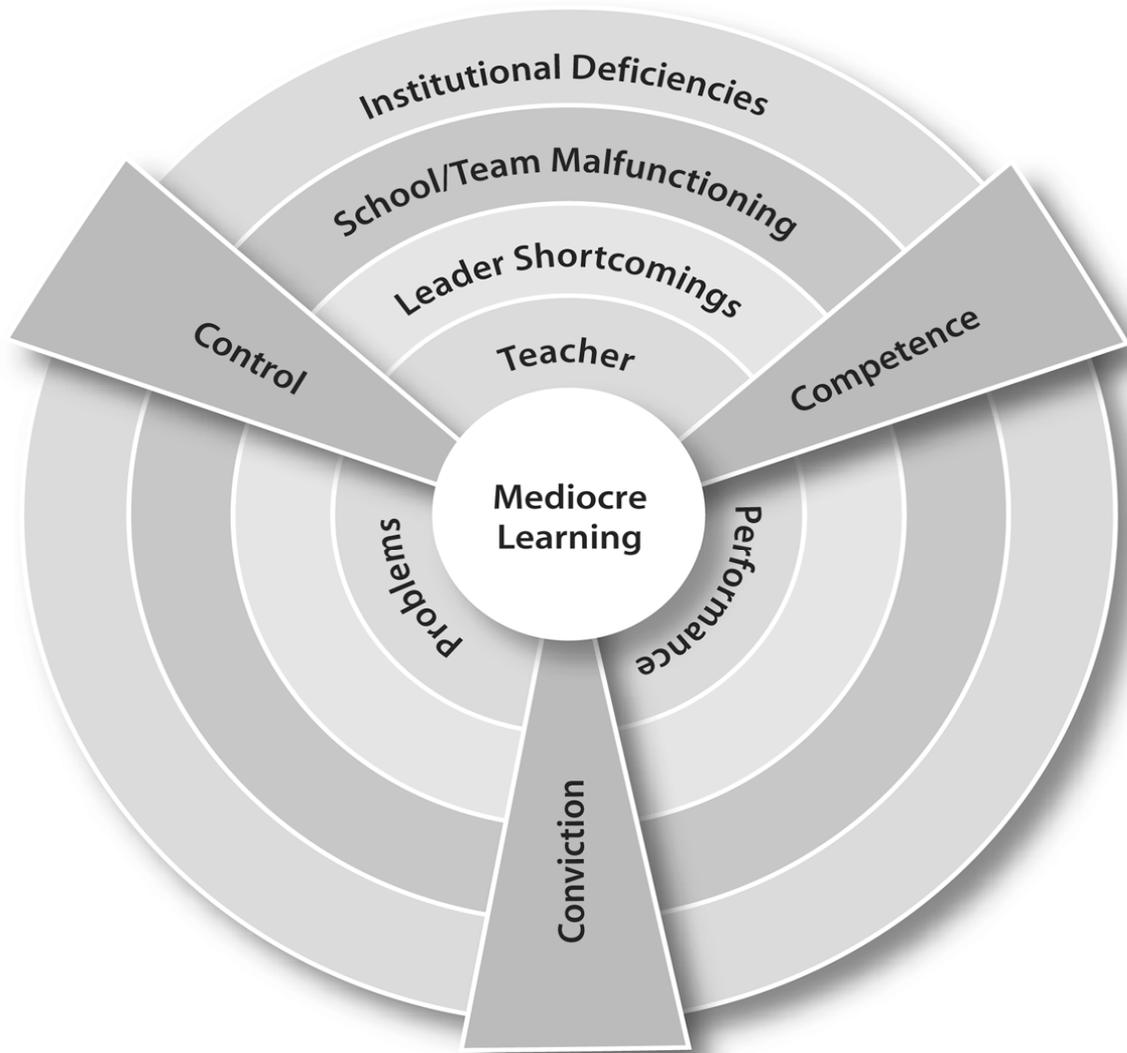


Skillful Leader II: Confronting Conditions That Undermine Learning

Study Guide and Skillful Leader Toolkitsm



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Introduction

Overview

This Study Guide and Skillful Leader Toolkitsm has been developed to accompany *The Skillful Leader II: Confronting Conditions that Undermine Learning*. By using the rich case studies, legal notes and models in the book plus this guide, facilitators can design multiple sessions and build their own accountable leadership communities. We hope these pieces will be fundamental resources for school, district or university leaders charged with creating ongoing professional learning experiences that improve leadership capacity and competence and address ineffective practices and persistent gaps in individual and organizational performance.

Features of the Study Guide

To Think About/Talk About These sections contain questions to focus reading or to help facilitators stimulate discussion. Some of the questions are intended to help members make connections between the reading and their own experiences and work settings. Others help readers to summarize text in order to establish common understandings.

📣 Communicating the Vision Questions with this label are intended to help leaders become clear and articulate about the compelling reasons for action and the results they desire. The answers are important components of your strategy for motivating and focusing your leadership effort. Resist the temptation to skip them. Distill the groups' best offerings into easy-to-remember "chants" or key phrases that capture the heart of the important outcomes the district seeks. Then commit to using those communicating vision pieces repeatedly with a variety of audiences and in a variety of settings.

🔄 Fieldwork Ideas Fieldwork is designed to be completed between sessions and to help group members make immediate, practical use of their reading. Fieldwork falls into three general categories with considerable overlap:

- **Data collection** tasks allow individuals to collect information that will help groups diagnose or define problems, determine where action needs to be taken or assess how well an initiative is working;
- **Case study** suggestions help study group members focus on ways to apply ideas and deal with complicated, multi-faceted challenges
- **Application exercises** are meant to solidify understanding and require each individual member to make sense of the readings and discussion in his/her own context.



The Toolkit



The Toolkit supports the Study Guide by providing data collection surveys, protocols, and organizers to pursue more in-depth work. These are located in the second section and referenced in the Study Guide where appropriate. Tools can be used in conjunction with specific assignments or independently. No permission is needed to copy these instruments.

getting started

Pick a Focus: Eventually we hope that all of *Skillful Leader II* will help you find and confront conditions that support mediocre learning in your own setting. If you plan to start at the beginning and read chapter by chapter, then skip to the heading on case studies and experiments below. The book is designed so that individual chapters, such as Ch 11 on developing and supporting principals, or small sets of chapters such as chapters 7 and 8 on data sources and data use can stand alone. Choose your specific entry point, but pay attention to the recommended clusters and sequence of chapters below. The charts on the following page suggest some ways to “chunk” your study using interest or role related starting point.

<i>If your interest is</i>	<i>Focus on</i>
Building effective professional communities or improving the functioning of existing teams, departments, committees	Chapter 1 Chapters 3-6
Examining the roles, responsibilities and challenges of district level administration, institutional policies and practices, or beliefs	Chapters 1 and 2 Chapters 10, 11, 13
Improving supervision and evaluation both of individuals and teams	Chapters 1, 3 and 5 Chapters 7-9, 12

<i>If your role is</i>	<i>Focus on</i>
Principals and Supervising Directors	Chapter 1, 3-6, 7-9, 12
Central Office	Chapters 1, 2, 10-13
School Based Teams	Chapters 3, 4
Human Resources and Personnel Administrators	Chapters 12, 13



Case Studies and Experiments: You will find vignettes and case studies scattered throughout *Skillful Leader II*. They range from the three introductory pictures of schools trying to close achievement gaps in Chapter 1 to Chapter 5's tales of toxic teams and Chapter 9's cases of individuals who undermine learning. Compiled from the experiences of school leaders across the country, these examples are meant to help you form a concrete image of a set of behaviors or a particular condition that blocks learning. Nothing, however, is more helpful for solidifying learning than applying insights and taking action on a case of one's own. Add what you learn as you go along to the pool of strategies and insights you and your colleagues are creating.

