

NOTE: *This reflective piece was presented as part of an NSRF-NY Portfolio Roundtable. The complete portfolio included artifacts, referenced by letter, not currently available on line.*

## **National School Reform Faculty (NSRF) New York Facilitator Portfolio**

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### **Introduction**

It was over two years ago that I had my first experience with facilitation as a means to share ideas. I was participating in my first Deputy Superintendents' meeting. Alan Dichter had the Deputies break into triads to address concerns using a Descriptive Consultancy. I found the process to be both frustrating and exhilarating. I wanted to talk. I didn't want to listen. I wanted to interrupt and comment. I didn't want to have to wait to give my input. I did listen. I did wait my turn to give input. I presented my concerns. I received feedback from my colleagues who had listened and waited and responded and shared. I was sold on the process.

When the consultancy was concluded things got even better. Ideas flowed, discussion focused on common issues and solutions. I resented being told we had to conclude and return to the main session. As I did return, I could not help but focus on the potential of what I had just experienced. Here was a means to bring people with common issues and concerns together for effective meaningful dialogue and sharing in a limited amount of time. I had to use this with my principals. They had to experience the process and its potential to use with their staffs.

I spoke later with Alan. He offered to spend two days in July 2001 working with a group of 18 – 20 of our district's educators to experience ways to facilitate our more effectively sharing ideas and concerns (A). Personally, I have benefited from Alan's Executive Leadership Academy and Executive Facilitator's Academy.

At the time of my first Deputies' meeting, I had already divided our district's 40 elementary school principals into eight cohort groups to facilitate their sharing of Best Practices (B). The cohorts met; they visited each other's schools. They observed and shared. What was lacking was a formal structure for their discussion, a way to ensure all participants' ideas were heard, a way to focus the workings of eight independent groups, and a way to monitor their reflections as to what they had observed and what they planned to implement. I needed to create effective team building to facilitate our own professional development in the District.

### **How Does My Work Address Facilitator Standards?**

#### **Building Democratic Community with Voice and Respect for All:**

- Values and uses opening moves
- Provides participants with tools for building community using authentic context

- Is good listener/good questioner
- Creates open environment
- Ensure all voices are heard
- Regularly builds in habit of reflection

Most of my work has involved working with principals within the time constraints of Principals' Conferences. I have been extremely open and public about what my goals for the sessions and feel that our common work and concerns have helped establish a great sense of community. At some sessions we discussed Best Practices and how they were being implemented in our schools (D,F,G,H,I,K,L). At others we discussed how principals provided A.I.S. (K, K-1) or how they used the Grow Report (O) to differentiate instruction. At still others I sought to show principals and assistant principals ways to have productive sessions with their teachers within the time constraints they face in their Professional Development sessions: 50 minute professional development periods, 45 minute common preps or 45 minute conference time.

Agendas for each meeting were centered around specific (common) concerns to be addressed and the specific strategy and/or structure we would use to address these issue(s). Sessions involved structures (eg. Final Word, Descriptive Consultancy, etc) to provide all participants equal chances to participate and be heard in group sessions of four or five participants. All groups then had the opportunity to publicly share out to the larger group and all participants had chances to reflect verbally and/or in writing as to what was accomplished and, more importantly, how their experiences and reflections could be applied directly in their schools (E).

I have recently begun a Leadership Institute to prepare aspiring Assistant Principals for assuming supervisory roles in the District. At the first session I began using "opening moves" for the first time. (I had in the past done limited work with "opening moves" because of time constraints in our sessions.)

I used "Hopes and Fears" to get a feel for exactly what the participants expected from the session (Z, Z-1). I found their responses enlightening. I often referred to them as they related to issues we discussed as the meeting progressed. In fact, as I recorded responses on a chart tablet, I wondered to myself why I had not used "Hopes and Fears" prior to this. I realized that it was a good way to gauge the pulse of the group especially as their issues related to my agenda. I did use the responses to help shape agendas for the next session.

I was particularly pleased with an icebreaker opening move which I used to try to build community among 40 participants in the group. I asked each participant to seek out others in the same job assignment in their schools. They were then to discuss the importance of their position in the school. Groups then shared out and we discussed the interdependencies – however subtle they may have been – which existed between each school constituency. This activity brought together many people with a common focus who had never met each other previously and helped in building community within the group. Doing it with this group inspired me and gave me confidence to want to try such "opening moves" again in future meetings.

I used feedback/evaluation forms from the meeting to assess participants' needs for the next meeting (Z-2). At the next meeting, I shared their own feedback from the first session with them in order for us to revisit our last experience together, let them hear each other's reflections, and see how their reflections led to the content of the current session.

