

## Facilitator Overview

Welcome! As facilitator, you will guide your leadership team through a module's Learning Experience and help ensure that work continues beyond the Experience.

Facilitation is a big responsibility. But in the end, your hard work will benefit you as well as your team. In its report on the independent evaluation of the *Success at the Core* pilot (see Bibliography), Inverness Research observes, "Even the most experienced facilitators noted that they were learning useful ways to think about and organize professional development from their experiences ... The process of learning and using the module materials made them better, more confident facilitators."

The evaluation report also shares what facilitators had to say about what they learned, in their own words:

*I have gained some knowledge and insight on how to lead a group.*

*I am a better presenter, I am more comfortable. And my planning has gotten more detailed.*

Throughout this Overview, we present more of the report's quotes from facilitators—some of whom had never served as facilitators before the pilot. Are you new to this role, too? If so, please know that you don't need to be an expert in facilitation, in quality instruction, or in leadership. All you need is the willingness to lead your colleagues, even if you are just a short step ahead of them. We provide materials that will help you every step of the way.

At this point, you probably have a lot of questions. Below, we provide answers to the following:

1. **What's my job as facilitator?**
2. **Are there tools to help me?**
3. **How can I help my team get the most out of a module?**
4. **Where do I start?**

### 1 What's my job as facilitator?

By design, a module's Learning Experience relies on effective facilitation. So what does that involve?

#### Preparing

Before each Learning Experience, you should familiarize yourself with the module. Most facilitators follow a similar preparation process:

1. **Print and read through the entire *Facilitator Guide*, and jot down notes on it**
2. **Preview the *Multimedia Presentation* and watch all of the videos embedded in it**
3. **Print *Handouts* and other materials for the team**
4. **Review each module's *Resources* to be able to recommend them to team members**

**Note:** You can access all of these italicized materials from a module's landing page.

During the pilot, facilitators reported that they spent about two hours preparing for a module when it was their first experience with Success at the Core's materials. As with so many other things in life, diligent preparation does pay off. According to the Inverness Research report:

*Those who took the longest in preparation also seemed to reap the greatest benefits both for themselves and for their teams. Conversely, those who spent the least amount of time becoming familiar with the modules reported less interest in and fewer benefits from module usage... Facilitators who spent over two hours seemed to have the deepest understanding of their schools and the needs of the leadership team. Much of their careful preparation involved making sure they gained mastery of the module materials in order to anticipate how they might be received by their particular audience. Much like exemplary classroom teachers or top notch athletes, they spent time mentally rehearsing, envisioning how the module would play out in their particular context.*

## Leading Your Team

As facilitator, you guide your team through the Learning Experience's activities, discussions, readings, and viewing activities and pace the Learning Experience to ensure that your team completes it in the time you have allotted. You also decide when and how to customize the Experience to meet the unique learning needs of your team and school.

In its evaluation report, Inverness Research comments on customization opportunities:

*Facilitators found that each LD module provides a strong skeleton or scaffold within which modifications can be made readily. They provide expansion opportunities in the form of additional resources, as well as many open doorways to other options and possible routes for leadership teams to take. Importantly then ... modules can be used as directed and they can be adjusted readily as needed.*

## Making Meaning and Taking Action

Leadership teams need to take time at the end of a Learning Experience to reflect and consider next steps. As facilitator, you will make this happen. The **Now What?** section in each module's Facilitator Guide will help you.

Saving time at the end of a module to make meaning can be a challenge. As we all know, and as Inverness Research noted in its report, "'Running out of time' is a phenomenon so indigenous to public school settings that it seems to be part of the air students and teachers breathe." Thus, it's all the more important to give time to the important work of reflecting on the experience, planning next steps, and mapping out specific follow-up activities. For this reason, we recommend stopping a module's Learning Experience 20 minutes prior to the end of your allocated time—regardless of where you are—to complete the **Now What?** APPLY activity.

## 2 Are there tools to help me?

Yes! Each module includes tools to ensure that you and your team are successful and productive. You can access these tools on each module's landing page on the website.