Use  #1 "**Malfunctioning Community Case Study**" problem-solving protocol and worksheet to organize and support your work in helping a professional community become an accountable community.

Reading Assignments: To provide variety, break large chapters into manageable segments if time is tight, create individual accountability for reading, and help get many voices involved in discussions consider using one of the following:

-  #2 **Save the Last Word** protocol which generates high levels of energy and engagement;
- **Mini jigsaw** reading in small groups. Individuals in even sized small "home" groups count off and then regroup themselves by number or letter, i.e. all the 1's together, all the 2's etc. Each numbered or lettered group is an expert group assigned to read, process, and prepare a summary and/or visual of a particular segment of reading that members can then teach to their original home group. For example, in Chapter 2 "Confronting Blocks to Organizational Learning," everyone can read pages 11-12 and individuals can read one assigned section on a "block." Another good example is Chapter 3 "Professional Community and Mediocre Learning." Everyone reads pages 29-32 and the sections describing levels of community on pages 32-36 could be subdivided and assigned to individuals.



1 Conditions Worth Changing

TO THINK ABOUT/TALK ABOUT

1. Read and compare the cases of Mid-Balkans High School and Miraculous Middle School (pp. 1-3) Then stop and together consider

Who's getting hurt in these two schools?

What are the conditions contributing to the problems in these schools?

What mistakes has leadership made?

What choices have teachers and colleagues made?

Are there any aspects of these cases that are similar to situations that you face?

2. Consider options A-D (pp. 3-4). Discuss why at some point each is likely to have been attractive to decision makers. Together, identify the assumptions on which each of these options is based, e.g. that observing someone who is a role model will help/enable an individual to learn the necessary skills to improve his/her performance.
3. How do low performing teams, grade level groups, or departments contribute to mediocre adult and student learning? Give an illustration from your own experience.

4. Why do equity and opportunity matter so much?

 **Communicating the vision**

5. Consider the five assumptions that have shaped this book (pp. 7-8). Which of these options would you agree with based on your own experience? Which might you want to argue with? Why?
6. Which, if any, of the 3 C's described on pp. 8-9 might be most relevant to each of the cases in this chapter?



1 (cont.)

FIELDWORK IDEA

Application Exercise: Quick Assessment

Take 20-30 minutes to do a “first pass” assessment of the formal and informal groups that have responsibility for influencing student learning in your own work setting. Think about influential sub-groups or long-time collaborations as well as formal teams. Decide which of those groups are currently able to work together effectively to solve problems and improve their own performance—and which are not. Make a rough sort list and bring it to the next study group meeting.



2 Confronting Blocks to Organizational Learning

TO THINK ABOUT/TALK ABOUT

1. Why do we need to pay attention to /spend time on organizational learning? How does that help folks at the classroom level help students?  **Communicating the vision**
2. How do you think people arrive at “a deeply desired personal image of what future success would look like for students?” What are the factors that shaped your personal vision of what school should give young people?
3. Which of the vision-afflicting conditions described on pp. 13-16 might be creating problems at one or more levels of your school system? What signs or symptom are causing you to think that?
4. Which of the causes of organizational attention deficit disorder (ADD) discussed on pp. 18-21 squared with your own experiences? What conclusions do you draw when you assess your current organization for signs of attention deficit?
5. What is the difference between a healthy competition and unhealthy or undermining competition? (pp. 22-24)? How does a leader determine when competition is unproductive?
6. Cite an example of gap between knowing and doing (pp. 24-26) that you have seen (or perhaps been part of) at any level of the school district. Why did that happen? How could it have been avoided?
7. How would you rate your current organization’s commitment to getting and using feedback on its ability to solve problems? What are the indicators you used for your rating?



2 (cont.)

(C) FIELDWORK IDEA

Data Collection: Rating Conditions

After you finish reading, rate your own district/organization on each of the conditions that undermine organizational learning using the scale below.

1. Absolutely not a block in this district/organization.
2. Some trace evidence in pockets but a diminishing concern overall
3. Minor block at present but may be increasing
4. Substantial block and contributor to undermining organizational change
5. A stopper and a “community buster”

	1	2	3	4	5
Broken, clouded or cockeyed lenses					
Organizational ADD					
Operating by the law of the jungle					
Knowing/Doing gap					
Feedback failure					

Identify 1-2 blocking conditions present in your district and develop and implement a plan of intervention to establish practices that would remove this block.



3 Professional Communities and Mediocre Learning

Facilitator Note: This is the core chapter for understanding the levels of community and the three capacities (3 C's of Control, Competence and Conviction) that make diagnosis and intervention possible.

TO THINK ABOUT/TALK ABOUT

1. Consider the common gap “between the promise of adult collaboration and the current reality” (p. 29). Which of these descriptions are present in your current work situation? How does your own local gap affect your ability to improve student performance?
2. What should high functioning adult groups be able to contribute to a school or a school district?  **Communicating the vision**
3. Which of the four characteristics of high functioning groups (p. 30) are widespread and well developed across all of your teams, schools, or district? Which need further work? Why?
4. Why is pooling mental effort (p. 30) so difficult to do and so poorly understood?
5. Why do toxic, laissez-faire and congenial communities undermine adult learning?
6. Why shouldn't leaders be satisfied when communities reach the collaborative level of development?
7. How do the 3 C's help you to explain why some of the professional communities you observe are successful at pushing their own learning and solving problems in student learning and some are not? What implications do you see for your own work?
8. What implications and applications did you think about when you read the Leader Alert: “Make Your Deeds Match Your Words” (p. 42)?



3 (cont.)

(C) FIELDWORK IDEAS

Data Collection: Observing a High Performing Team Observe your highest performing team and see how many capacities of a Collaborative or Accountable Communities are present.

Application Exercise:  **# 3: Taking a Snapshot of Community Development**

Under the community name column, fill in the names of the communities to which you belong or with which you work regularly. Use the profile descriptors from Chapter 3 to rate each group. Draw a line along the continuum to indicate the current level of development for each group. Note that you can be a member of—or have interactions with—sub-groups or informal associations and count that as a professional community, *i.e. a cohort of principals who are piloting a new program, all the people who teach Algebra I, the teachers who walk together two mornings a week and always share ideas, or a lunch bunch that routinely exchanges gripes and vents.*

As an alternative, predict team performance prior to reading; then confirm or disconfirm ratings after reading. This graph can be used to select a case study.



