Literacy Improvement
PARTNERSHIP

Facilitating Improvement in Teacher Practice

Learning Module 3 Workbook

Leading Improvement Work

Acknowledgments

This module series includes work that has been adapted from successful strategies developed by Alicia Bowman and Kim Austin for the Regional Education Laboratory West (REL West) at WestEd. We would like to acknowledge the Center for the Collaborative Classroom and Washoe County School District in Reno, Nevada, for their partnership in this work. We would also like to acknowledge the Carnegie Foundation for the Advancement of Teaching for its contributions to the field that are cited in this work.

Alicia Bowman and Kim Austin at WestEd developed these workbooks as supplemental materials to the *Facilitating Improvement in Teacher Practice* slide decks developed under REL West.

WestEd.org

Table of contents

Module 3 learning targets and agenda

Learning targets:

- Understand the role of the facilitator in leading improvement work.
- Learn about some key strategies for facilitating and developing teams.
- Learn about some key routines and structures for continuous improvement.

Agenda

	Key content
Opening	• Welcome • Logistics
Part 1	• Leading improvement work • Team development • Promoting positive group dynamics
Part 2	• Meeting planning and facilitation • Meeting routines in action: Learning huddles
Closing & Next Steps	• Module review • Action period work

Leading improvement work

Leading improvement works means that you are supporting the continuous improvement of how teachers work together, while also supporting them to continuously improve their practice and their system.

Self-Reflection

What are my strengths in working with groups?

What are my strengths in working with groups?

What are my strengths in working with groups?

Leading an improvement team

As a facilitator, you are creating the conditions and holding space for teams to complete inquiry cycles. This requires the facilitator to do the following:

- ❑ Plan and facilitate meetings.
- ❑ Manage group dynamics.
- ❑ Provide structure and guidance for inquiry cycles.
- ❑ Plan and structure learning huddle protocols for your teams.
- ❑ Support data collection and documentation of learning.
- ❑ (Optional) Build a community of team leads.

Key attributes of an improvement team:

- Improving your system.
- Continuous improvement and inquiry.
- Learning together.
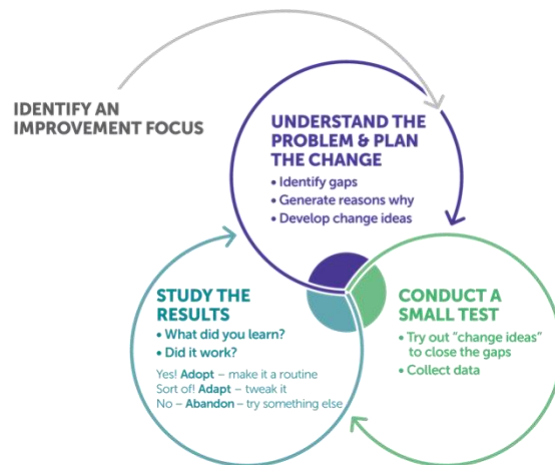- Measuring results.
- Celebrating success.
- Sharing your learning.

Teacher inquiry cycle

Teacher inquiry is defined as a systematic, intentional study of one's own professional practice.*

The most effective way to learn is collaboratively. Supporting effective teacher inquiry involves both facilitating routines and facilitating team collaboration.

IDENTIFY AN IMPROVEMENT FOCUS

UNDERSTAND THE PROBLEM & PLAN THE CHANGE
- Identify gaps
- Generate reasons why
- Develop change ideas

CONDUCT A SMALL TEST
- Try out "change ideas" to close the gaps
- Collect data

STUDY THE RESULTS
- What did you learn?
- Did it work?