### Essential Tools

#### Multimedia Presentation

Each module includes a Multimedia Presentation—an interactive, slide-based presentation that organizes and orders the entire Learning Experience. It includes video, activities, and discussion questions—everything that you need to guide your team through the module. Launch this presentation from the module's landing page at the beginning of the Learning Experience and use it to guide your team through the entire 120- or 180-minute experience.

Visit the *Frequently Asked Questions* page (accessed from the Home page) if you have trouble launching the presentation.

## Facilitator Guide

The Facilitator Guide provides step-by-step instructions for leading your team through every slide in the Multimedia Presentation. It also offers suggestions for how to customize the experience. You should carefully review the guide prior to gathering your team for the Learning Experience and print it out so you can use it during the meeting. You can access the Facilitator Guide on the module's landing page.

The Inverness Research evaluation report shared the following thoughts from pilot facilitators about these guides:

*The Guide is excellent ... everything is all there for us. This is such a good model of preparation and organization for us to use in our other team leader meetings.*

*The Facilitator Guide is very helpful. The suggestions are good. It's clear the developers know what they're talking about.*

*Very helpful! The guides to all of the modules are really valuable. They validate some approaches to working together that we have been using for a while, but they are also giving me new protocols and new ways of having folks look at things together.*

All facilitator guides follow the same structure. Each includes:

- **Background:** A paragraph on how the content of the module relates to your team's work
- **Prepare:** A description of what you need to do before your team meets for the Learning Experience
- **"At-a-Glance" Text Boxes:** Quick overviews of each section of the Learning Experience, including its proposed length and the materials used
- **Video Text Boxes:** Previews of the video's content (About the Video) and highlights of how the video relates to the viewing questions provided in each VIEW activity (More Information)
- **Note:** Tips to help the Learning Experience run smoothly, including suggestions on customizing the module and pointers about what to anticipate
- **Consider This:** Facilitation and discussion suggestions that offer ideas on how you can adapt activities to meet your team's specific needs
- **Bibliography:** Sources used to develop the Learning Experience

The Facilitator Guide also provides suggested times for each of the activities in the Learning Experience. These estimates will help you pace your team to complete a module in 120- or 180-minutes. We learned from the pilot that these time estimates are realistic. However, a module's activities will likely spark rich discussions that can extend a Learning Experience. As facilitator, you will need to determine when and how often you want to extend the discussion in support of team learning and action. (You might want to have someone act as timekeeper to help you with pacing and making decisions about which activities you might want to extend.)

The Multimedia Presentation and Facilitator Guide refer to handouts that your team will use during a Learning Experience. You can preview and print these handouts from the Facilitator Guide page in each module. Handouts include:

- The Learning Experience agenda
- Readings with reflection questions
- Activities for individual and team use
- "Next Steps" for identifying and planning follow-up activities

## Tools to Enrich a Learning Experience

Use these materials to deepen your team's understanding of the content.

### Assessment Tool

Each module includes a short assessment that allows you and your team members to reflect on your knowledge and skills around a module's topic prior to a Learning Experience. This 9-10 item assessment is keyed to the three learning goals, asking each individual to respond with a 1-5 Likert scale rating.

As facilitator, your team's assessment results can help you customize the Learning Experience. You may choose to use the results in several ways:

- Modify the pacing of the Learning Experience, spending more time on learning goals where your team members' knowledge/skills are weaker and less time on goals where their knowledge/skills are stronger
- Ask team members to review one or more suggested resources from the module before you gather for the Learning Experience
- Allot more time for the Learning Experience to provide opportunities for extended discussion

If you use the Assessment Tool, we suggest the following process:

1. **Ask each team member to go to the module's landing page and complete the assessment. You should complete the assessment as well.**
2. **Instruct individuals to email their results to you.**
3. **Study the assessment results and look for patterns. Are there learning goals where a majority of team members rated their knowledge/skills as a "5" or a "4"?**
4. **Plan how you might alter the Learning Experience based on the assessment results. You may modify the pacing of or allot more time to the Learning Experience and/or ask team members to review resources before your team meeting.**
5. **Tell your team about any changes to the Agenda when you gather for the Learning Experience.**

### Videos

The Video page in each module contains links to all videos featured in a Learning Experience.

