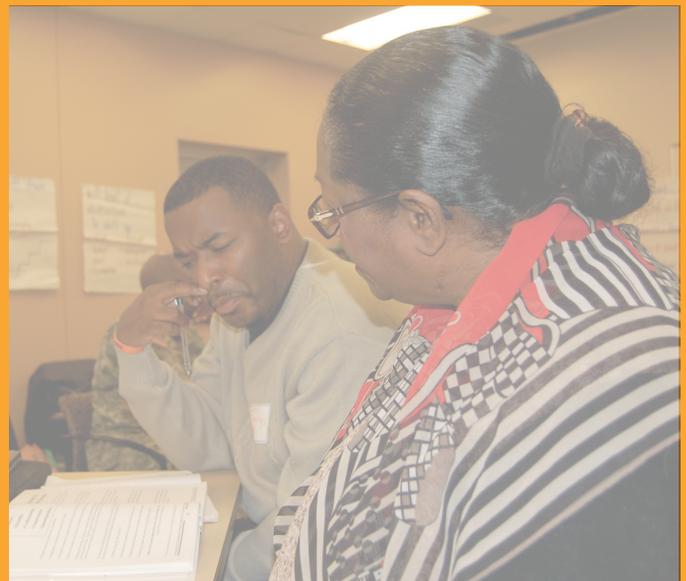


**SCHOOL-BASED
PROFESSIONAL
LEARNING
FOR IMPLEMENTING
THE COMMON CORE**

**Unit 2:
Facilitating
Learning
Teams**





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Learning Forward's Transforming Professional Learning to Prepare College- and Career-Ready Students: Implementing the Common Core is a multidimensional initiative focused on developing a comprehensive system of professional learning that spans the distance from the statehouse to the classroom. The project will reform policy and practice and apply innovative technology solutions to support and enhance professional learning. With an immediate focus on implementing Common Core State Standards and new assessments, the initiative provides resources and tools to assist states, districts, and schools in providing professional learning for current and future education reforms.

This work is supported by Sandler Foundation, the Bill & Melinda Gates Foundation, and MetLife Foundation. Learn more at www.learningforward.org/publications/implementing-common-core



Facilitating **Learning Teams**

Facilitating learning teams

This unit focuses on the structures and supports teams need in order to accomplish their goals. By learning more about the stages of team development and team roles, members can contribute more meaningfully to the team's success. Willing participants can gain facilitation skills to support the team's work.

This unit is particularly beneficial for those who facilitate learning teams — grade-level or department chairs, other teacher leaders, school leadership teams, or district or school leaders. Team members who share responsibility for a team's effectiveness and success also will find this unit can help to strengthen the team's collaboration skills and productivity.

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Learning objectives

Learners will be able to ...

1. Understand the responsibilities and skills needed by facilitators and other roles that contribute to a team's success.
2. Understand how teams develop in order to be able to address members' needs at each stage of team development.
3. Acquire skills and strategies for facilitating learning teams, such as forming agreements, using purpose and nonpurpose, managing challenging situations, and assessing team effectiveness and efficiency.
4. Develop strategies for assessing learning team members' contributions, the team's effectiveness, and the results of the team's work.

Overview

Learning teams need structure and support to be effective. Too often educators come together in collaborative learning teams with good will and intentions, yet without adequate preparation and with little understanding about how to use their time to achieve the greatest gains for themselves or their students. This module focuses on what learning team facilitators need to know and be able to do to in order to coordinate the efforts of diverse individuals who gather to engage in collaborative learning, reflect on their practice and their students' learning, and strengthen their individual and collective expertise.

The facilitator plays a key role in successful teams. The facilitator's job is to make the team's work easier. Drawn from the Latin word *facil*, *facilitator* refers to the person or people who serve as the process and task leader within a team.

The role is important to ensure team members spend their time well, the intended work is accomplished efficiently and effectively; all members actively participate, team members show one another respect, and individual and collective trust and safety develop. Without any one of these elements, the team's success is likely to be diminished and members will not value being part of the team.

Sometimes a department head, team leader, or grade-level chair serves as the facilitator. In some schools, coaches or other resource staff facilitate learning teams. In others, principals and assistant principals serve as facilitators. Regardless of who serves as facilitator, any educator can learn the skills that facilitators need.

Team members can rotate the facilitator's role if all members have facilitation skills. All team members should know and understand the facilitator's role to best appreciate how the facilitator contributes to the team's success and prepare for rotating the role among all members. In the most successful collaborative learning teams, all members share responsibility for the team's success. However, until members are working well as a team and achieve some successes, it is best for a single facilitator to coordinate the team's learning and work.

The facilitator should have a basic understanding of his or her responsibilities and how to establish structures and processes to ensure the team accomplishes its goals. The facilitator works with team members to establish the overall goal for the team's collaboration, the objectives, purpose, and deliverables for each meeting, the agenda, and processes.

