**Detailed Facilitation Notes for Agenda**

**Guiding Coalition Meeting–Getting Started**

**Agenda Item 1: Review Agenda and Introduce Parking Lot and Talking Stick—Facilitation Notes**

* Welcome guiding coalition (GC) members and thank them for joining the work (you may wish to label this a pilot—see discussion in Chapter 3). If the GC is a secondary team, ask members to introduce themselves, including what courses they currently teach.
* Distribute binders for organizing handouts.
* Introduce the Parking Lot poster. Explain that if a discussion point arises that will be likely to take more time than the agenda allows, or an issue comes to mind that is not on the agenda, it will be recorded on a Post-it and put on the Parking Lot. It will then be addressed at the end of the meeting if time allows, or at the next meeting, or dealt with in some fashion between meetings.
* Introduce the Talking Stick and distribute the handout describing its background. Explain that it will not be used for every discussion, but is a useful tool in groups where certain members may dominate while others do not speak up. It is especially useful when the topic is likely to be contentious for the group, because passing it slightly slows down the interchange. The talking stick is passed respectfully from hand to hand and is never tossed or thrown. Sometimes the facilitator may ask for each member to weigh in on some question or issue, and the talking stick is simply passed in order of seating around the circle. While anyone may pass, use of the talking stick encourages those who usually do not speak up to take the floor when it reaches them. Thus, introducing and using talking sticks during teacher collaborations will give teacher leaders another helpful tool.

**Agenda Item 2: PLC Definition—Facilitation Notes**

Ask a GC member to read the definition. Have the group work in elbow partners to “unpack” the definition: What does this mean? What would this look like at our school? Then discuss as a full group.

Key concepts (GC members may wish to use the Notes area on the handout):

1. Professional Learning Community (PLC) refers to the culture of an entire school.
2. The purpose of, and reason for becoming, a PLC is to ensure that all students in the school succeed at the highest levels. When teachers work individually and in isolation, student success is at risk.
3. The work of teachers in a school that is a PLC is driven by the Questions of a PLC.

What a PLC is not:

1. A meeting
2. A team of teachers

Having the GC members understand the PLC term will help prevent misunderstandings as the work commences. Statements like “Our PLC starts at 2:00 on Thursday,” or “Maria and John are in my PLC” illustrate misunderstandings of the term.

Key concepts to share with GC members:

* Each time a team plans a new unit of study, these questions should guide the planning for the specific skills and knowledge of the unit.
* Question 1 refers to the team’s identification of the highest-leverage skills and knowledge for focus in the unit, from the most enduring, high-leverage, and essential skills they have identified in the curriculum for the year.
* Question 2 refers to scaffolding, pre-teaching, and other, individualized support to ensure that English learners, students with disabilities, and any students who are underprepared will be able to succeed.
* Question 3 refers to methods of assessment and criteria for mastery.
* Question 4 refers to the reteaching loop (which may be missing in some classrooms), especially how this will take place within the team, given pacing guides and other time constraints.
* Question 5 is an important planning question, which assumes that some students will have already mastered the knowledge and skills and need to extend their knowledge and/or have enrichment experiences so that their learning time is not wasted.

Planning note for you: If the school’s culture has historically been characterized by most teachers routinely teaching everything whole group, the Questions of a PLC may cause concern. Be prepared with a few “back pocket” responses. Here are some messages that may help assuage early fears:

* When teachers begin to work collaboratively to plan instruction, all the students become the team’s responsibility.
* The collective expertise of every team is superior to individual expertise.
* Collectively planning scaffolding and pre-teaching will benefit the students of everyone in the team.
* Within each team, teachers can potentially regroup students at any time for pre-teaching, reteaching, and enrichment/extension.
* Collaborative planning will begin moving us toward failing fewer students and having all students be successful.
* We are working in stages for our school to become a PLC. This is a process.
* Invite questions and address as many as possible. If there are any questions that cannot be answered immediately, ask the member to write it on a Post-it for the Parking Lot.
* Ask the GC members to consider all this information for a few moments, then hand the Talking Stick to the teacher sitting to either your right or left. Tell the group the Talking Stick will make two passes around the circle. Ask members to try to keep their response to one sentence. For the first round, the prompt is, “If our school was a PLC, it would benefit our students because \_\_\_\_.” The second prompt is, “What we will have to consider moving forward is \_\_\_\_.”

***Other Considerations in Preparation for Agenda Item 2***

Be mindful of your school’s past history of teacher teams. In some schools, teaming is viewed as a way to divvy up the work. In other words, “I’ll plan Unit 1, you plan Unit 2, etc., and as a team we’ll all share.” This is not how teachers collaborate in a PLC because the elements of group thinking and team planning are missing.