Individuals and teams can watch a module's videos prior to a Learning Experience as a way to preview what the module is about. After a Learning Experience, your team may want to watch the videos again—to reinforce content or as part of an extended conversation about the module's topic. Team members may also want to review the videos on their own or share them with others at your school. (Note: You should use the Multimedia Presentation, not this page, to launch videos during a Learning Experience.) On the Videos page, you and your team can post comments on the videos.

### Resources

Linked from each module's landing page is a list of 4–7 resources from the field, all related to the module's content. The "Next Steps" handout in each Learning Experience suggests how your team might use these resources to further pursue one or more of a module's learning goals. As facilitator, you could also select one or two resources for team members to read before a Learning Experience.

### Feedback

Here, you and your team can comment on the module and exchange thoughts with others who have used and learned from this module. This feature is found on the module's landing page.

## 3 How can I help my team get the most out of a module?

### Set Your Team Up to Take Action

Each Learning Experience gives your team the opportunity to apply what it has learned to your school. As facilitator, your role is to consider the recommended action steps in the context of your school's leadership team structure. Some leadership teams have the authority to take direct action on instructional issues. Others advise those in the school who have this authority. Clarifying what your team can and cannot do before it engages in a module will allow your team to focus on how it can be most effective in improving instruction. To do so, take the following steps:

#### Meet with your principal and/or school leaders

After you review a module's Facilitator Guide and before you engage in the Learning Experience, initiate a conversation with your school's principal and/or other school leaders to discuss:

- How the Learning Experience can deepen or extend your school's instructional goals.
- How your team will apply what it learns to improve instruction at your school. Will the team make decisions or take direct action, or will it make recommendations to other groups/administrators?
- What your team is expected to communicate about the Learning Experience with others at the school and how this communication will occur.
- How the school's leaders will support your team in giving it the time and space to undertake the Learning Experience.

After this meeting (and prior to a Learning Experience), communicate important points from this discussion to your team so that everyone has the same expectations.

#### Engage key stakeholders

After talking to the school leaders, identify others at the school who have expertise or do work related to a module's content. Meet with them to provide information about the module's content and how your team will apply what they have learned. Discuss how you can support each other's work.

### Get the Most Out of the Videos

Each module includes videos that portray real leadership teams working to improve instruction at their schools. Your team will get the most from this central feature of Success at the Core if you follow these suggestions:

#### Use the essential viewing questions

Each video is accompanied by viewing questions. These questions are provided in the VIEW section of the Facilitator Guide and are embedded in the Multimedia Presentation. Highlighting these questions before viewing and discussing them afterward will focus your team's viewing experience.

#### Encourage professionalism while viewing

Six school communities have opened their classrooms and team meetings to filming. Encourage your team to respect those in the videos as if they were colleagues in the room.

#### Extend the use of the video

Learning Experience agendas allocate time for viewing each video once. Your team can replay them during future meetings. Your colleagues can also review the videos on their own. Finally, your team can share the videos with other teams to support ongoing conversations. The Video page in each module contains links to all videos featured in a Learning Experience.

## Use Norms to Support Collaboration

High-performing teams rely on norms to encourage collaboration, improve communication, and define how to work together.

Our Leadership Development materials focus on issues that have a direct impact on learning. Some content may be new to members of your team. Some content may have led to conflict in the past. And some may press your team to collaborate in new and intense ways. Adhering to norms of collaboration will help ensure respectful and fruitful dialogue.

Some basic meeting norms include:

- starting and ending on time
- speaking one person at a time
- hearing all voices
- respecting all points of view
- maintaining confidentiality

Many leadership teams also adopt and adapt the Seven Norms of Collaboration, as developed by Garmston and Wellman (see box). These norms name specific behaviors and communication techniques to help groups focus on a task, listen to one another, and pursue conversations that they might otherwise avoid.