When educators read the list of a facilitator's responsibilities, they often shy away from the responsibility and opt for other roles on the team with less to do. These roles include timekeeper, resource manager, recorder, process observer, and summarizer. Every team is not large enough for one person to be assigned to each of those roles, and not all roles are essential to the team's success. Once team members move through the initiation phase, they will have a better understanding of what roles they

need. Sharing roles among team members is important so that no one member is directing the team's learning and collaborative work. When one member consistently takes the lead, the team ceases to be a team and other members withdraw.

Presenting versus facilitating

A presenter or trainer is responsible for teaching. A presenter or trainer develops knowledge and skills that learners will apply in their practices. Facilitators, on the other hand, create the conditions and supportive environments in which people are comfortable collaborating. They manage time, people, and resources, and support interpersonal relationships to help individuals and the team achieve their goals.

Background reading

Killion, J. & Roy, P. (2009). Facilitating collaborative professional learning. In *Becoming a Learning School* (pp. 127-134). Oxford, OH: NSDC.

[Tools 12.1, 12.2, 12.3, 12.4, 12.5, 12.6](#) from *Becoming a Learning School*:

Killion, J. & Roy, P. (2009). Evaluating collaborative professional learning. In *Becoming a Learning School* (pp. 141-147). Oxford, OH: NSDC.

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Killion, J. & Roy, P. (2009). Team agreement template. In *Becoming a learning school*. Oxford, OH: NSDC.

NSDC. (2005, November/December). Which stage is your team in? *Tools for Schools*, 9(2), 5-7.

Richardson, J. (1999, December/January). Conflict resolution: Common goals override individual interests. *Tools for Schools*, 2(3), 1-8.

Richardson, J. (2005, November/December). Transform your group into a team. *Tools for Schools*, 9(2), 1-3.

Facilitator's agenda

TIME: 3 1/4 hours

SECTION	TIME	TOPIC	PURPOSE	STRATEGIES	MATERIALS
1	15 min.	Overview, introductions, agenda, objectives, purpose, and working agreements	Build connections to the learning content and establish a comfortable environment Introduce participants Create a common set of agreements	<ul style="list-style-type: none"> • Present objectives, agenda, working agreements • Seek consensus on agreements • Engage participants in learning 	<ul style="list-style-type: none"> • Handout 1.1 (Slide 2) • Handout 1.2 (Slide 3) • Handout 1.3 (Slide 4) • Handout 1.4 (Slide 5) • Handout 1.5 (Slide 6)
2	10 min.	Conditions for a successful collaborative learning team	Clarify the conditions that lead to a learning team's success	<ul style="list-style-type: none"> • Review the conditions for an effective team • Engage participants in a mini-dialogue about the presence of conditions (Slide 8) 	<ul style="list-style-type: none"> • Handout 2.1 (Slide 7) • Slide 8
3	40 min.	Define facilitator, facilitator responsibilities and attributes, and other roles	Define facilitator Describe facilitator responsibilities Discover attributes of facilitators Discuss other roles in a team	<ul style="list-style-type: none"> • Present definition and responsibilities • Conduct team investigation of attributes • Conduct jigsaw on roles • Complete learning task 1 (Slide 12) or learning task 2 (Slide 13) 	<ul style="list-style-type: none"> • Handout 3.1 (Slide 9) • Handout 3.2 (Slide 10) • Handout 3.3 (Slide 11) • Slide 12 or 13 • Chart paper, markers, tape



SECTION	TIME	TOPIC	PURPOSE	STRATEGIES	MATERIALS
4	30 min.	Stages of team development and how facilitators help the team develop at each stage	Understand how teams develop over time	<ul style="list-style-type: none"> • Present the stages of team development and facilitator actions • Facilitate team task • Complete learning task (Slide 18) 	<ul style="list-style-type: none"> • Handout 4.1 (Slides 14-17) • Slide 18
5	20 min.	Agreements	<p>Establish agreements among team members to develop a culture that promotes learning, experimentation, and risk taking by ensuring safety, trust, and respect for each member</p> <p>Review a process for establishing agreements</p>	<ul style="list-style-type: none"> • Define agreements and explain how they support team members' success • Facilitate team task • Share process for developing team agreements • Complete learning task (Slide 23) 	<ul style="list-style-type: none"> • Handout 5.1 (Slide 19) • Handout 5.2 (Slide 20) • Handout 5.3 (Slide 21) • Handout 5.4 (Slide 22) • Slide 23
6	20 min.	Purpose and nonpurpose	Focus the meeting to increase accountability for achieving goals	<ul style="list-style-type: none"> • Read definition and samples • Write several examples for upcoming meetings they may attend or facilitate • Complete learning task (Slide 26) 	<ul style="list-style-type: none"> • Handout 6.1 (Slides 24-25) • Slide 26