Or perhaps some teams may already enjoy sharing favorite activities and materials. While sharing and collegiality are certainly desirable, these alone do not define PLC collaboration. What is missing here is critical discussion about the activities and materials, asking, “What is the *best* lesson sequence and student learning experience/activity to ensure that all students will achieve mastery as we have defined it?” Sometimes, a favorite activity may actually be extraneous to the essential learning the team has defined in Question 1.

While none of the Questions of a PLC directly target *how* individual teachers will instruct the essential learning, the purpose of collaboration is for each teacher to optimize his or her instruction so that all students will be successful. Teachers have individual styles, and working as a PLC does not mean that all the teachers become cookie cutter copies of each other. The intent is that *variability in the* ***essential******curriculum*** *that every student receives* is reduced or eliminated. This is the only reliable way to ensure equity for all students. Further, certain instructional strategies trump others for producing student learning within that essential curriculum, and teachers have a professional responsibility to use those that are most effective. Once students have completed the assessment (see Question 3 of Questions of a PLC), team members then compare results to see what kind of instruction was most successful for the most students and apply those discoveries as they plan the next unit.

In *What Works in Schools: Translating Research into Action,* Robert Marzano (2003) discusses “guaranteed and viable curriculum.” Of the 11 high-impact factors distilled from the meta-analysis of 35 years of studies, having a guaranteed and viable curriculum was found to have the highest-level impact on student achievement. Curriculum is *guaranteed* if every student—regardless of teacher—receives it. It is *viable* if it can be taught to mastery during the instructional time available during the school year. DuFour (2015) provides an extensive discussion about the ostensibly “narrowed” curriculum of the Common Core State Standards (CCSS), including a detailed example (of how it has not been narrowed) from fourth-grade language arts CCSS, taken from *Leaders of Learning: How District, School, and Classroom Leaders Improve Student Achievement* by DuFour and Marzano (2011). In short, the CCSS are still not, by this definition, viable for U.S. schools, so Question 1 entails critical discussions in teams—on an annual basis for preplanning and pacing, and during regular collaboration throughout the year—to prioritize and focus their instruction on the highest-leverage, most enduring and essential skills and knowledge.

In sum, be prepared to return as needed to the Questions of a PLC to clarify or redefine collaboration for GC members, especially if, in the past, teacher collaboration time has had a different focus. If you have chosen the right team members, this agenda item should not present a major stumbling block. However, be prepared to hold additional one-to-one conversations with individual members who may find these concepts troubling.

**Agenda Item 3: School-Wide Roles—Facilitation Notes**

Using the diagram, explain the intents behind a forming a guiding coalition include leadership, communication, and decision making.

* GC meetings will focus on just-in-time leadership discussions related to team meetings that members will be leading in the next few weeks.
* The two-way arrows represent two-way communication. Since GC members represent the entire teaching staff, input may be gathered during GC meetings related to various decisions. Under shared leadership, decisions fall into several categories. Some—mostly operational decisions—will continue to be made by the principal or administrative team. For others, you will ask the GC for input before making the decision. A third category of decisions will be made by the GC and yourself in tandem. Assure GC members that your intent is not to involve them in administrivia. This team’s valuable time will be devoted to issues of curriculum, instruction, and assessment within the context of the Questions of a PLC.
* GC members will be responsible to keep their own team members informed of decisions, solicit input formally from time to time, and lead collaborative team meetings to accomplish specific tasks.
* For now, the principal will facilitate GC meetings. In time, GC members who are interested will begin co-facilitating or take over facilitating.
* The principal will drop in on teacher team collaborations and will be available as needed to work with GC members as they work with their teams in a leadership role.
* Invite discussion about the diagram and what it represents. Have GC members pair up and practice explaining it to each other as preparation for explaining it to their own teams.

**Agenda Item 4: Rotating Meeting Roles/Responsibilities—Facilitation Notes**

Distribute the individual sets of tent cards, reserving one set for use in GC meetings. Have members scan the cards, and explain that the roles/responsibilities should rotate from meeting to meeting, except that the Facilitator role will fall to each of them as they lead their own teams, and for now, to you, the principal, for GC meetings. If teams are small it is not essential that all roles are filled. The Facilitator and Timekeeper roles will be needed for all meetings; Recorder may be needed occasionally, and Spokesperson when teams meet in a full-staff setting. Although there is a Norms Monitor role–which, if used, should rotate from meeting to meeting–it is more effective if all members monitor norms (this will be addressed in Agenda Item 5). The SMARTe planning tent card will be reserved for future meetings, when teams have become familiar with that specific agenda protocol.

Ask for volunteers to be Timekeeper and Recorder for the rest of today’s GC meeting. Distribute additional Engaged Team Member cards to everyone else. Set a time frame for the Timekeeper to use—e.g., every 20 minutes–for reminding the group of how much time remains.