Before you start, devote some time to norm development with your team. Here are some ways to do this:

- Review the Seven Norms of Collaboration and discuss them as a team.
- Use individual and team inventories related to the Seven Norms that you can access at: <http://adaptiveschools.com/inventories>.
- As a team, identify a subset of the Seven Norms on which you particularly want to focus.
- As a team, make a formal commitment to follow agreed-upon norms during team meetings.

During a Learning Experience, you can help keep agreed-upon norms at the forefront by:

- Creating and displaying a poster of your team's norms.
- Reminding your team of your agreed-upon norms as you gather.
- Inviting your team to split into pairs and take one minute at the beginning of your meeting to discuss how to support the norms. At the end of a Learning Experience, individuals can reflect on how they think they did.
- Referring to the norms when a conversation gets tense and inviting your team to identify those that most apply to the situation at hand.
- Reviewing the norms when your team has to make a collaborative decision.

### THE SEVEN NORMS OF COLLABORATIVE WORK

**Pausing:** Pausing before responding or asking a question allows time for thinking and enhances dialogue, discussion, and decision-making.

**Paraphrasing:** Using a paraphrase starter that is comfortable for you—"So..." or "As you are..." or "You're thinking..."—and following the starter with a paraphrase assists members of the group to hear and understand each other as they formulate decisions.

**Probing:** Using gentle open-ended probes or inquiries such as, "Please say more..." or "I'm curious about..." or "I'd like to hear more about..." or "Then, are you saying...?" increases the clarity and precision of the group's thinking.

**Putting ideas on the table:** Ideas are the heart of a meaningful dialogue. Label the intention of your comments. For example, you might say, "Here is one idea..." or "One thought I have is..." or "Here is a possible approach..."

**Paying attention to self and others:** Meaningful dialogue is facilitated when each group member is conscious of self and of others and is aware of not only what she/he is saying, but also how it is said and how others are responding. This includes paying attention to learning style when planning for, facilitating, and participating in group meetings. Responding to others in their own language forms is one manifestation of this norm.

**Presuming positive intentions:** Assuming that others' intentions are positive promotes and facilitates meaningful dialogue and eliminates unintentional put-downs. Using positive intentions in your speech is one manifestation of this norm.

**Pursuing a balance between advocacy and inquiry:** Pursuing and maintaining a balance between advocating a position and inquiring about one's own and others' positions assists the group to become a learning organization.

*Source: Garmston, R., & Wellman, B. (1998). The adaptive school: Developing and facilitating collaborative groups. El Dorado Hills, CA: Authors. (p. 42)*

## 4 Where do I start?

### CHECKLIST to prepare to facilitate a Learning Experience

**Note:** As the facilitator, you do not have to complete all these items yourself. Enlist the help of others on your team!

#### One to Two Weeks in Advance

##### Study the structure and content of Leadership Development modules

- Read *About the Materials* (accessed in the *About Success the Core* section of the website)

##### Review facilitation materials

- Read and print the Facilitator Guide and handouts
- Preview the Multimedia Presentation with the Facilitator Guide in hand to understand the connection between the two

##### Set your team up to take action

- Meet with the principal, school leaders, and other key stakeholders
- Take stock of what work your team needs to do around norms

##### Arrange meeting logistics

- Review technical specifications for running the Multimedia Presentation by visiting the *Frequently Asked Questions* page (accessed from the *Success at the Core* home page)
- Secure a meeting space that has ample room for large and small group interactions and the required technology for the Multimedia Presentation

##### Communicate with your team (Note: You can do this with one e-mail to your whole team)

- Highlight the date, time, and location of the meeting
- Direct your team to the webpage for the module
- Remind your team of its responsibilities related to the module (e.g., to make decisions for the school, to make recommendations to the principal, to communicate with the school community)
- (Optional) Ask individuals to complete the module's assessment (accessed from the module's landing page); save their results as a PDF; and e-mail the results to you by a certain date (be sure to complete the Assessment yourself)

#### Two to Three Days in Advance

- Reread the Facilitator Guide
- Gather necessary materials as outlined in the PREPARE section of the Facilitator Guide
- Rerun the multimedia presentation in your meeting location to test functionality

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