4 Community Building 101: Setting the Stage

TO THINK ABOUT/TALK ABOUT

1. Where in your own life have you seen or participated in an example of collaboration as a powerful mechanism for bringing about change? Where have you seen or participated in an example of “collaboration” that failed in its intent and outcomes? Which image is likely to crop up in your head when someone calls for work to be done by a group rather than an individual?
2. Chapter 4 focuses on leaders’ debilitating beliefs, often overheard in meetings when an administrative team is trying to respond to a challenge or in small group conversations about the potential success of an initiative. Rank the five debilitating beliefs listed in the chart (pp. 55-56) from 1-5 according to *how frequently you think they are present in your meetings or influence leader decisions*. (The most common belief would be 1, the second most common 2 etc.) Be prepared to talk about why you ranked as you did.
3. Review “Some Values Are Non-Negotiable” (p. 60). Identify at least two of your own Level 1 and Level 2 values. Be prepared to talk about how (in what ways and how often) you communicate these values to individuals and groups with whom you work.
4. Read and Respond to “*Start by Building Trust*” (pp. 64-65). Are any teams you work with suffering from trust issues? Do any of the strategies (pp. 65-68) suggest ideas for building trust for these teams?
5. Read and Respond to Case 4.1 “*Structuring Collaboration for Student-Oriented Progressive Interaction.*” (p. 69) What is your reaction to Tom Levine’s call for caution with structured interaction? Do these ideas apply to your setting? If so, how?
6. Read and Respond to “*Make Every Meeting Worthwhile*” (p. 74) Using the bulleted criteria to evaluate the quality of agendas of meetings you participate in or lead.

Communicating the vision



4 (cont.)

(C) FIELDWORK IDEAS

Application Exercise: Rating Strategies

Use the scale below to rate the strategies on building conviction (pp. 60-64) and building competence (pp. 65-69). Compare your ratings and questions with colleagues and explore the past experiences and unstated assumptions that affected your ratings.

0. Already tried and failed
1. Not likely to work
2. Possible impact on beliefs
3. Likely to impact beliefs
4. Intend to use research and/or implement this soon
5. Have already used successfully and will continue

Note. If a strategy makes no sense to you, or you cannot imagine why it might be effective, label it with a large question mark.

Data Collection: Debilitating and Driving Beliefs.

Make a chart similar to p.55 with columns for Debilitating and Driving Beliefs. Focus especially on Ability to Learn Beliefs. During a two-week period, collect verbatim quotes on the language that supports or undermines conviction. Sources should include teacher conferences, team meetings, quotes on classroom walls etc. During follow-up leadership meetings, present your findings to the audience best equipped to help you think about the implications and take action (i.e. your school leadership team, a subgroup charged with school improvement, or individual departments and grade level groups). Work with the team to determine patterns and follow-up action.

Application Exercise: # 5 Creating a Vision

Evaluate each statement. Select the one (s) that work best for you and then develop your “elevator speech.” This will be your goal oriented vision chant: what you believe about students’ capacity to learn, the power of teaching to transform students’ lives, and the importance of collaboration.

Application Exercise: Norm Setting

Develop the competence of one or more of your new or your struggling communities by facilitating a norm-setting meeting or series of meetings and then helping the group apply and monitor norms. See *Norm Development Handbook* under Resources at www.ready-about.com.



4 (cont.)

Application Exercises: Rating Team Capacity

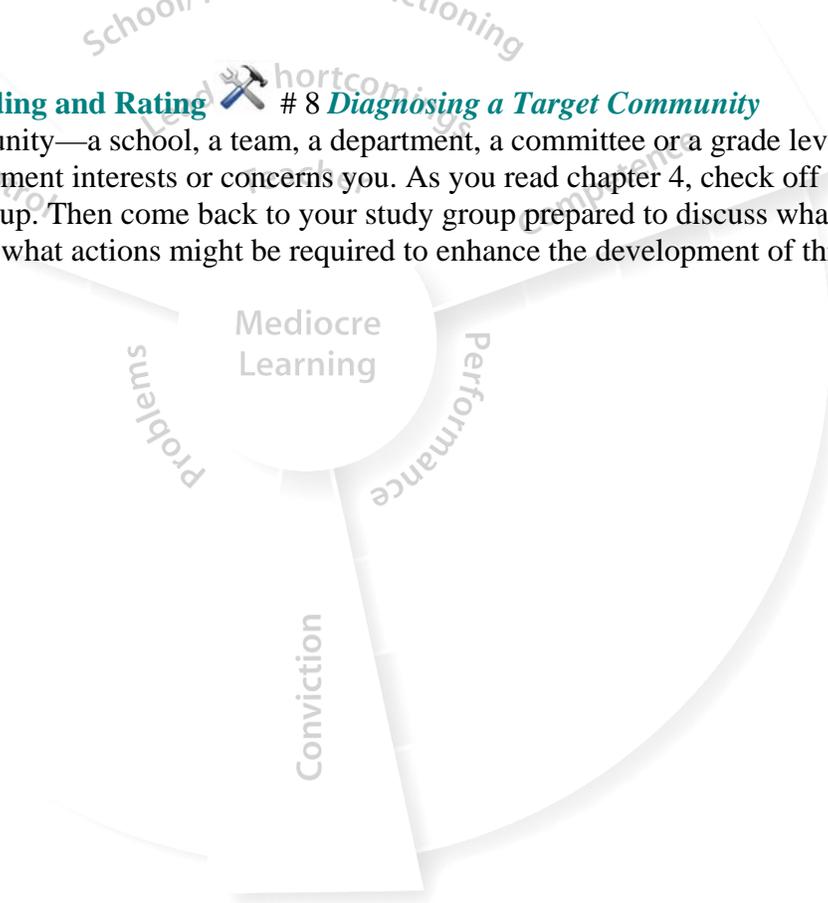
 # 6 *Survey of Community Competence* or

 # 7 *Community Development: Rating your Own Capacity*

Fill in either survey and then report out and compare ratings. As a leadership or development team, determine whether you have developed common standards and expectations about what constitutes a high functioning community and what implications you see for work at the school and district levels.

Data Collection: Reading and Rating # 8 *Diagnosing a Target Community*

Choose a target community—a school, a team, a department, a committee or a grade level group—whose development interests or concerns you. As you read chapter 4, check off where you would rate this group. Then come back to your study group prepared to discuss what patterns you noted and what actions might be required to enhance the development of this group.



5 Challenging and Changing Malfunctioning Groups

Facilitator Note: Leaders are tempted to move prematurely into this chapter to confront poor teams. Before confronting poor teams, leaders must first develop a clear vision of excellence by understanding the capacities of collaborative and accountable communities described in Chapter 3. To avoid participant overload, establish a common ground by selecting one or two low performing cases for everyone to read—perhaps one from the Laissez Faire and one from the Congenial section. Alternatively, facilitators may want to ask groups of participants to identify and read 2-3 cases similar to actual cases they have. This chapter is set up for participants to develop their own case study that they can follow over 8-10 weeks. (See Toolkit #1)

TO THINK ABOUT/TALK ABOUT

1. What are the 3-4 critical features, impediments or conditions that lead to malfunction?
2. How can we justify asking busy leaders to spend time on confronting malfunctioning teams?
What is the intended impact of effort spent on improving teams?
3. Which of the Challenges for Leaders represents the biggest underminer for success?
4. In your experience, which of the Ineffective Leader Responses are most likely to be selected by a busy or frustrated school leader? Explain why they might be tempting but likely to be ineffective?
5. Of the Effective Leader Responses, which ones are most likely to make a difference?
6. What additional effective responses come to mind?

 [Communicating the vision](#)

FIELDWORK IDEAS

Case Study: Malfunctioning Team

Identify a malfunctioning team you know from current (ideally) or past circumstances. Use the descriptors of toxic, laissez faire and congenial to help diagnose current level of functioning (79-

5 (cont.)



80, 97-98, 112-113). For more detail, look back at Ch. 3 “Professional Communities and Mediocre Learning.”