SECTION	TIME	TOPIC	PURPOSE	STRATEGIES	MATERIALS
7	30 min.	Strategies for addressing challenges in teams	Acquire strategies for addressing issues and challenges that occur	<ul style="list-style-type: none"> Describe types of challenges or issues that are likely to occur Identify mandatory and optional facilitator strategies to address them Complete learning task (Slide 30) 	<ul style="list-style-type: none"> Slides 27-28 Handout 7.1 (Slide 29) Slide 30
8	20 min.	Assessing teamwork and members' contributions for improvement	Identifying tools and processes for assessing strengths and areas for improvement in team's work and individual members' contributions	<ul style="list-style-type: none"> Share areas for assessment Investigate sample tools Complete learning task (Slide 32) 	<ul style="list-style-type: none"> Slide 31 Handout 8.1 Handout 8.2 Handout 8.3 Handout 8.4 Handout 8.5 Handout 8.6 Handout 8.7 Slide 32
9	5 min.	Wrap-up	Summarize learning and plan next actions	<ul style="list-style-type: none"> Facilitate team task Return to essential questions, and answer questions with rotating partners 	<ul style="list-style-type: none"> Slide 33 (Handout 1.3)

Participant Packet



Unit 2: Facilitating Learning Teams



Learning objectives

Learners will be able to ...

1. Understand the responsibilities and skills needed by facilitators and other roles that contribute to a team's success.
2. Understand how teams develop in order to be able to address members' needs at each stage of team development.
3. Acquire skills and strategies for facilitating learning teams, such as forming agreements, using purpose and nonpurpose, managing challenging situations, and assessing team effectiveness and efficiency.
4. Develop strategies for assessing learning team members' contributions, the team's effectiveness, and the results of the team's work.

Agenda

Time: 3 1/4 hours

SECTION	TIME	TOPIC	PURPOSE
1	15 min.	Overview, introductions, agenda, objectives, purpose, and working agreements	Build connections to the learning content and establish a comfortable environment Introduce participants Create a common set of agreements
2	10 min.	Conditions for a successful collaborative learning team	Clarify the conditions that lead to a learning team's success
3	40 min.	Define facilitator, facilitator responsibilities and attributes, and other roles	Define facilitator Describe facilitator responsibilities Discover attributes of facilitators Discuss other roles in a team
4	30 min.	Stages of team development and how facilitators help the team develop at each stage	Understand how teams develop over time
5	20 min.	Agreements	Establish agreements among team members to develop a culture that promotes learning, experimentation, and risk taking by ensuring safety, trust, and respect for each member Review a process for establishing agreements
6	20 min.	Purpose and nonpurpose	Focus the meeting to increase accountability for achieving goals
7	30 min.	Strategies for addressing challenges in teams	Acquire strategies for addressing issues and challenges that occur
8	20 min.	Assessing teamwork and members' contributions for improvement	Identifying tools and processes for assessing strengths and areas for improvement in team's work and individual members' contributions
9	5 min.	Wrap-up	Summarize learning and plan next actions



Essential questions

What conditions contribute to a team's success?
What is facilitation?
What are the facilitator's responsibilities?
What attributes do successful facilitators demonstrate?
Why is facilitation important to a learning team, professional learning community, community of practice, or other teams?
How do the phases of team development relate to your work?
How do facilitators help teams build trust and respect for one another?
What agreements do I use with different teams?
What other roles contribute to a team's success?
How do facilitators manage challenging situations?
How do purposes and nonpurposes help increase a team's effectiveness and efficiency?



Agreements

- Be open to learning new strategies.
- Be an active participant.
- Take responsibility for your learning.
- Honor your colleagues' learning needs.
- Respect our time schedule.
- Think of how you might use these resources to develop others' capacity to facilitate.



Team characteristics

Recall your experiences as members of effective and ineffective teams.

Record the characteristics of each kind of team.

CHARACTERISTICS OF INEFFECTIVE TEAMS	CHARACTERISTICS OF EFFECTIVE TEAMS
GENERATE HYPOTHESES ABOUT WHAT CONTRIBUTES TO THE DIFFERENCES.	

Conditions for an effective team

CONDITION	CONTRIBUTION
Clear roles and responsibilities	
Norms for interaction	
A shared vision and mission	
A clear purpose	
Defined processes for accomplishing goals	
A clear decision-making process	



Definition of facilitator

A facilitator helps the team free itself from internal obstacles or difficulties so members may more efficiently and effectively accomplish their goals.

A facilitator guides the team's work without directing it, helps the team discover ways to address challenges and maintains safety and trust within among members.

A facilitator brings structures and processes to help the team accomplish its goals.

A facilitator appreciates and values what each person contributes.