Yes! **Adopt** – make it a routine
Sort of! **Adapt** – tweak it
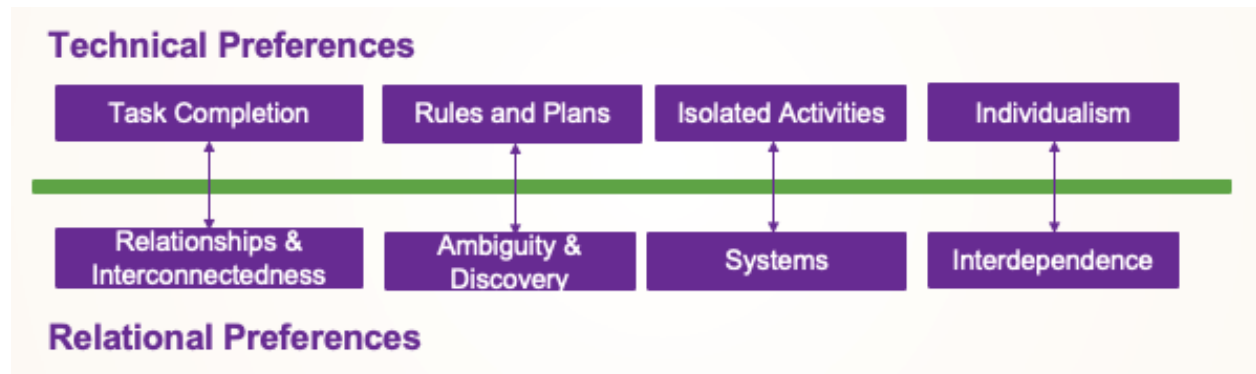No – **Abandon** – try something else

How have you engaged in teacher inquiry in the past?

What did you learn from that experience?

As we discussed in Module 2, our mental models can shape how we react to and attempt to solve problems. As a facilitator, you need to be aware of your natural reactions to stress, which can impact your decisions and behaviors while working with teams.

Every team member has mental models about how meetings should be designed and experienced. These mental models over time become preferences. The further a meeting is from your preference, the harder it is to stay engaged. When team members share similar preferences, team meetings tend to naturally go smoothly. When team members have opposing preferences, there tends to be more dysfunction. A facilitator needs to understand the preferences of team members and intentionally design and facilitate meetings to manage the differences.

Technical Preferences

Task Completion	Rules and Plans	Isolated Activities	Individualism
Relationships & Interconnectedness	Ambiguity & Discovery	Systems	Interdependence

Relational Preferences

What are your preferences as a team member? How might your natural preferences impact your facilitation when under stress?

When facilitating a team, remember:

- Understand your tendencies and the tendencies of your team members.
- Structure activities to vary to meet different needs.
- Acknowledge when activities may be outside the comfort zone of some team members.
- Check in with your team regularly to make sure their needs are being met.

Team development

> *"In great teams, conflict becomes productive. The free flow of conflicting ideas is critical for creative thinking, for discovering new solutions no one individual would have come to on his own." –Peter Senge*

A group of people, even if they have a common purpose, are not necessarily a team.

All teams have ups and downs, and as a facilitator, part of your role is to help the team to continue to develop.

Conflict in teams is natural …

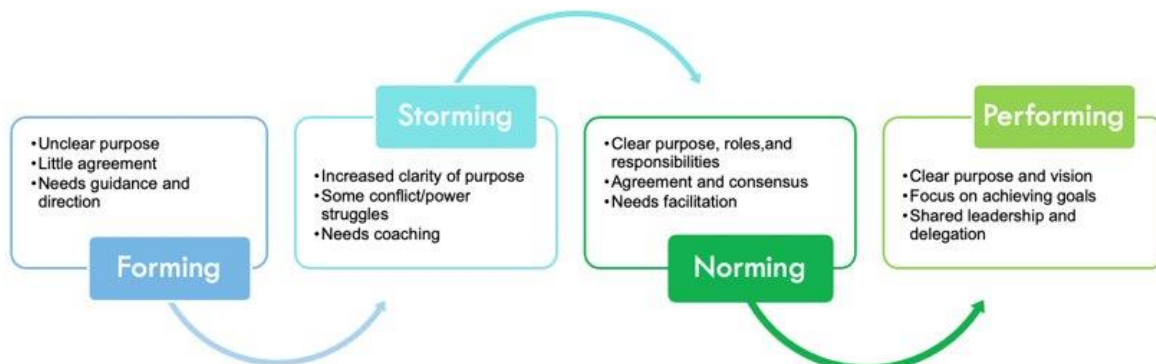| Healthy Conflict	Unhealthy conflict
- Focus on task issues. - Legitimate differences of opinion about the task. - Differences in values and perspectives. - Different expectations about the impact of decisions	- Competition over power, rewards, resources - Conflict between individual and group goals - Disorganized team meetings. - Community agreements unestablished or not honored. - Personal grudges from the past. - Faulty communication.