My experience with the Leadership Institute has made me realize I need to engage in more work with community building and setting norms. The "Hope and Fears" activity did give me a chance to get the pulse of the group and their feelings and needs. Having participated in "icebreakers" myself at many training meetings, I greatly enjoyed facilitating the process and seeing strangers come together to share their commonalities among themselves and later to the group.

One practice I would like to incorporate into future principals' meetings (aside from introducing "opening moves") would be to publicly share feedback with participants to let them see what others have valued or not valued in the dialogues. I have on occasion mailed feedback to group members (M). The public, oral review of the feedback would, however, be much more powerful and would serve to help refocus the group on where we've been and where we are going in our sessions.

### **Surfacing and Managing Controversy and Paradox**

- Works with paradoxes and their management
- Is transparent whenever possible to maximize growth of participants
- Has sense of his own authority and uses it carefully
- Negotiates agenda with the group

One paradox I have found myself confronting is that my role as a leader (and rating officer) with expectations for participants' job performance and accountability somehow seemed conflicted with my role as a facilitator. I tried to be transparent from the very beginning to make it clear that my role was to facilitate their work – not to in any way make judgments about their contributions during any discussions. In reality, I wanted to place principals in the same paradoxical situation of being a rating officer and a non-judgmental facilitator. They had to see how they could be transparent and open with their teachers to support their building knowledge and capacity. I stressed that we were working together to seek ways to enhance our abilities to enhance ours and students' learning. I believe I was successful and that principals have actively participated in open, meaningful discussion and sharing. I have been very pleased with the feedback from our sessions (T,U,V,W ).

Perhaps the largest and most uncomfortable controversy I face is the fact that some of my more educationally savvy principals have suggested that their professional development need be on a different level from those who are not as knowledgeable ( AA). In my mind, the question arose as to the value of heterogeneous grouping for our leaders. At this time I still feel we need to intersperse ability levels in our meetings. I, however, believe that while I need to tap the knowledge and resources of the more savvy principals to provide Professional Development to others, I must at the same time give

them opportunities to further their own professional growth. It will be a true challenge to balance their needs with those of the group.

In general, I do feel that I have had very limited experience with controversy in facilitation. I need more experience in really leading a group through a continuous process for extended periods of time, but I do realize that I do not look forward to dealing with controversy especially as it pertains to situations under my authority such as issues of District policy. I do believe it would be a totally different experience to be a neutral facilitator dealing with controversy in which I did not have to feel defensive about my position on an issue but rather could hopefully lead others through their issues of conflict.

### **Developing a Facilitator Tool Box**

- Uses and creates varied and appropriate structure and protocols – stresses application for professional development and routine business
- Emphasizes giving and getting descriptive feedback
- Designs agendas with input
- Begins to use protocols to look at student and professionals' work

During the summer of 2001, I began team building in my professional development sessions. I used protocols (such as Success Analysis and Descriptive Consultancy) as a method for reflective discussion based upon readings done in *Best Practices, New Standards for Teaching and Learning in America's Schools* by Zeleman, Daniels and Hyde (C,D,F,G,H,I). I was extremely pleased with the responses of the groups to each day's activities. While I was often concerned that I hadn't planned enough, I always had to stop group interaction to facilitate their sharing to the larger group.

At the conclusion of each session, groups shared out and we reflected on *Best Practices* as they were implemented in various schools in the district. The principals were given feedback sheets asking for reflections on what they learned, what they could implement and their opinion of the protocol (E).

I feel I have been particularly active in engaging principals, assistant principals and teachers the use of structures and strategies and their application to professional development and looking at student work. This includes looking at the fitting of specific types of protocols (eg. Collaborative Assessment Conference and Tuning Protocol) to the needs of the topics(s) to be addressed at Professional Development.

As I had briefly mentioned previously, because of time constraints during our meetings, I have done limited work with "opening moves". What I have done is to notify participants in advance what the goals of each session will be and what they should be aware of before a meeting. They may, for example, need to read an article or familiarize themselves with a protocol (A,C,D,F,G,H,K,L,N). I have sometimes asked specific participants to be facilitators at group sessions and have sent them the agenda and structure of the discussion in advance of the meeting.

When we were initially made aware of the new teachers' contract, we learned that elementary school principals would be responsible for providing two 50 minute

professional development periods each week. The problem was that the Professional Development began at 8:00 and because of the responsibility for opening the school each morning, principals felt the need to leave the Professional Development sessions long before the 8:50 conclusion. Principals needed strategies to provide effective Professional Development sessions with sustainable results. I believed protocols with follow-up agendas based upon participants' reflection and feedback to be one possible solution to their needs. These could provide a means to effectively address successes or concerns in the 50 minute time frame and to – based on reflection and feedback from participants to the administration – provide both a focus for the next session's agenda and expectations of what new practices the principals might look for in classrooms based on the discoveries in the protocols.