#1 *Malfunctioning Community Case Study*

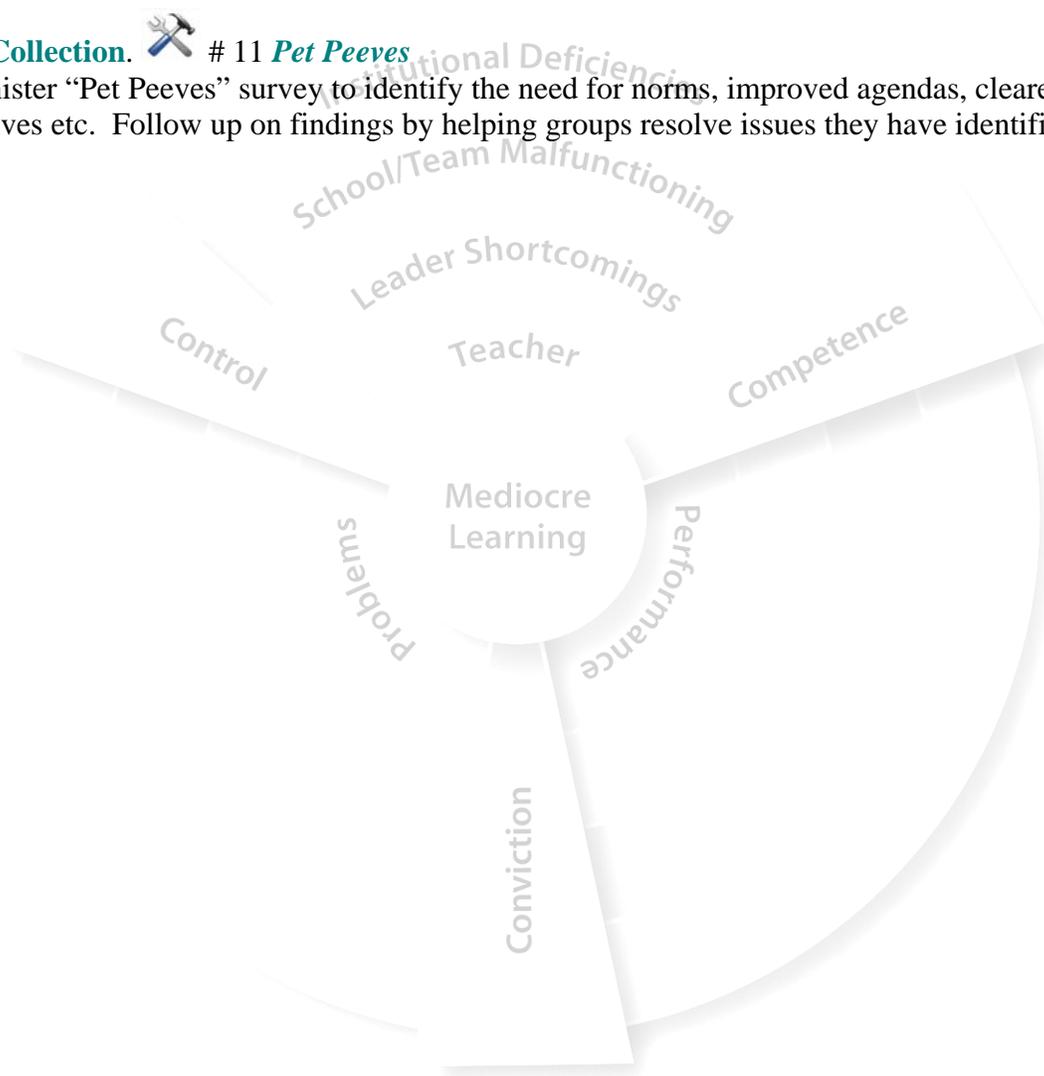
Carry out a 2-3 month case study as described.

Data Collection.



11 *Pet Peeves*

Administer “Pet Peeves” survey to identify the need for norms, improved agendas, clearer objectives etc. Follow up on findings by helping groups resolve issues they have identified.



6 Moving Communities from Collaborative to Accountable

Facilitator Note: The most important outcome of studying this chapter is to give participants strategic ideas for helping their school or teams build capacity to move from a well functioning (collaborative) level to an excellent (accountable) level. This is a complex chapter for a study group to tackle because it is organized with a serial case that develops over time. The chapter deals less with specific strategies and more with systems such as hiring, building teacher leader capacity and creating model teams. There are several options to consider. One starting point would be that everyone reads the introduction (pp.127-133) and does a focused reading of each part of Case 6.1, skimming the sections and identifying sections for further study. Initially you may want to omit the selecting and hiring sections (pp.133-141) and (pp.154-158). Those identified sections of interest could be focus for more active reading and discussion for the next meeting.

TO THINK ABOUT/TALK ABOUT

1. What are the indicators of being stuck at a Collaborative (“good”) community and what attributes are they missing that would make them an Accountable (“great”) community? Can you think of a community or school that fits the description of “Collegial Elementary”? (pp. 128-133)
2. Interview yourself or a colleague using the questions on pp. 138-141. What do the responses suggest about your own or another’s tendencies to perform as a Transition Leader or a Capacity Building Leader? (pp.133-141)
3. Which strategies to help communities evolve from the “Identifying Stretch Points” section (pp. 142-149) appear to be useful in your situation?
4. Which of the struggles stated by the principals’ fit your circumstances, or what other struggles do you have? (p. 150)
5. Review the members of your site-based leadership team. To what extent do the members exhibit the attributes described? (pp. 155-156)
6. Assess your skill at building teacher leadership capacity. What ideas might be helpful to you in this area? (pp. 158-163)

6 (cont.)



(C) FIELDWORK IDEAS

Data Collection: Assessing Your Leadership



4 *Leading Styles: Mini Interview*

Interview each other to determine whether your preferred leadership style is similar to that of a Transition or a Capacity Building Leader.

Data Collection: Team Functioning

Observe a school based team that is cited by others as high performing. Collect data and give feedback to the leader or to the entire team about the Capacities detailed in Ch 3 “Professional Communities and Mediocre Learning” and together determine opportunities to grow.

Data Collection: Exchange Visits

Administrators exchange visits to faculty or team meetings and give feedback about the quality of the interaction and impact of time spent on student or adult learning.

Application Exercise: Agenda Analysis

Collect samples of “typical” agendas for several teams who have an hour or more of common planning time a week. Do an item analysis for each agenda item. Rate each item on a continuum in terms of the likelihood that time invested in the item will have a positive impact on student learning.

Unlikely to impact student learning Extremely likely to impact student learning
0 1 2 3 4 5 6 7 8 9 10



6 *Survey of Community Competence* or



7 *Community Development: Rating your Own Capacity*

Identify a team that you believe to be performing solidly at the collaborative level. Help the group examine and discuss the characteristics of accountable teamwork (perhaps excerpt parts of Ch 3 or Ch 5) and/or have them conduct self-assessment and goal-setting activities using findings from the surveys and their readings.

Application Exercise: Protocols

Provide groups with a menu of protocols/structures to help them focus and monitor the flow of conversation about a particular question or issue. See SL 2 Ch7 “Collecting and Using Data” 201-208 & National School Reform Faculty www.nsfharmony.org (Highly recommended. This permission ready-to-copy website is a rich source of protocols for examining work, solving dilemmas, and for learning from student work and from school and classroom visits.)