A facilitator's responsibilities

The facilitator is responsible for:

- **Establishing** agreements among members to guide their interactions, learning, and work.
- **Helping** the team use data to establish learning goals for the team and members' students.
- **Recommending** procedures and strategies for accomplishing goals.
- **Refocusing** members when necessary.
- **Engaging** every member fully.
- **Listening** deeply to all members to understand their perspectives, values, and needs.
- **Supporting** individuals and the team to maintain safety and trust.
- **Maintaining** a safe environment for honest interaction.
- **Addressing** assumptions and challenges that threaten the team's ability to reach its goals.
- **Checking** perceptions.
- **Modeling** effective communication skills.
- **Remaining neutral** when that stance is appropriate for the type of team and its goals.
- **Guiding** ongoing evaluation of the team's effectiveness and results.



What do facilitators need to know and be able to do to fulfill their responsibilities?

What attitudes or beliefs must they hold?

KNOWLEDGE	SKILLS	ATTITUDES/BELIEFS
What must facilitators know?	What must facilitators be able to do?	What must facilitators believe or value?

Team roles

Purpose: To develop understanding of the roles and responsibilities of roles that contribute to a team's success

Time: 15 minutes

Materials: Handout 3.3

Steps:

1. Divide into teams of six.
2. Seek a volunteer to serve as facilitator.
3. Assign one role to each team member except the facilitator.
4. Ask each person to read and report on his or her role. The report should include a description of the role, its responsibilities, how the role contributes to the team's success, and current practices related to the roles in participants' schools or districts.
5. Have one person select a role from the list, read the description, and share it with the entire team. Be sure to share not only what a person in this role does, but also why this role helps a team be effective and efficient.

Timekeeper

The timekeeper helps the team stay aware of how it is using time, how much time is assigned to each task, and how much time the team is using to accomplish a specific task. The timekeeper gives advance notice when a time limit is near and helps the team renegotiate time if the task is incomplete and needs further attention. If members agree to give a task more time, the timekeeper helps them adjust time to accomplish the balance of the team's agenda.

Resource manager

The resource manager helps the team have whatever materials, supplies, or other resources it might need to accomplish its goals. The resource manager makes sure the team has these items close by so members don't waste time collecting or finding them during the meeting.



For example, the resource manager might make sure the meeting room has enough outlets for everyone to plug in a computer if needed or that copies are available of the student texts or curriculum the team plans to use. The resource manager might also bring other texts, journals, books, and so on that are related to the focus on the learning. The resource manager also coordinates with all team members to bring resources to the meeting so everything they need is easily accessible.

Recorder

The recorder works with team members to capture big ideas, next actions, topics discussed, information to share outside the team, and so on. The recorder completes the summary log about the meeting and shares it with the principal or posts it on the team's community site. The recorder captures who is responsible for certain tasks prior to the next meeting, the recommended focus for the next meeting, and the resources needed so everyone has a record to review. The recorder works with the summarizer to capture a brief statement of summary about the meeting. Teams sometimes use forms to record their meeting notes.

Process observer

The process observer provides feedback to team members individually and collectively on the team's operations, particularly on how well the team adhered to its agreements and where it veered from them. When teams are new, the process observer might note only strengths. As teams mature, the process observer might note strengths and areas for improvement. The process observer also might engage members in a discussion of their individual and collective behaviors rather than being the person to provide the feedback.

Summarizer

The summarizer helps team members transition from one part of the agenda to the next by summarizing what just occurred. This summary is useful for the recorder and builds in natural transitions within the team's work. Summarizers capture the big ideas, check with the recorder to make sure the ideas are recorded, and help team members stay focused on their work and learning. When a summarizer is not designated within a team, the recorder can serve as the summarizer or the role can rotate among members within a single meeting.

Stages of team development

STAGES	CHARACTERISTICS	FACILITATOR ACTIONS

Team agreements

Purpose: To understand what agreements are, how they contribute to a team's success, and how to develop them

Time: 20 minutes

Materials: Handouts 5.1-5.3

Steps:

1. Read the sample agreements in Handout 5.3.
2. Label each agreement in one set of agreements by the type of agreement.
3. Consider which areas are not addressed and recommend agreements for those areas for this type of team.

Sometimes called norms, agreements are the explicit promises team members make to one another about how they operate as a team. Agreements describe how team members will interact and what they want from each other to maintain safety, trust, and respect, as well as to be effective and efficient in accomplishing their work.

All teams have agreements. Some are explicit, and others are implicit. The more explicit the agreements, the more likely it is that members will honor the agreements and avoid disappointment or conflict when agreements are not kept. Agreements can change when members commit to change them and make the change explicit.

Agreements are valuable only if team members adhere to them, review them periodically, and offer ongoing feedback about how the group is maintaining them. In the early stages of development, team members should review their agreements at every meeting and provide self- or team-focused feedback on how well the team adhered to the agreements at each meeting. Over time, as the team matures, members may pay less explicit attention to the agreements; however, the topic should never completely disappear from the team's agenda. Periodically reviewing the agreements along with assessing the team's efficiency and effectiveness contributes to continuous team improvement.