Teams go through different stages of development over time and in response to changes. The types of conflicts that a team is experiencing often helps to identify what stage it is in.

The stages of team development

Forming
- Unclear purpose
- Little agreement
- Needs guidance and direction

Storming
- Increased clarity of purpose
- Some conflict/power struggles
- Needs coaching

Norming
- Clear purpose, roles, and responsibilities
- Agreement and consensus
- Needs facilitation

Performing
- Clear purpose and vision
- Focus on achieving goals
- Shared leadership and delegation

Facilitator actions for managing team dynamics

Forming	Storming
• Clarify group's purpose, roles, and responsibilities. • Establish community agreements. • Provide information and direction; build understanding. • Surface and be sensitive to member needs. • Encourage risk taking. • Foster communication. • Introduce routines and processes.	• Encourage multiple voices and perspectives. • Revisit purpose, roles, and responsibilities. • Review/revise community agreements. • Acknowledge conflict when it occurs. • Seek and provide information and clarity. • Redirect conversations to community agreements/goals.

Norming	Performing
• Request and encourage feedback on your facilitation. • Monitor participation to delegate and share responsibility. • Continue to revisit and update community agreements. • Recognize accomplishments. • Monitor team effectiveness and morale. • Encourage collaboration inside and outside of the team meetings. • Identify learning opportunities.	• Celebrate and publicize accomplishments. • Identify team development opportunities. • Create space for mutual support and encouragement. • Establish flexible roles and shared leadership. • Evaluate team effectiveness and morale.

Which of these stages do you feel your team is currently experiencing? Are your internal conflicts healthy or unhealthy?

"Narratives are shaped by mental models, but narratives also, over time, shape the mental models we have." - The Water of Systems Change (2021)

Two researchers from Harvard University, Keegan and Lahey, have spent decades studying discourse and how it shapes behavior. In their book *How the Way We Talk Can Change the Way We Work: Seven Languages for Transformation*, they introduced some of the patterns people use when they talk about problems unproductively and productively. Three of the seven examples align with the ways individuals in teams can, sometimes unconsciously, express themselves in unproductive ways when discussing challenging situations.

Language of complaint (unproductive)	Language of commitment (productive)
• Expresses what we cannot do.	• Expresses what we aspire to or stand for.
• Sounds negative or cynical.	• Communicates conviction or possibility.
• Frustrates individuals or shuts down the conversation.	• Inspires and brings energy to the conversation
• Nontransformational: lets off steam, but does not help move toward solutions.	• Transformational: builds a foundation for purpose-driven work.

Language of blame (unproductive)	Language of personal responsibility (productive)
• Holds other people responsible for gaps between intentions and reality.	• Generates productive conversations that lead to problem-solving.
• Built on generalizations and alienation of others.	• Draws on our commitments and encourages collaboration.
• Discourages exploration	• Raises questions to be answered.
• Nontransformational: deflects attention to outside of the locus of control.	• Transformational: directs attention to where we have the most influence.

Language of assumptions (unproductive)	An inquiry stance (productive)
• Voices ingrained mental models.	• Examines data and evidence..
• Makes unsubstantiated judgments.	• Develops a logical hypothesis.
• Includes broad generalizations.	• Looks at individual contexts and situations..
• Nontransformational: reframes problems based on past experiences instead of reality.	• Transformational: gets to the root causes of problems using evidence..

Shifting group discourse

From complaint to commitment	The language of complaint surfaces frustration, while also demonstrating that people care about something. Shifting this discourse often involves surfacing what the speaker cares about.
From blame to personal responsibility	The language of blame surfaces an expression of helplessness. Shifting the discourse often involves helping the speaker locate where they have agency.
Language of assumptions to an inquiry stance	The language of assumptions voices the mental models built from our experiences or structurally built into our systems. Shifting the discourse often involves using data and evidence to drive discussions.

Discourse sort activity

You will now read a series of quotes from education settings and, in a small group, sort your quotes by the "language" that is represented.

- Language of complaint.
- Language of commitment.
- Language of blame.
- Language of personal responsibility.
- Language of assumptions.
- Inquiry stance.

Quotes for this activity are in Appendix 1. As you discuss each of your assigned quotes, share why you believe it is in a particular language, and if it is unproductive language, what you might say to help shift the discourse.