7 Collecting and Using Data: Vehicles

TO THINK ABOUT/TALK ABOUT

1. If you wanted to convince a group of colleagues (teachers or administrators) on the value of shifting to work focused on students and their learning using multiple sources and vehicles of data, what would you say?
2. Do any of the listed Unpromising Practices linked to “Flailing around” match your school world? (167-168)
3. Contrast the Learning Focused definitions with more traditional definitions of evaluation and supervision (169-170). How would you describe your current practices?
4. How do the authors connect data, problem solving and student learning? (172 and other pages)
5. Read Table 7.1 (172) *Changing Data Use: Narrow vs. Broad Focus*. Where does your school fall on each dimension?
6. The “*Model Memo on Focusing Evaluation on Learning*” (178) highlights the importance of clearly signaling a shift to Learning Focused work. What ideas would you use? Change?
7. What are the major reasons why observing teacher collaboration (186) should become an important component of data collection? Which Tips stimulate your own leadership?
8. Which of the proposed alternative conference formats have you practiced, and which ones grab your interest to try in order to become more learning focused.
9. Protocols (210-208) offer promising structures to scaffold and guide conversations about data. The “Leader Alert” (202) provides a caution note. Summarize the concerns.
10. Which protocols (201-208) have you used and which ones capture your interest?



FIELDWORK IDEAS



Data Collection: History of Vehicle Use #9 Vehicles Skim and Scan

Complete the Self-Assessment, exchange data and select vehicles for further study and implementation.

Data Collection: Student Interviews Choose one class ask at least 5 different students to answer this question:

“What’s the most important thing your teacher wants/wanted you to learn today?”

Record the students’ answers (or the best approximation you can get) on a sheet of paper and bring it to the next leader meeting. What are the positive implications and “early worries” about the teacher’s practice and what further data should be collected?

Application Exercise: Experimentation. Select a conference vehicle (188-201) to try out in your context and report on results.

Application Exercise: Protocols Select a protocol vehicle (201-208) and nsfharmony.org to try out in your context and report on results.



8 Collecting and Using Data: Sources

TO THINK ABOUT/TALK ABOUT

1. Summarize how grading practices can undermine student learning. (211)
2. Explain the phrase “You inspect what you expect” in the context of using grading and progress reporting as a source of data for learning-focused work.
3. Scan Table 8.1 Sources of Data (212), and put an “X” in any box where you have previously used that source of data. Be prepared to explain how you have used them.
4. How would you explain to your teachers why utilizing multiple sources of data is important and which sources you have identified as being particularly significant? (Summary 240 might help.)
5. What is the connection between formative assessment and the development of Accountable Communities?
6. What position do you take on the Q-A listed regarding the use of student achievement data? (235-236)
7. Read the Principal’s Memo (240). Would you consider pushing your leadership to this level of modeling? Invent some ways your faculty could give feedback to you on your leadership

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Application Exercise: Student Interviews Use the information from the *The Student Interview*

Conference (192) the *Student Interviews* (230) and  #8 *Accountable Classroom Community*. Individuals or teams design an interview protocol, collect data and report back on the patterns observed. Consider sharing with teachers what question you will be asking students and report back to the faculty the results.

Data Collection: One Data Source Select one of the data sources listed in the chapter and have everyone collect data over a two-week period using that source. Team discusses any patterns and implications for joint action.



9 Confronting Individuals Who Undermine Learning

Facilitators Note. This chapter is intended to give leaders conviction and competence regarding confronting individuals who undermine team performance. We recommend reading selectively based on real problem cases from study group members. The first few pages (243-245) represent important common content. It is worthwhile for people to skim over all the Skillful Leader Responses even if the case cited is not a perfect match, as the strategies might be applicable to their context. Readers who remember Skillful Leader: Confronting Mediocre Teaching should be given extra credit if they remember Frank Steel from that book. Yes he was promoted despite his mediocre teaching!

TO THINK ABOUT/TALK ABOUT

1. How have you sent or been on the receiving end of messages that state clear expectations about collaboration and its impact on student learning?
2. Be prepared to respond to these questions:
 - a) Have I, and others charged with improving student learning, been clear, inclusive and candid in setting forth what the expectations will be and how they will be supported?
 - b) Are there genuine structural and resource barriers to collaboration that I have not acknowledged? (245)
How will your answers inform your vision?
3. Do any of the “underminers” profiled in the book resemble people who are currently group wreckers in your context? (246) Go to that case and examine the balance of responses (ineffective vs. effective) by you and/or others.
4. Without reading the cases, skim read the *Skillful Leader Responses*. Identify the core ideas that will be part of almost any plan of intervention. How does this inform your intervention plan?



FIELDWORK IDEAS

Case Study: Individual Team Wrecker Prepare a case study using the format of the cases in the book (Description; Challenge for Leaders and any Intervention to date (Ineffective Leader Responses and or/ Skillful Leader Responses). Get assistance from the team to develop an action plan.

Note. The following Fieldwork should be done in conjunction with Chapter 12 *Responding to Behaviors That Undermine Learning*

Case Study  #11 *Individual Case Study-Problem Solving Protocol*
Identify a case to follow for 3-4 months.

Application Exercise: Mini-Plan. A mini plan becomes an option when problems have been identified, and there is a need for directed intervention. Identify an individual who needs a “Mini Plan” level of intervention and design and carry out a plan using the models in the chapter. (379-383)



10 Improving Hiring, Induction, and Tenure Decisions

TO THINK ABOUT/TALK ABOUT

1. What are your biases? Be ready to share your biases from the list on (282) or others. What are your drop dead non-negotiable “would not hire ifs?” **Note.** Biases are not inherently bad but they may narrow your range of selection vision.
2. Read and respond to Debilitating Belief 1 (282). Have you ever made a snap decision hire based on impressions but lacking insufficient data? Explain how Driving Belief 1 (284) (considering several sources of data) helps to counter quick impression hiring.
1. Read over the Hit or Miss Hiring rationales listed on 284-285. Have you been guilty of any of these transgressions by settling for second best hires? Think about the circumstances.
2. What is your reaction to the footnote on the bottom of (283)?
3. What incentives can you/have you established for attracting/retaining strong candidates beyond financial compensation? (286-289)
4. For purposes of discussion, select the three most important criteria from the lists on 290 and 291. Are there other criteria you would add?
5. What are two to three key ideas, which fill gaps in your hiring procedures? (293-298)
6. To what extent are you impacted by any of the Unpromising or Promising Practices listed on 298-302?



FIELDWORK IDEAS



11 Principal Development and Support



FIELDWORK IDEAS



12 Responding to Behaviors that Undermine Learning

Facilitators Note. This chapter maybe read in conjunction with Ch 9 Confronting Individuals Who Undermine Learning.

TO THINK ABOUT/TALK ABOUT

1. Summarize the circumstances when you would utilize progressive discipline vs. evaluation and supervision procedures. (361)
2. How would you describe “Green Zone” intervention and accountability mechanism? (362)
3. Describe the conditions where supervisors need to move to “Red Zone” and the 3 categories of intervention. (363-364)
4. Do you ever fall into the trap of making “vague, gentle suggestions” or “soft follow-up” or written “happy ending” paragraphs which are not sufficiently directive to ensure follow-up? (365 & 368) If so, what were they?
5. Explain the key considerations in addressing the authors’ call for “. leaders need to pay attention to the forces that impact motivation and work to enlist ownership” (378-379)
6. What explains the fact that very few teachers are ever identified to be put on formal assistance improvement plans? (384)

FIELDWORK IDEAS

Application Exercise: Mini-Conference. Using the organizing protocol on 366, select a teacher with whom you can have a collaborative conversation. Observe a lesson for 15 minutes. Organize a mini-conference by creating and asking 2-3 data based questions. Be prepared to report on whether you were able to promote reflective responses.