I scheduled a series of summer principals' meetings (P,Q,R,S) during which we modeled protocols and discussed how each could be applied to sustaining each principal's professional development plan for September. A packet of materials including a description of each protocol (P) was sent to each principal along with a schedule of our meetings (Q). At each session we "fishbowed" one protocol (Success Analysis, Collaborative Assessment Conference, Descriptive Consultancy, and Final Word). Principals then had interactive reflective discussion as to how they could model the protocols and apply them in the 50 minute Professional Development sessions in their schools. They also discussed the ways protocols could be used to sustain the continuity of focus of the Professional Development. Principals were given reflection/evaluation forms at the end of each session (V,W). Before I initiated these sessions I had principals meet in small groups to use a Tuning Protocol to share each other's Professional Development Plans. Feedback/reflection sheets were also given out after those sessions (T,U).

As happy as I was with these experiences, my personal reflection leads me to believe I have much left undone. I feel remiss in what I perceive is a lack of follow-up on my part. I had felt that I was providing tools for my principals to work together and to work with their teachers. After "fishbowling" a practice and reflecting on its implications, I probably should have asked a principal to experience facilitating for the group. I never formally requested feedback as to what strategies they had actually adopted and how the strategies were used in their schools. I certainly never asked what strategies they chose not to use and why they made that decision. My feeling was that I could expose people to my methods, but I should not demand that they adopt them. I do know that some principals incorporated protocols into their September Professional Development (Y) but I feel I should have asked specifically what strategies other principals had or had not used and why. This could have led to my working directly with them or with their teachers to facilitate professional growth and sharing in their schools.

As I stated previously, I also realize now from my experience with my Leadership Academy that I should provide more opportunities for "opening moves" to gauge a group's current needs and expectations as I convene sessions in the future. When I met with principals this summer to investigate sustainable Professional Development, I easily could (should) have asked their input about their needs and concerns before we looked at structures to address what I had perceived their needs to have been.

### **Using Authentic Public Learning for Equitable Outcomes**

- Has equity as an explicit learning goal
- Shifts responsibility for participation and learning to the group
- Routinely links adult to student learning
- Engages group in reflections regarding practice

I feel that to provide equity I must provide a format where all participants are able to contribute equally in the process. Everyone should have an equal voice and have equal accountability to the group. The scripting of protocols allows for this equal participation. I feel, however, that not everyone feels comfortable with the structure of a protocol. Reluctant participants can be eased into the process with a Success Analysis Protocol, which allows them to talk about what they feel they do well. It is often through discussing successes and feeling comfortable with the open and non-judgemental aspects of the process that participants can feel comfortable discussing problems in a structure like Descriptive Consultancy or even a Tuning Protocol.

In introducing and or modeling scripted sessions, I have, as noted previously, either fishbowed the process or asked a group member in advance of the session to facilitate the process. In either situation, my goal was to make members of the group responsible through participating in such a way that they could experience the process and appreciate its potential use and application in their school settings.

With this belief in mind, I have on several occasions recruited teachers to model Collaborative Assessment Conferences for principals and assistant principals – each time I was seeking to simultaneously provide a structure for looking at student work and provide a means for discussion of implications for instruction and reflection as to how the practices can be implemented in their schools ( AA ). I was pleased with these sessions. I do feel, however, that I have not been active enough in following up to ascertain how they have translated into practice in our schools.

While I am obviously a proponent of structured interactions among group members, I believe that the discussion following the scripted protocol has the potential to be as valuable as the session itself. The follow-up gives participants an opportunity to reflect on and discuss key issues and strategies which emerged during the protocol formalized interaction. It is then that solutions can be discussed and evaluated. It is also then that participants get a chance to reflect personally as to how ideas apply to their unique situations. I have tried to build this time for discussion/reflection into all of my meetings.

### **Where Do I Go From Here?**

Writing this narrative has enlightened me as to how limited my experiences have been. I have worked solely with groups of District educators in supporting their professional development. I realize that I could “work smarter” with them if I were to make them accountable and ask more feedback as to how they have applied ideas which

arise in our meetings. I should share those experiences along with reflection pieces at beginning of monthly meetings.

I also realize that I need to take risks in trying new things. My initial trial with “Hope & Fears” and my icebreaker did work and did boost my confidence and encourage me to try other things which I have experienced but not practiced in my meetings. For example, I have yet to ask participants in a meeting to turn to talk to their neighbors about issues or experiences. I have enjoyed and valued doing this in my training but I have not yet tried it when I lead groups.

Because I am ultimately the rating officer for all people with whom I’ve worked, I often feel like a one-man-band lacking anyone with whom to objectively reflect on improving my practices and taking more risks in my presentations. I do, however, feel that I am on the right track in modeling with educators a means to facilitate the conversations which are essential to all of our professional growth, improved delivery of instruction, and looking at student work in a meaningful way.