EQUITY

II

PAUSE

Take a moment to think about the discourse around inequities in your school or district.

- What types of discourse do you hear most frequently?
- Can you think of a time when unproductive discourse has been a barrier to addressing an equity issue?

Begin with listening . . .

- When listening to unproductive discourse, we often make judgments.
- This "fast thinking" may cause us to react in ways that are counterproductive to our goals.
- To shift unproductive discourse, you need to listen without judgment.

Meeting planning and facilitation

Self-Reflection

What types of meetings do you usually plan? How do you know they are successful?

As you are thinking about meeting planning and facilitation, you need to keep in mind the type of meeting you are planning for as well as how you will know if your meeting is successful. Some common types of meetings you may need to plan are these:

- **General team meetings:** plan initial inquiry, reflect on and share learning
- **Learning huddles:** maintain progress for ongoing inquiry, share early learning, make necessary adjustments, and articulate next steps
- **Check-in meetings:** check in on progress of inquiry and troubleshoot issues

Meeting success goes beyond "getting through the agenda." As you think about what success would look like, consider both your team dynamics and the engagement opportunities for individual team members. It is recommended that, like community agreements, meeting success criteria be customized in collaboration with your team. Some examples of meeting success criteria to begin with are shown in the text box.

Meeting planning and facilitation process

Meeting planning is an ongoing process that includes its own improvement cycle. There are facilitator tasks that take place before, during, and after each meeting. There is also learning from each meeting that informs how future meetings will be designed and facilitated.

> Meeting success criteria
>
> 1. Come prepared.
>
> 2. Listen actively, attentively.
>
> 3. Maintain a positive group dynamic (verbal and nonverbal).
>
> 4. Stay focused and on task.
>
> 5. Complete all meeting objectives.
>
> 6. Ensure equity of voice (everyone is given the opportunity to speak).

Before the meeting: Planning and materials development

Meeting planning checklist

- ❑ Create a facilitator's agenda.
- ❑ Community agreements/roles.
- ❑ Meeting outcomes.
- ❑ Activity directions based on type of meeting (general, learning huddle, or check-in).
- ❑ Determine who will facilitate each portion of the agenda.
- ❑ Identify possible contributions from staff or bright spots that might be included in the meeting.
- ❑ Determine if any content support will be necessary for the meeting.
- ❑ Schedule a facilitation debrief meeting and prepare for any work between meetings (general or learning huddles).

Materials development checklist

- ❑ Review the facilitator's agenda to develop content slides and activities.
- ❑ Create participant agendas and handouts. (These may include a huddle protocol, note-taking documents, and so on.)
- ❑ Designate persons responsible for preparation tasks.
- ❑ Determine when materials need to be ready.
- ❑ Review materials before the meeting to ensure everything is ready.

Before the meeting: Pre-facilitation checklists

Organizational systems

- ❑ Create accountability process (products to collect, timelines, expectations).
- ❑ Identify how you will collect the team's work products and where they will be stored (online folders, binders, and so on).
- ❑ Develop team meeting feedback survey/tool.

Communication

- ❑ Identify the learning/support needs of each team member and where differentiated support might be needed.
- ❑ Check with facilitators and clarify roles and responsibilities for the meeting.
- ❑ Check in with team leads/members to make sure they know what to bring to meetings.
- ❑ Invite content specialists who may be able to support the work.

Preparation

- ❑ Review learning huddle protocol and materials.
- ❑ Add facilitation notes to a facilitator version of the protocol.
- ❑ Anticipate any possible team dynamic issues and how you might respond.
- ❑ Review the agenda and materials to make sure everything is prepared and you have enough copies.

Small-Group Activity

Look at the meeting planning, materials development, and facilitation preparation checklists in your handout.

During the meeting: Meeting facilitation processes

Open with an icebreaker or warm-up

Icebreakers and warm-ups may sometimes seem extraneous, but in fact they play an important role. They help meeting participants to have a clean break from the activities they were engaged in. This allows them to be more focused.

Depending on the activity, icebreakers and warm-ups can also be community builders.

Review community agreements

Community agreements are effective only if they are used consistently, and they are an important facilitation tool when things start going off track. Even if it feels repetitive, it is important to always remind the team of their agreements.