Case Study: Escalated Intervention Identify an individual who is undermining team performance and initiate a “first meeting” (370-372). Be prepared to share the teacher’s response and follow-up behavior. Determine whether there needs to be a “second meeting” and then follow-up if needed. Use models as necessary. (372-376).

Case Study: Mini-Plan Identify an individual who needs a “Mini Plan” level of intervention and design and carry out a plan using the models in the chapter (379-383)

Case Study: Using  #11 *Individual Case Study: Problem Solving Protocol.* Identify a case study to follow for 3-4 months.



13 Influencing Contracts and Collective Bargaining









MALFUNCTIONING COMMUNITY CASE STUDY Problem Solving Protocol

Developed by Alexander D. Platt and Caroline E. Tripp
Ready About Consulting 2010

Purpose: To provide administrator teams with a protocol to design intervention for cases of malfunctioning team performance. A leader presents a case to a team of peers for feedback and assistance. This structure also helps to build accountable leadership communities. **Note:** Start with a "generic" case--one that does not necessarily have overwhelmingly complicated or unique problems so that discussion can apply to other cases.

Instructions for getting started:

1. Allocate 60-90 minutes for session.
2. Divide group into Help Teams (SOS) of 4-5.
3. Establish two roles in each group:
 - Presenter: Presents the case and asks for feedback and assistance.
 - Facilitator: Keeps group on task, enforces rules, keeps focus on steps.
4. Groups determine how many people will present (Allocate about 20 minutes per case).
5. Agree on order of presentation.

Presenter should:

- Describe gaps in performance in relation to identified 3 C's.
- Cite/share any supporting data (requires advance preparation).
- Describe interventions to date, if any.
- Refine statement(s) of problem(s)/Goal/Action Steps/Data to be collected as needed. (See the Worksheet following)
- With help of SOS team, decide on next steps.
- Plan to report back at next session.

Participants should:

- Ask questions to clarify the problem.
- Stay focused on defining/clarifying problems goals, action or data.
- Help presenter assess whether more data is needed to define problem.

Group Facilitator should:

- Monitor process through the following questions:
 - Do we have a clear statement of the problem(s) upon which to design a plan?*
 - Is the data lined up with the goal so it can be used to assess progress?*
 - Is there any other data needed to complete the problem definitions?*
- Watch time and keep people on track.
- Interrupt presenter if presenter is getting too wordy and is straying from focus.
- Keep discussions on defining/describing before solving.





MALFUNCTIONING COMMUNITY CASE STUDY: Worksheet

1. Check off the descriptor that best characterizes the community you have chosen for your case.
 Toxic Laissez-Faire Congenial Collaborative Accountable
2. Identify the relevant gap (s) in performance, 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.*
3. Define the impact on student learning. Who is losing out? How is the team missing opportunities to scale up learning for all students? e.g.
 - *As a result the time spent during PLC time is not directed toward impacting student learning.*
 - *Thus students are receiving varying qualities of the implemented curriculum and their success depends on whom they get as a teacher.*
4. Describe data collected about and/or efforts to change the team's performance to date. Include confessions that sound something like the "Ineffective Leader Responses" cited in Chapter 5.
5. Select action steps from the repertoire of development and intervention strategies in chapters 4 and 5 and from colleague's suggestion.

Initial Questions to Guide Action Planning

- *Are the control conditions of time, space, and agenda in place? See SLII Chapter 4: "Community Building 101: Setting the Stage" 71-76.*
- *Does the team have a clearly developed set of norms consisting of values, procedures and skills? (See www.ready-about.com Resources)*



- Are there one or more individuals on the team who need to be coached separately from the entire team? If there is a need for individual coaching refer to Chapter 9 “Confronting Individuals who Undermine Learning.”
- Does this team resemble any of the cases in Chapter 5, and if so are there any ideas that might be a good match for this team?

6. For each action step, identify data to be collected and indicators for success, i.e. behaviors that would be positive signs of improvement, that will guide both external assessments and team self-assessments.

Action Step	Data to be Collected	Indicators for Success





SAVE THE LAST WORD

www.nsrffharmony.org/protocol/doc/save_last_word.pdf

Count off A-B-C-D-E etc.

“A” reads one passage that s/he found significant but does not say anything more.

“B” comments on the passage A read.

“C” comments on the passage A read.

“D” comments on the passage A read etc. until everyone but A has spoken about the passage.

“A” makes final comments on the passage and what others have said, i.e. has the last word.

B reads a passage but says nothing more.

C, D etc. comment on the passage B chose until everyone but B has spoken.

B has the last word.

Process continues until everyone has read and discussed a passage.





TAKE A SNAPSHOT of YOUR COMMUNITY DEVELOPMENT

Instructions

Fill in the names of the communities to which you belong or with which you work regularly. Use the profile descriptors from Chapter 3 to rate each group. Draw a line along the continuum to indicate the current level of development for each group. Note that you can be a member of a subgroup or an informal association and count that as a professional community, *i.e. all the people who teach Algebra I, the teachers who walk together two mornings a week and always share ideas, or a lunch bunch that routinely exchanges gripes and vents.*

Community name or brief description	Toxic	Laissez-faire	Congenial	Collaborative	Accountable
<i>e.g.</i> grade 3 team	_____				





LEADING STYLES

Reference: Ch 6 “Moving Communities from Collaborative to Accountable”

Purpose: This set of interview questions gives leaders a chance to reflect on whether their skills and styles are better matched to being a Transitional or Capacity Building leader.

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?
*Have you initiated most of the reform initiatives at your school?
 At this stage would your initiatives collapse if you left your position?
 Explain how you have built structures or capacity to sustain reform initiatives.*
3. Do you spend time and energy developing the skills of building leaders?
4. How do you balance the need to make quick decisions with the need to involve people in those decisions?
5. How do you view your role as a change leader relative to adaptive vs. technical change?
6. How do you respond to staff conflicts or difficult interactions about goals, programs, instructional strategies, or student opportunities to learn?
7. We hear a great deal about the importance of the transparency of the process of school improvement. What does this mean to you?
8. What are some of the specific ways in which you establish norms for teams and teacher leaders to be held accountable for their work?
9. Which of the following best describes the purpose of your Instructional Leadership Team (ILT)? Rank order 1-7
 - Sounding board for my leadership ideas
 - Planning structure for the 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
10. Describe how you select teachers for your ILT.
11. Identify any personnel impediments to a high functioning ILT. Have you given feedback to any individuals who have undermined team effectiveness?





CREATING A VISION FOR COLLABORATION

Instructions. 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 an adult learning team or Professional Learning Community (PLC) for the first time. After reading and evaluating these statements, draft your own statement and be prepared to share it with a group of colleagues

- 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 PLC’s 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?”





SURVEY of COMMUNITY COMPETENCE

Purpose: Allows members to self assess their own team performance

Instructions: Individually assign a rating to each indicator under the specific competencies below. Use the following scale:

Absent or Rarely Part of our Practice (I/We can cite no examples)	1
Occasional Part of our Practice (I/We can cite one or two recent examples)	2
Embedded and Regular Part of our Practice- (I/We can cite many recent examples)	3

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

Competence I: Response to Student Learning Problems

- We deal effectively with students who have not learned.
- We use coherent, mutually understood processes to define and solve problems.
- We present case study problems to one another in order to get assistance and learn from others' experiences.

Competence II: Using Standards and Data

- We use standards, benchmarks, and student achievement data to determine where we should invest effort.
- We use multiple sources of data including generating our own internal data to supplement external test data.