Areas for agreements

Decision making	How will we make decisions?
Problem solving	What is our process for solving problems?
Disagreement/conflict	How will we disagree with one another?
Confidentiality	What topics/comments/information need to be kept confidential?
Interaction/support	How will we support one another in this team? How will psychological safety, individuality, individual needs, creativity, growth, and change be supported?
Communication and participation	How will we communicate with one another? Is it OK to be silent?
Time and attendance	Will we start and end on time? How will absences be handled?
Productivity	What expectations do we have for one another related to the pace of the work, and what do we want to accomplish as a team?
To identify agreements, ask: What do I need in order to . . .	Feel safe?
	Take risks?
	Be an effective team member?

Sample agreements

Every team establishes its own agreements. The team's purpose and its stage of development influence those agreements. Some samples are:

Collaborative learning teams

- Be prepared and on time to each meeting.
- Engage fully.
- Have student success as the primary driver of the team's work.
- Be open to new ways of thinking and acting.
- Seek to understand one another's views and values.
- Listen to others fully.
- Respect diverse ideas.
- Make constructive contributions.
- Speak honestly.
- Maintain a positive orientation.

School improvement teams

- Be honest and share what you think and feel.
- Participate in the conversation. It is your responsibility to get your voice in the room.
- Commit to getting a representative view.
- Think creatively and comprehensively.
- Treat each other as equals.
- Listen and hear one another's viewpoints. A person's perspective is that person's truth.
- Provide equal airtime for all participants.
- Publicly support all decisions made in the team.



Data-driven decision making teams

- Focus on what the data tell us.
- Ask the hard questions about the data's meaning.
- Focus on what to do in the future.
- Refrain from blaming or finding fault.
- Use data to drive the team's decisions.
- Think creatively and comprehensively.
- Listen rather than prepare your response when others speak.

Teams in conflict

- Listen and hear one another's viewpoints; a person's perspective is his/her truth.
- Say what you need to say in the room, not in the parking lot. If you do not say it here, don't say it at all.
- Take responsibility for putting your ideas into the room.
- Maintain equal airtime.
- Address issues, not personalities.
- Speak directly to the person with whom you have an issue.



Developing agreements for **long-term teams**

These steps help teams that will stay together for longer periods of time to develop a set of agreements that will improve the team's functioning.

1. Identify and share individual needs.
2. Clarify what abstract agreements look like and sound like.
3. Ask for missing agreements. Recommend some or prompt others to do so.
4. Ask for the total team to agree.
5. Work toward consensus with the agreements.
6. Commit to giving each other feedback on adherence to agreements.
7. Have all members pledge to follow the agreements.
8. Post the agreements and review them frequently.

Definitions of purpose and nonpurpose

Purpose: A description of the meeting's focus, the objective the team intends to accomplish, and description of how the work relates to the team's overarching goal. The meeting purpose keeps team members focused on what they are expected to do and accomplish by the end of the meeting.

Nonpurpose: Describes what the team might be tempted to do because the focus is related, but this focus is likely to take members off track.

EXAMPLE

This series of meetings might take place over two weeks. Each meeting has an interim objective that contributes to the overarching goal and has a purpose and nonpurpose.

Overarching goal: To increase student achievement in mathematics by 10% on the annual assessment.

Student learning target: To increase student achievement in mathematics problem solving by 20% on the next benchmark assessment by developing students' ability to use three different problem-solving strategies to solve problems, independently select which strategy to use for what type of problems, apply the strategies independently and successfully to increasingly complex problems, and explain their rationale for selecting which problem-solving process to use.

Teacher learning target: To understand and teach multiple problem-solving strategies so students meet their learning target by describing and using multiple problem-solving strategies; selecting developmentally appropriate problem-solving strategies for students to use that align with grade-level specific math curriculum standards; designing instructional lessons on using each of the selected strategies and on selecting which problem-solving method to use given a variety of math problems; designing increasingly complex problems that require different problem-solving strategies; and learning strategies to promote students' explanation of their thinking about their choice and use of different problem-solving strategies.



MEETING	PURPOSE	NONPURPOSE
1	Develop an understanding of multiple approaches to problem solving by studying professional literature and other sources that explain different approaches to problem solving; apply the problem-solving approaches to solve grade-level specific problems to determine whether the strategies are developmentally appropriate or effective for the types of problems students are expected to solve; identify what individual members are learning about different strategies for problem solving.	Determine how to teach the strategies to students.
2	Confirm which problem-solving strategies all team members will teach and design a common assessment that will assess students' mastery of each problem-solving approach; identify what individual members are learning about different strategies for problem solving.	Develop instructional lessons on the problem-solving strategies.
3	Develop instructional lessons with appropriate differentiation to address students' learning needs for teaching each of the problem-solving strategies and multiple performance tasks for each approach; identify what individual members are learning about teaching different strategies for problem solving.	Discuss whether other grade levels are teaching similar strategies.
4	Establish a timeline for teaching the lessons; design an assessment to determine whether students can select the best problem-solving strategy for a particular problem and explain their rationale for selecting a strategy; identify what individual members are learning about different strategies for problem solving.	Discuss imminent parent conferences, a field trip, or schoolwide professional learning on science.