Initially you may want to review them and identify agreements that might be helpful for navigating the particular work of a meeting, but eventually you can ask participants to read over them on their own and identify one that they would like to focus on for themselves.

Managing multiple preferences

Build relationships:

- Allow time for individuals to transition into the meeting.
- Review community agreements.

Provide guidance and structure:

- Create clear meeting objectives and tasks.

Be goal-oriented:

- Make connections between the work of a particular meeting and the overall goals of the team.

Foster interdependence:

- Share successes and collective impacts.

15

Collect notes and artifacts

When engaging in improvement work, it is important to document you learning as you go. This documentation helps you to see the shifts in thinking, capture successes and failures, and eventually allows you to share your journey with others.

Establish and agree on clear next steps

One of the biggest pitfalls in improvement work is a lack of follow-through. It is important that everyone on the team agrees on the next steps, deliverables, and timelines. When agreements are made as a team, it creates a team culture of shared accountability.

Collect feedback

There is always room for improvement in meeting design and facilitation. Consistently asking for and acting on feedback from the team promotes agency and contributes to the collective efficacy of the team.

Which of these facilitation moves do you consider to be strengths? Which are areas of growth?

After the Meeting: Reflection and Improvement

An after-action review is an opportunity to look back on a segment of work (e.g., an entire inquiry cycle, or how you look at data) and identify successes and areas for improvement. These are some examples of improvements as a result of after-action reviews:

- changing your meeting structures, timing, or duration
- altering or replacing routines and protocols
- revisiting community agreements

After the meeting:

- ❏ Review participant feedback.

- ❏ Debrief meeting after completion with any co-planners.

- ❏ Use participant feedback and debrief to identify areas for improvement.

- ❏ Send reminders to teams regarding deliverables.

- ❏ Support data collection with suggested tools.

EQUITY ❚❚ PAUSE	Take a moment to think about the reflection and improvement process. • How can the reflection and improvement process promote equity? • Can you think of a time when it may have been beneficial to reflect and take stock of what you were doing but didn't? What happened?

Meeting routines in action: Learning huddles

What meeting routines do you usually use when you work with teams, and how are they helpful for you?

Some types of meeting routines

- Agenda structure with elements that stay constant.
- Assigning roles.
- Clear decision-making processes.
- Limited set of protocols that everyone knows how to use.
- Celebrations.
- Reflections and feedback processes.

Activity

Review and reflect on the example learning huddle agenda.

Pair Share

What routines do you see? What is this huddle trying to accomplish? Which step might be challenging for a group?

Learning huddle pitfalls

- ❑ One person is dominating the discussion.
- ❑ Discussion goes off track.
- ❑ The group is not prepared with data.
- ❑ Teachers skip over the data or take only a cursory look at their data.
- ❑ Change ideas are not clear, specific, right grain size, or actionable.
- ❑ The group has not articulated clear next steps

Different types of learning huddles

Learning huddles are embedded in an inquiry cycle, focused on a specific topic or aim, and used to facilitate a variety of conversations including:

- Planning for inquiry.
- Problem identification.
- Prototyping change ideas.
- Determining measures and data collection processes.
- Analyzing data

Choose one pitfall. What would you do before, during, or after a learning huddle to address this issue?

Learning huddle self-check

A learning huddle is a meeting, but not every meeting is a learning huddle. When planning learning huddles, make sure that they meet all of these requirements:

- ❑ Short (30-45 minutes, fits within a typical meeting time).
- ❑ Focused on a specific topic and aim.
- ❑ Guided by agenda and roles.
- ❑ Equitable (everyone shares).
- ❑ autonomous (teacher-facilitated).
- ❑ Embedded in an inquiry cycle (not stand-alone).
- ❑ Aligned to research-based practice.
- ❑ Clear next steps.

Self-Reflection

How are you currently thinking about leading and facilitating improvement work?
What specific strategies from this module do you plan to incorporate into your practice?

Next steps

During this module, our learning targets were to:

Understand the role of the facilitator in leading improvement work.

- Leading improvement work.

Learn about some key strategies for facilitating and developing teams.

- Team development.
- Promoting positive group dynamics.

Learn about some key routines and structures for continuous improvement.

- Meeting planning and facilitation.
- Meeting routines in action: learning huddles.