Competence III: 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 the hard-to-face facts and feelings. We confront the silent “elephants.”
- We identify and drop practices that are not working.

Competence IV: 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.

Competence V: 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.

Competence VI: Constant Learning

- We regularly examine and make changes in instructional practice.
- We regularly monitor our efforts by asking, “What is working? What needs revision?”





COMMUNITY DEVELOPMENT: RATING YOUR CAPACITY

Purpose: Allows members to self assess their own team performance in more detail than Tool #6.

Target for Rating: (Circle one.) District School Team/Dept (Designate) Other

Instructions: Rate each capacity on a scale of 1 to 4 as follows:

The lack of this capacity currently undermines functioning	1
This capacity is not in place or is very uneven	2
This capacity is somewhat in place	3
This capacity is totally in place	4

CONTROL

1. Common Planning Time

We have time allocated during contract time dedicated to problem solving around teaching and learning.

1 2 3 4

2. Space

We have a space that is conducive to face-to-face conversations and materials to support adult learning.

1 2 3 4

3. Technology

We use technology effectively to communicate between meetings.

1 2 3 4

4. Agendas and Roles

We have agendas prepared in advance and delegate leadership roles e.g. facilitator, note taker, timer etc.

1 2 3 4

5. Monitoring systems

We have systems for assessing our work such as the principal reviewing agendas and meeting summaries and giving feedback.

1 2 3 4

Overall Rating for Control

1 2 3 4

Comments:



CONVICTION

1. Ability to Learn Belief

We have a strong-shared belief that with good teaching all students can achieve at high levels. We believe one can “get smarter” both as a student and as an adult who is trying to help students. Intelligent behavior can be developed through effective effort, i.e. through hard work, use of strategies and investment of time. If we work together effectively, we are likely to be smarter than if we struggle alone.

1 2 3 4

2. Need for Autonomy vs. Collective Commitment

We endorse the idea that if we are going to truly impact student learning we need to sacrifice some of our classroom autonomy.

1 2 3 4

We live out the belief that if we make common agreements, members are accountable to the group for implementing these agreements.

1 2 3 4

3. Urgency and Hope

We believe that we cannot wait for future teachers to make a difference. Kids are losing out. However, if we support each other, we really can impact our students. This shared sense of urgency leads to higher expectations and more academic rigor for all students.

1 2 3 4

We feel and demonstrate a moral and ethical obligation to hold onto hope even when causes seem difficult.

1 2 3 4

Overall Rating for Conviction	1	2	3	4
--------------------------------------	----------	----------	----------	----------

Comments:



COMPETENCE

1. Response to Student Learning Problems

We deal effectively with students who have not learned. We use coherent, mutually understood processes to define and solve problems. 1 2 3 4

We present case study problems to one another in order to get assistance and learn from others' experiences. 1 2 3 4

2. Using Standards and Data

We use learning standards, benchmarks and student achievement data to point out where we should invest effort. We use multiple sources of data including generating our own internal data to supplement external test data. 1 2 3 4

3. 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.” 1 2 3 4

We identify and drop practices that are not working. 1 2 3 4

4. Establishing and Enforcing Norms

We have developed and publicly post our norms of interaction. We monitor how we are doing at honoring our norms periodically. 1 2 3 4

5. 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. 1 2 3 4

6. Constant Learning

We regularly examine and make changes in instructional practice. We regularly monitor our efforts by asking, “What is working? What needs revision?” 1 2 3 4

Over all Rating for Competence 1 2 3 4

Comments:





RATING A TARGET COMMUNITY

To be used with Chapter 4 *The Skillful Leader II: Confronting Conditions That Undermine Learning* (2008)
www.ready-about.com

Instructions: Choose a target community—school, team or grade level. Check off where you would rate that community as you read Chapter 4.

CONVICTION: *Holding and consistently acting on a set of beliefs or stances that move the school or institution closer to its mission of making sure children learn and achieve at high levels.*

	1 Debilitating	2	3	4 Driving
Ability to Learn				
Expectations for Expertise		Teacher		
Autonomy vs. Collective Commitment				
Ownership and Responsibility for Results		Mediocre Learning		
Urgency and Hope				

Total Points _____

Conviction Summary

- 5-12 **Failed Conviction Check-** Beliefs certain to undermine learning—definite intervention needed
 13-16 **Passed Conviction Check with Reservation.** Beliefs need tuning
 17-20 **Excels in Conviction**—Work on Competence!!

List intervention and development ideas that might help you (see pp. 58-64)



COMPETENCE: *Having and using a repertoire of skills and substantive knowledge about effective collaboration/teamwork and adult interaction having and using problem-solving skills to address student-learning needs.*

Readers will need to go back to pages 40-46 to rate the skills set.

	Skillfree 1	Few skills 2	Skill evident 3	Highly skilled 4
Taking on the Tough Stuff				
Developing Problem Solving and Decision making				
Anchoring the Work				
Sustaining Transparency				

Total Points _____

Competence Summary

- 4-8 **Failed Competence Check** - not skilled enough to impact student learning—definite intervention needed
- 9-12 **Passed Competence Check with reservation.** Skill work needed
- 13-16 **Excel in Competence**—Arrange visits from less skillful teams.

List intervention and development ideas that might help you (see pp. 64-71)



CONTROL: Adequate structures, processes and resources to support groups charged with improving student achievement and carrying out the mission of the school.

	Completely undermines learning 1	Partially undermines learning 2	Partially supports learning 3	Major supportive factor 4
Nuts and Bolts				
Focus of Effort				
Influence and Authority				
Incentives, Rewards and Sanctions				
Freedom from Distraction				
Alignment				

Total Points _____

Control Summary

- 4-8 **Failed Control Check-** not skilled enough to impact student learning—Definite intervention needed
- 9-12 **Passed Control Check with reservation.** Skill work needed
- 13-16 **Excel in Control**—Arrange visits from less skillful teams.

List intervention and development ideas that might help you (see pp. 71-76)

Community rating (optional)

Toxic	Isolated/LF	Congenial	Collaborative	Accountable	NR

First Steps/Next Steps





#9 VEHICLE SKIM and SCAN

Purpose: This survey serves to activate prior use of data vehicles

Instructions: Complete self-assessment below by scanning and rating the list of data vehicles on p 173.

Have used not at all =0

Have used a few times =1

Use regularly =2

Curious to Learn More ***

VEHICLES	Learning-Focused Evaluation	Learning-Focused Supervision	Collaborative Problem Solving
I. Classroom Observation	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
A. "Enhanced Formal"			
B. "The Walk"			
C. Room Tours			
D. Peer Observation			
II. Non-Classroom Observation			
A. Team Collaboration			
B. Interactions Outside CR			
III. Conferences	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
A. Videotape			
B. "Reading the Walls"			
C. Student Interview			
D. Assessment of Learning			
E. Student-led Portfolio			
F. Document or Artifact			
G. Data-use			
H. Professional Learning			
IV. Protocols	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
A. Collaborative Assessment			
B. Consultancy			
C. Collaborative Coaching and Learning			
D. Lesson Study			





#10 CRITERIA FOR THE ACCOUNTABLE CLASSROOM

Purpose: This resource helps leaders expand their skill in collecting learning focused data from students. The questions are organized around criteria associated with high levels of student learning. We recommend collecting data on two or three criteria and identifying 2-6 questions to ask.

Criteria #1 – **Students know that they get smarter by learning strategies and working hard.**

There is a culture of effective effort where students do not attribute their success to native ability or external factors (luck or task difficulty) but to working hard and smart.