Invite open discussion about the roles and their use during team collaboration.

**Agenda Item 5: Norms (Sample Norms)—Facilitation Notes**

* Share the sample norms (“Team Compact”). Today’s finished product for GC meetings will look something like this.
* Ask members to individually list behaviors that people engage in, which make team meetings unproductive. Ask members to share, while the Recorder charts these on a blank piece of chart paper.
* Next, ask the group to brainstorm a solution (norm) Deanna, why would this word be capitalized in this section? for each problem—e.g., If people are often late, the Norm would read, “Be on time.” Recorder should chart the agreed-upon Norm.
  + Norms should be phrased in positive language (i.e., “Be on time” instead of “Don’t be late.”).
  + Keep list to 5–6 Norms, maximum.
* Ask the Recorder to chart each finalized, agreed-upon Norm on a new sheet of chart paper
* After the list of Norms is complete, each member comes up and signs it, including the principal, signifying agreement to adhere to these Norms during GC meetings.
* Ask GC members to scan the Five Steps to Effective Norms.
* The next step for today is to agree on a signal, or set of signals, for when someone (including the principal) begins to violate a norm.
  + Natomas High School’s Leadership Team (Sacramento, CA) cut out a picture of the face of Norm (from the old TV series Cheers), duplicated it, and mounted the faces on Popsicle sticks. When anyone began to violate a Norm, group members held up Norm’s face.
  + Brookside Elementary’s Instructional Leadership Council (Beaumont, CA) would chant, “Ribbit. Ribbit. Ribbit” when someone began to violate a Norm. The school’s mascot was The Bullfrog.
  + The Algebra I Team at Moreno Valley High School (Moreno Valley, CA) agreed on a different nonverbal signal for each Norm. For example, if someone came in late, the rest of the team would begin tapping their watches or wrists. If sidebars developed, other team members would signal the basketball T (timeout) sign. If someone said something disparaging or disrespectful, the rest of the team would give that member the “shame on you” finger rub.

A common objection to Norm reminders is that they are “dumb” or “childish.” Unfortunately, without reminders, Norms are essentially worthless. Invite team members to simply try out a given reminder or set of reminders for a period of time. Reminders can be changed, but it is essential to have them.

* Today’s GC meeting will be evaluated in Agenda Item 8 regarding how well this team followed its new Norms.

**Agenda Item 6: Professional Work Plan and Team Commitments—Facilitation Notes**

There are always two options for creating the Professional Work Plan

* Option A: Each GC member makes a plan to introduce the elements of today’s meeting (PLC Definition and Questions of a PLC, School-Wide Roles, Rotating Meeting Roles/Responsibilities, and Norms, Parking Lot, Talking Stick) to his or her own team. The team as a whole makes a plan for general actions of team members, as well as actions the principal needs to take to support GC members in their leadership.
* Option B: The team makes a plan to introduce the elements in a whole-staff setting, with teachers sitting by teams with their GC team leaders. GC members will co-present the elements with the principal to the staff then facilitate the practice as the teachers work in teams.

At the end of the full-staff session, the principal will communicate the expectation that all teams will:

* implement the Five Steps to Effective Norms by a specific deadline (previously set by the GC),
* begin using the rotating Meeting Roles/Responsibilities,
* begin using a Parking Lot to keep meetings on track, and
* begin using the Questions of a PLC as a basis for team discussions.

Each team leader will also make a Talking Stick available and will introduce its use as needed whenever, in his or her judgment, it is important to ensure that all voices are heard.

**When the Professional Work Plan is Completed**

* Distribute copies of the planning document.
* Get consensus on which option the group wishes to use for planning.
* Recorder charts agreed-upon actions on the poster size planner; members use their individual copies to record their own notes.
* Recorder fills in today’s date and the date of the next GC meeting at the top.
* Ask the group to describe the focus of the next several weeks’ work with colleagues in a phrase or sentence (e.g., “Understanding what a PLC is” and/or “Introducing new team structures”).
* Recorder charts the agreed-upon focus.

**Option A**

* Ask the group what will be most important for the principal to do during this time period. For example, sending out short bulletins about the various aspects of the work; stating expectations for teams, responding to individual teachers’ questions/concerns, and so on. Recorder charts these.
* Ask the group to brainstorm actions that will be important for all GC members to consistently take during this period (e.g., stay positive about the work with colleagues who may have concerns).
* Allow time for individual members to jot their own notes in one of the Individual Plan spaces then Recorder charts these. At this point, everyone’s individual team plan may be similar or the same, so the Recorder just charts a generic plan in one of the Individual Plan spaces.

**Option B**

* Use the large spaces on page 1 of the planner to list what parts GC members will present for whole-staff practice as they sit by teams.