Action period for Module 3

Identify a team to work with.

- Optional: identify potential team leads.

Begin to create a structure for your improvement work documents.

Plan and conduct an initial team meeting.

- Assess the current systems you will be working in:
  - Develop community agreements.
  - Discuss anticipated challenges.
  - Schedule meetings.
- Get a baseline for your team dynamics:
  - Use the meeting success criteria.

Closing reflection

What are you thinking about focusing on next to continue this work?

Appendix 1: Discourse quotes for Module 3, promoting positive group dynamics

Set #1

I barely have time to teach my grade level standards, how can you expect me to teach the content they should have had years ago and do my job?	These parents need to make sure their children are prepared for school or they should expect that their child will fall behind.
So many of our students move around. How can you expect us to fill all of their gaps?	We need to focus on *motivation*, not this new curriculum! Students can't learn from us if they are not motivated to learn.
I can't seem to teach this student. I'm fairly certain she needs to be assessed for special education.	*I have been working this way successfully for many years. I don't see why I need to change now.*

Set #2

I can't seem to teach this student. I'm fairly certain she needs to be assessed for special education.	*I have been working this way successfully for many years. I don't see why I need to change now.*
If the administration would let us just do our jobs, then we would be able to teach these students.	*If we just had better attendance, students would do better in school. This is out of my control.*
There is so much violence in their lives - how can you expect them to be able to learn when they live in those conditions?	*The students don't pay attention in class. Their behavior makes it impossible for me to teach.*

Set #3

With these new standards, most of our parents can't help their children at home.	*The problem is that the students/ parents don't care.*
There is not enough time in the day to do everything that is being asked of us.	*Why are we just hearing about this now? We were not asked for our input.*
The administration just blames us for all of the problems.	*We spend too much time sitting around in meetings instead of actually doing something productive.*

Set #4

The administration just blames us for all of the problems.	*We spend too much time sitting around in meetings instead of actually doing something productive.*
They keep bringing in consultants when we have the knowledge in house to solve our own problems.	*A new leader, a new program. Well I'm going to keep doing what I'm doing because this too will pass.*
They keep asking us to do more, I don't have time for what I'm already trying to do.	*I don't see how this is going to make a difference. I don't think they even have a plan.*

Appendix 2: Meeting checklists

Before the meeting

Planning and materials development

- Meeting planning checklist
- Create a facilitator's agenda.
- Community agreements/roles.
- Meeting outcomes.
- Activity directions based on type of meeting (general, learning huddle, or check-in).
- Determine who will facilitate each portion of the agenda.
- Identify possible contributions from staff or bright spots that might be included in the meeting.
- Determine if any content support will be necessary for the meeting.
- Schedule a facilitation debrief meeting and prepare for any work between meetings (general or learning huddles).

Materials development checklist

- Review the facilitator's agenda to develop content slides and activities.
- Create participant agendas and handouts. (These may include a huddle protocol, note-taking documents, and so on.)
- Designate persons responsible for preparation tasks.
- Determine when materials need to be ready.
- Review materials before the meeting to ensure everything is ready.

Pre-facilitation checklists

- Organizational systems
- Create accountability process (products to collect, timelines, expectations).
- Identify how you will collect the team's work products and where they will be stored (online folders, binders, and so on).
- Develop team meeting feedback survey/tool.

Communication

- Identify the learning/support needs of each team member and where differentiated support might be needed.
- Check with facilitators and clarify roles and responsibilities for the meeting.
- Check in with team leads/members to make sure they know what to bring to meetings.
- Invite content specialists who may be able to support the work.

Preparation

- Review learning huddle protocol and materials.
- Add facilitation notes to a facilitator version of the protocol.
- Anticipate any possible team dynamic issues and how you might respond.
- Review the agenda and materials to make sure everything is prepared and you have enough copies.

During the meeting

Meeting facilitation processes

- Open with an icebreaker or warm-up.
- Review community agreements.
- Collect notes and artifacts.
- Establish and agree on clear next steps.
- Collect feedback.

After the meeting

After-action review

- Review participant feedback.
- Debrief meeting after completion with any co-planners.
- Use participant feedback and debrief to identify areas for improvement.
- Send reminders to teams regarding deliverables.
- Support data collection with suggested tools.

Notes

Notes