Questions to ask students

1. What explains how to be successful in this classroom?
2. What happens if first you do not succeed?
3. What is the relationship between your ability, your effort and success?

Criteria #2 **Students know the instructional objective, the relevant standard and the lesson connection to prior and future learning.**

Posting standards and objectives on the blackboard or wall may be a starting point it, but it by no means guarantees that students understand or own the learning. Ownership of learning requires student knowledge of “Connection and Destination” information.

Questions to ask students

1. What are you working on?
2. What’s the most important thing your teacher wants/wanted you to learn today?”
3. Can you tell me the purpose or objective of this lesson?
4. What are you learning and why is this important to learn?
5. Can you tell me the connection between the activity you are doing now and what you are supposed to be learning?
6. What will you be able to know or do when you have completed this activity?
7. What learning standard(s) are you working on?
8. What skills or knowledge have you learned in order to be successful on this work?
9. What will you do next?

Criteria #3 - **Students share significant responsibility for monitoring their own progress.**

Questions to Ask Students (Note: Some of these questions adapted from Stiggins Classroom Involved Classroom Assessment 2001)

1. How you know when you are successful?
2. What do you do when you are confused? Or how do you get help to succeed?
3. What do you do when confronted with difficult tasks?
4. How do you learn best? What helps you to learn?
5. Are there practices and routines in place for you to keep track of your own learning?
6. How do you keep track of your progress?
7. Do you maintain any journals, logs or notebooks or portfolios?



If so....

- Does your teacher collect them and make comments?
- How are these products helping you learn?

Criteria # 4- Students have “no secrets” re: how they are assessed and graded practices (“opaque free” grading).

Questions to Ask Students

1. How does the teacher balance rewarding you for effort vs. rewarding you for succeeding?
2. To what extent do you get rewarded (graded?) for trying?
3. What happens when you do not finish your work—homework for example?
4. How often do you get to demonstrate your learning?
5. What are the term grades based on?
6. How are you being graded? (Note. You want to determine whether it is in comparison to other students or in relation to a standard.)
7. Can you describe different ways you are graded?

Criteria # 5 Students learn tools and strategies to help them transfer skills to independent and non-routine application.

Questions to Ask Students

1. What skills are you using to carry out this task?
2. What skill are you practicing now?
3. What are you learning how to do?
4. How did you learn how to do this?
5. Do you use this skill (e.g. comparing and contrasting) in other classes/subjects? Explain.
6. Do you learn how to ask and answer difficult questions? Explain.
7. Beyond today, can you name some of the skills you have been learning this year?

Criteria # 6 - Students use models and exemplars to learn criteria for high quality work and are involved in the development of criteria for success.

Questions to Ask Students

1. How does your teacher decide which work is posted? (Assuming work is on wall)
2. How does your teacher provide you with examples of good or poor work to help you understand the quality they expect?
3. In what ways have you participated in deciding what good work looks like?
4. Do you ever get a chance to evaluate other students’ projects? Explain
5. Do you ever get an opportunity to develop rubrics?

Criteria #7 - Students are getting frequent feedback in relation to reaching standards and students know that success is defined in relation to criteria and standards rather than in comparison to other students.

Questions to Ask Students:

1. How does your teacher let you know how you are doing?



2. Can you show me some examples of ideas for improvement given by your teacher?
3. How often does your teacher collect and comment on (your journal, notebook etc.)?
4. How will you know how good your work is and how you can improve it?

Criteria #8 - Students demonstrate how to collaborate independently of the teacher and use skills of active listening and questioning.

Questions to Ask Students

1. How do you learn how to work together and communicate?
2. How do you know if you are successful in communicating in your group?
3. How are you held responsible for your contribution to a group?
4. How are you taught to ask good questions?

Criteria #9 Student work is rigorous and relevant.

Questions to Ask Students

1. Do you find this work easy or difficult? Explain
2. Please tell me about something today or the last few weeks that you found difficult to learn? Did you work through it? Were you successful? What accounts for your success (or failure)? What did you learn about yourself during this time?
3. How does your teacher help you learn something difficult?
4. Does the teacher make clear connections between learning and “real life” applications.
5. Why is this work important?
6. What is difficult about this work?
7. What happens when you fail to complete an assignment?
8. What happens when you do not finish your work?
9. Can you give an example of something you couldn't do before but now can now do well?
10. In what ways are you challenged to think in this lesson?

Criteria #10 Students share responsibility for assessing and presenting their own learning and for setting and assessing goals.

Questions to Ask Students

1. Do you have opportunities to demonstrate your learning in front of an audience—peers, parents or other adults?
2. Do you ever participate in parent-teacher conferences?
3. How will you apply, assess, or communicate what you've learned?
4. Do you set goals for aspects of your work? Can you show me an example? Do you come back and evaluate how you are doing?





#11 PET PEEVES RE GROUP WORK

Instructions: Please rate the following peeves according to the degree to which they annoy you or represent an ongoing irritant in your work setting. Use “3” for your biggest peeves, “1” for those that are less bothersome and “0” for any circumstances that rarely or never occur in your experiences with groups. As a starting point for setting norms or assessing group process, a facilitator can compile this survey.

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





#12 INDIVIDUAL CASE STUDY Problem Solving Protocol

Developed by Alexander D. Platt and Caroline Tripp Ready About Consulting 2010

Purpose: To provide administrator teams with a protocol to design intervention for cases in cases of mediocre performance. The goal is improvement not removal.

Instructions

1. Allocate 60-90 minutes for session.
 2. Divide group into Help Teams (SOS) of 4-5.
 3. Establish two roles in each group
 - i. **Presenter**--Presents the case and asks for feedback and assistance
 - ii. **Facilitator**--Keeps group to task, enforces rules, keeps focus on steps.
 4. Groups determine how many people will present. (Allocate about 15 minutes per case).
 5. Agree on order of presentation
- Note:** Start with a "generic" case--one that does not necessarily have peculiar unique problems so that discussion may apply to other cases.

Presenter should:

- Describe gaps in performance in relation to identified standards. Cite/share any supporting data (requires advance preparation).
- Describe interventions to date, if any.
- Refine statement(s) of problem(s)/Goal/Action Steps/Data to be collected as needed. (See worksheet below.)
- With help of SOS team, decide on next steps.
- Plan to report back at next session.

Participants should:

- Ask questions to clarify the problem.
- Stay focused on defining/clarifying problems goals, action or data.
- Help participant assess whether more data is needed to define problem.

Group Facilitator should:

- Monitor process through the following questions
 - a. *Do we have clear statement of the problem(s) upon which to design a plan?*
 - b. *Is the data lined up with the goal so it can be used to assess progress?*
 - c. *Is there any other data needed to complete the problem definitions?*
- Watch time and keep people on track
- Interrupt presenter if presenter is getting too wordy and is straying from focus.
- Keep discussions on defining/describing **before solving**.





#11 INDIVIDUAL CASE STUDY Problem Solving Protocol

Worksheet

I. Identify relevant performance standard that is not being met.

II. Clearly define case problems (Write problem statement as two sentences: Sentence #1 gap from a standard; #2 impact on student learning).

III. Translate into a specific and measurable Goal.

IV. Select Action Steps

V. Match each action step with Data to be Collected Note: the teacher should collect most of the data.

VI. Identify Indicators for Success (What would be positive signs of moving toward the goal?)

IV Action Step (time table)	V. Data to be Collected	VI. Indicators for Success