MEETING	PURPOSE	NONPURPOSE
5	Design instructional lessons focused on teaching students how to select problem-solving strategies, explain a rationale for choosing a strategy and assessing its effectiveness in solving a problem, and apply their learning to increasingly more complex problems; set a time schedule for administering the benchmark assessment; commit to bringing student work samples from classroom assessments to the next meeting; identify what individual members are learning about how students are learning to apply different strategies for problem solving.	Discuss the shortcomings of the math textbook in accomplishing this outcome.
6	Share results of classroom assessments on selecting appropriate problem-solving strategies; identify students who need additional instruction and practice; develop classroom interventions for these students and enrichment/extension tasks for students who demonstrated mastery; commit to using the interventions and bring samples of student work to the next meeting for students who continue to need support to achieve the learning target; identify what individual members are learning about how to differentiate instruction for students who need additional support for applying different strategies for problem solving.	Discuss who is responsible for poor student achievement.
7	Examine the work of underperforming students to determine how to address their learning needs; identify additional interventions to support and extend student learning; plan for regrouping students for two days to provide intensive instruction and appropriate extension prior to the benchmark assessment.	Explain why some students cannot be successful with this learning target.
8	Review student performance on the benchmark assessment; analyze how teachers' understanding and skills contributed to student performance; assess team members' achievement of their learning target; assess students' achievement of their learning target; identify the next learning focus for teachers and students; assess the team's overall effectiveness and efficiency to identify ways to improve their collective work.	Criticize individual team members; criticize the curriculum.

Addressing challenges

Every team has challenges. Disagreement and conflict are natural parts of team development.

Many teams disband at the first sign of disagreement or conflict because members lack constructive strategies to handle naturally occurring challenges.

To reach advanced levels of productivity and development, teams will and must experience challenges. Skillful facilitators guide team members through the challenges. Some challenges that occur in teams are:

- Conflict between or among members.
- Different values.
- Unproductive behaviors, such as interrupting, dominating, and so on.
- Uneven engagement.

How teams approach challenges determines whether a team will continue to grow and develop or whether it will dissolve. All members, and particularly facilitators, need to be comfortable with strategies to maintain a constructive climate for the team to work through challenges.



Facilitation strategies

Facilitators may combine these strategies.

In every situation, always:

- **Remain neutral.**
- **Listen carefully** to what is said by the person or people presenting the challenge.
- **Seek to understand** the source of the challenge.
- **Honor the situation;** acknowledge that the situation is uncomfortable for everyone.

In many cases, because facilitators are as uncomfortable with challenges as team members, they attempt to ignore the challenge, squelch the issue, or take care of the challenge themselves.

Facilitators are encouraged to be cautious and take only small steps in order to allow the team to handle its own challenges. Of course, the facilitator should actively intervene if any member's personal safety is at risk.

Additional options:

- **Describe the challenge in neutral terms.**
 - “I am observing that members are interrupting one another.”
- **Wait and allow team members to address the situation** themselves. This may be difficult when team members are uncomfortable; however, when they learn to address the challenges themselves, they depend less on the facilitator and become a stronger team.
- **Invite all members to jointly address the situation.**
 - “I wonder what we can all do to eliminate the interrupting.”

- **Speak privately to individuals** and offer objective observations about their behaviors and the impact on other team members.
 - “I notice that you have not contributed in the last few meetings. I wonder if you can help me understand that and what I might do to support you.”
 - “I have observed a pattern. When Jacqueline speaks, you initiate a side conversation. I'd like to understand this and explore options for giving all team members your full attention when they speak.”
- **Find common ground,** perhaps by revisiting the learning targets, purpose, etc.
 - “We may disagree about how to assess students so that they are all successful; however, we agree that we do want every single student to meet the standard. Keeping our goal in mind, I'd like to explore how we might find common ground on the design of the assessment.”
- **Focus on the issue rather than individuals.**
 - “What is most important here is that some students are not achieving at the same level as others.”
- **Pause the meeting** and invite participants to revisit the team's agreements and recommit to keeping them — or change them if they are no longer appropriate.
 - “Let's take a few minutes to review our agreements. When we get into a deep discussion in which we have differing perspectives, it is important to remember what we agreed to do to



support one another and maintain a healthy, productive team.”

- **Seek commitments** to temporary actions with a plan to review them again at the next meeting or within a short period of time.
 - “While we might not all agree, I wonder if we can try the regrouping at least twice and revisit whether we think it contributes to students’ learning again after that.”

