, W.R. Ogden, and R.G. Fraser, *The Skillful Leader: Confronting Mediocre Teaching*, Acton, MA: Ready About Press, 2000.





Malfunctioning Community Case Study Worksheet

Complete individually.

Team Name:

1. Check off predominant level of team functioning.

Toxic Laissez-Faire Collegial Collaborative Accountable

2. Summarize what data you have collected and/or your efforts to change the team’s performance to date. Use bulleted phrases.

-
-
-
-

3. Identify and write down relevant gaps in the 3 C’s (Conviction, Competence, Control). Use or adapt language from the indicators on p. 2 to describe the major issues, e.g.

- The team does not deal effectively with conflict. (Competence)
- The team rarely uses standards and data to anchor the work. (Competence)
- The team does not share the belief that all students can learn. (Conviction)
- Teamwork focuses mainly on sharing and celebration and not on solving problems of student learning. They lack mechanisms for identifying and solving student learning problems.
- The team is not collecting data to inform their instruction.

-
-
-

4. Define the impact (s) on student learning. Who is losing out? What are the observed or likely inequities, opportunity costs, short or long term effects on groups of students and your school?

- As a result, at least half of the 8th grade is not getting a chance to practice writing constructed responses to questions requiring critical thinking and to receive substantive feedback on their efforts every two weeks.
- Students in the classrooms of team members who have “agreed to disagree and do our own thing” sit passively for large amounts of time, show themselves to be less able to solve unfamiliar problems, and have increased numbers of discipline referrals and passes to the nurse.
- Thus students whom the team has labeled as less capable will have little or no opportunity to complete the required curriculum and will be automatically excluded from advanced science.



Complete in trios.

Purpose: Each participant will get peer assistance in planning a first intervention for an identified team to be implemented before the Skillful Leader March session.

Procedure: Each member of the trio has 2 minutes to present his/her case and the impact on student learning. Partners then have 8 minutes to help the presenter think about and complete responses to steps 5-7 below.

5. Select action steps and enter them in your table below.
See Toolkit in this packet

Starter Questions to Guide Action Planning

- Are the Control conditions of time, space, and agenda in place?
- Is the team in need of skill building including a clearly developed set of norms consisting of values, procedures and skills?
- Is the team/school in need of a clearer vision about the purpose of collaboration or some reframing of ability to learn beliefs?

6. Identify data to be collected—and how it will be collected—to determine the effect of each action step and what needs to happen next.

7. Identify indicators for success. (i.e., What would be positive signs of moving toward improving performance?)

5. Action Steps	6. Data to be Collected	7. Indicators for Success