**Important Note**

If this option is chosen it is *critical* that GC members, not just the principal, assume co-presenter/co-facilitator roles at the staff meeting. The principal can also co-present or co-facilitate and should clarify anything that staff members appear to misunderstand, but the staff needs to observe the symbolic ownership of their team leaders to ensure the best success. If the school is an elementary, probably all the GC members can take a part. At a secondary school, as many GC members as possible should co-present/co-facilitate.

The principal and any other members of the administrative team should serve as process observers as the teams practice each element that is presented. You may wish to inform the staff that you will be taking notes as you rotate among teams so that you can debrief about what you observed as time allows.

For Option B, be sure to agree on a group signal for attention that will be introduced before the first team activity if the staff is not used to working in groups during staff meetings.

Be sure to add Evaluate Norms at the end of the agenda to model this expected action for teams from now on.

* Use the Individual Plan spaces for each member to note what actions he or she will take with individual teams during teacher collaborations in the weeks that follow the staff meeting.

**Other considerations for Option A or B**

Teams will need a focus for discussion as they practice the Questions of a PLC. Ask GC members to identify an upcoming unit of study they and their colleagues will be instructing as a basis for this practice.

The Questions of a PLC can be introduced early in the staff meeting as a frame for ALL of the work then practiced later in the agenda during a team discussion, after the Norms and Norm Reminders have been tentatively agreed on and rotating Meeting Roles and Responsibilities have been introduced and assigned.

**Agenda Item 7: Tool Kit—Facilitation Notes**

* This handout or electronic form is a place for GC members to begin recording the tools introduced in GC meetings, all of which are for use with the teams they lead. If a poster size copy has been made, Recorder can also chart for the group.
* Today’s tools have included:
  + Agenda
    - in advance
    - posted
  + Parking Lot
  + Talking Stick
  + Questions of a PLC
  + Norms/Team Compact
  + Five steps for effective norms
  + Role cards
  + Planning form
  + Group signal
  + Group memory—strategy

Most of these are self-explanatory but several need some clarification.

* Agenda in advance—Point out that you sent the agenda to the group in advance because it is a best practice for all meetings. As they lead their colleagues, sending agendas in advance helps team members come prepared, both with necessary materials and with a mindset for the topics.
* Agenda posted—in addition to a handout—is a strategy to help the meeting stay on track. It gives both the facilitator and the timekeeper a visual referent for redirecting the group if the discussion begins to get bogged down or wanders off topic. If particular topics are likely to create dissention, it is wise to assign time frames to each item on the agenda and note them on the posted copy. It also helps to put the potentially problematic topic near the end of the agenda, if possible.
* Group signal—If Option A was chosen during team planning, this will not be used immediately. Just inform GC members that if/when this team decides to conduct full staff professional learning, a signal will be important to get the full group back together after partner or team discussions.
* Group memory—This simply means to chart the group’s work on important topics, both brainstorming phases, and agreements. It is courteous to give each person in a given meeting individual copies of all the documents used. But having a Recorder publicly chart the work of the group, as you modeled in this meeting for development of Norms, and for the work plan, ensures that what has been agreed on is part of a group record. While some teams resist creating a group memory and prefer having each of the members use own forms to capture discussions, best practice is to publicly record group thinking and agreements, especially in teams that have difficulty with collaboration. These charts can then be brought back in future meetings to review and refocus the work. It is well worth the extra time to have a Recorder do the charting.
* Give members a minute or two to list today’s tools on their electronic or hard copy Tool Kit.

**Agenda Item 8: Evaluate Norms—Facilitation Notes**

* A best practice habit for all teams in the school will be to evaluate their adherence to Norms at the end of each collaboration. GC is no exception.
* Go through each of the newly agreed-upon Norms, and ask GC members to indicate with a “fist to five” (fist indicating zero, five being the highest) how well they felt each Norm was followed. Invite discussion about disagreements in ratings.

If you feel a rating is inflated, call attention to it. You might say something like, “I don’t think I agree that we were a five on number two. I would maybe give us a three, since we had several sidebars today. What do you think?” (pause for response). Then ask, “What would help us in future?” The obvious answer to this question is to use the agreed-upon Norm Reminder.

Ask for group commitment to work on any Norm that was weakly adhered to (e.g., “Do I have everyone’s commitment to work on this one next time?” then wait for nods/comments).

If there were items placed on the Parking Lot, address these as time allows. If time is up, consider whether the item(s) can be handled in some way between now and the next meeting. If not, be sure to place the item on the next meeting agenda.

Be sure to thank GC members for their time and their commitment to this important work for students. Reaffirm your own commitment to supporting them, including being available for one-to-one conversations about concerns that may arise.