Facilitators sometimes combine strategies. At other times, following one attempt with a deep breath and waiting is effective because it acknowledges the challenge and gives team members permission to handle it on their own, leaving the facilitator free to ensure that the team’s ways of handling the situation protects every member’s personal safety, adheres to the agreements, and keeps members focused on their collaborative learning and work.

Assessing teams

Continuous improvement requires periodically assessing the team's effectiveness. When teams are new, assessing effectiveness and efficiency allows members to make in-process tuneups that help ensure success.

Handouts 8.2 through 8.7 will help teams engage in regular assessment. Each has a slightly different orientation and use. The last tool is for fairly sophisticated teams.

Facilitators can select a tool or ask team members to review tools and recommend one. Follow the assessment with discussion to interpret the results.

When teams are small, members may be uncomfortable responding to surveys because they don't want their responses to be public. Facilitators can bring aggregated results or mean scores to the team for discussion; however, facilitators also might engage members in a discussion to assess their effectiveness and efficiency.

- Identify a time when you think our team was at peak performance. What made it a peak? What can we do as a team to create more experiences like this?
- Recall a time that you felt the work took longer than necessary. What might have contributed to the extra time? Were the results of our work worth the extended effort? How will considering these past efforts help us when we find ourselves in a similar situation in the future?
- What results can we be most proud of as a team? What have we learned collectively?
- What has been our biggest challenge? What did we do to address it? How else might we have addressed that challenge? How did the challenge and the way we addressed it affect us as a team?
- Name one action you will take as a result of assessing our team's work, a different action that will contribute to the team's success. How can we help you be successful with this action?



Tools For Schools

COMMENTS TO FACILITATOR

This tool will assist various teams in assessing how well they attend to the basics of successful meetings. In order for this tool to be used effectively, team members must have agreed on a set of norms ahead of time. This tool would best be used after the team has met several times and can gauge the team's attention to its goals.

The team can add its own norms in order to adapt this tool for its unique needs.

Ensure anonymity for respondents by having team members fold their surveys and drop them into a box.

Calculate the results privately and share the total results with the entire group publicly during the next team meeting.

Lead a discussion about possible implications of the responses. In what areas is there already substantial agreement that the team is performing well together? What areas does this team need to work on? What are some strategies for improvement in that area?

Team meetings

We start our meetings on time.

Never 1 2 3 4 5 6 7 Always

We review and develop the meeting's agenda/goal before the meeting begins.

Never 1 2 3 4 5 6 7 Always

We set time limits for the meeting.

Never 1 2 3 4 5 6 7 Always

We identify a recorder to compile notes of the meeting.

Never 1 2 3 4 5 6 7 Always

We encourage participation by all members.

Never 1 2 3 4 5 6 7 Always

We summarize what we have accomplished in each meeting before concluding the meeting.

Never 1 2 3 4 5 6 7 Always

We briefly evaluate each meeting in terms of efficient, productive use of time and each member's concerns.

Never 1 2 3 4 5 6 7 Always

We end our meetings on time.

Never 1 2 3 4 5 6 7 Always

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Tools For Schools

COMMENTS TO FACILITATOR

The facilitator should prepare individual sheets ahead of the team meeting and distribute to team members. Before distributing, tell them when results will be available and how results will be used.

Ensure anonymity for respondents by having team members fold their surveys and drop them into a box.

Calculate survey results privately and share the total results with the entire group publicly during the next team meeting.

Lead a discussion about possible implications of the responses. In what areas is there already substantial agreement that the team is performing well together? What areas does this team need to work on? What are some strategies for improvement in that area?

Rate yourself as a team player

Effective school improvement teams are made up of individuals who respect each other and work well together. Your behavior has an enormous impact on the team’s ability to do its work efficiently and effectively. The following is a series of questions about your behavior in your work group. Answer each question honestly. There are no right or wrong answers. Describe your behavior as accurately as possible.

1. I offer facts, opinions, ideas, suggestions, and relevant information during my team’s discussions.

Never 1 2 3 4 5 6 7 Always

2. I express my willingness to cooperate with other group members and my expectation that they will also be cooperative.

Never 1 2 3 4 5 6 7 Always

3. I am open and candid in my dealings with the entire group.

Never 1 2 3 4 5 6 7 Always

4. I support team members who are on the spot and struggling to express themselves intellectually or emotionally.

Never 1 2 3 4 5 6 7 Always

5. I take risks in expressing new ideas and current feelings during a team discussion.

Never 1 2 3 4 5 6 7 Always

6. I communicate to other team members that I am aware of and appreciate their abilities, talents, capabilities, skills, and resources.

Never 1 2 3 4 5 6 7 Always

7. I offer help and assistance to anyone on the team in order to improve the team’s performance.

Never 1 2 3 4 5 6 7 Always

8. I accept and support the openness of other team members, supporting them for taking risks and encouraging individuality.

Never 1 2 3 4 5 6 7 Always

9. I share materials, books, sources of information, and other resources with team members in order to promote the success of all members and the team as a whole.

Never 1 2 3 4 5 6 7 Always

10. Three things I might do to increase the effectiveness of our team include:

1. _____
2. _____
3. _____

April/May 2001

Adapted with permission of the South Carolina State Department of Education.



Protocol for discussing survey results about team effectiveness and/or team meetings

Use the compiled data from a survey of team effectiveness or team meetings to discuss the survey results.

Which item has the highest mean score?
What evidence did we each use to support our score in this area
What evidence did we each use to support our score in this area?
Which item has the lowest mean score?
What evidence did we each use to support our score in this area?
On what item(s) did team members agree the most? Examine both the mode and range to answer this question.
What conclusions can we draw about the efficiency and effectiveness of our collaborative professional learning teams?
What actions might we take to increase the efficiency and effectiveness of our collaborative professional learning teams?

Source: Killion, J. & Roy, P. (2009). *Becoming a learning school*. Oxford, OH: Learning Forward.



Learning Team Survey

School _____

Subject/grade level _____

1. How many times have you met with your learning team?
 1-3 4-6 7+ Have not met

2. What rating best describes your feelings about these meetings? Scale: 1 (most negative) to 10 (most positive).

Most negative (-)	1	2	3	4	5	6	7	8	9	10	Most positive (+)
Unproductive											Productive
Non-task oriented											Task oriented
Not well facilitated											Well facilitated
Incompatible group members											Compatible group members
Less than honest communications											Honest communications

3. What, if any, are the positive impacts of these meetings on you personally?

4. What, if any, are the negative impacts or concerns you have had with the learning team meetings?

5. Rate the benefit of participating on a learning team. Scale: 1 (not much benefit) to 5 (a great deal of benefit).

To what extent have you gained ...	Circle choice				
New knowledge about teaching and learning?	1	2	3	4	5
New insights about how to reach certain students?	1	2	3	4	5
New ideas about how to improve the way you teach?	1	2	3	4	5
New perspectives on your strengths and weaknesses in teaching?	1	2	3	4	5
A new outlet for expressing and sharing frustrations, concerns, problems with teaching?	1	2	3	4	5
Greater confidence in using a wider range of instructional and assessment methods?	1	2	3	4	5
A stronger sense of connection or support from other teachers?	1	2	3	4	5
A greater sense of yourself as a professional?	1	2	3	4	5

6. With regard to your selected team focus, how successful has your group been with each activity listed here?
 Scale: 1 (not at all successful) to 5 (extremely successful).

How successful has your learning team been with ...	Circle choice				
Analyzing and discussing student needs?	1	2	3	4	5
Reading research and studying successful strategies for addressing student needs, and discussing applications of what we have read/studied?	1	2	3	4	5
Discussing similarities and differences in teachers' approaches and beliefs about teaching?	1	2	3	4	5
Investigating programs, strategies, and materials that might help motivate students?	1	2	3	4	5
Designing new materials, lessons, or assessments for students?	1	2	3	4	5
Trying out new techniques, materials, approaches in teaching and assessing students?	1	2	3	4	5
Sharing successful strategies you currently use?	1	2	3	4	5
Assessing and sharing results of new approaches to teaching with the learning team?	1	2	3	4	5



Learning Team Survey continued

- 7. Of the teachers on your learning team, how many do you think believe the learning team approach has significant potential to help teachers improve students' motivation and performance? (give number)
- 8. Below is a list of activities that support teacher growth and development. Try to assess the activities in terms of whether they were practiced effectively at the school before the learning teams began. Scale: 1 (not very effectively practiced) to 5 (very effectively practiced) before the learning teams began.

	Circle choice				
	1	2	3	4	5
Teachers talked to each other about how they taught and the results they got.					
Teachers learned from each other by watching each other teach.					
Teachers designed lessons, assessments, or units together.					
Teachers critiqued lessons, assessments, or units for each other.					
Teachers reviewed the curriculum across grade levels in a particular subject.					
Teachers developed interdisciplinary strategies to increase student interest and learning.					
Teachers shared articles and other professional resources and read and discussed books.					
Teachers asked each other for advice and help with particular students and topics.					
Teachers visited other schools to examine instructional approaches in other settings.					
Teachers worked together to examine student classroom tests and other student work samples to better understand student strengths and weaknesses.					
Teachers provided moral support and encouragement to each other in trying new ideas.					
Teachers helped each other implement ideas from workshops they attended.					

- 9. In your opinion, what percent of your students have benefited from your learning team participation?
 Less than 25% 26-50% 51-75% 76% +

- 10. Indicate your level of agreement with each of the following statements based on your experiences so far with the learning team. Scale: 1 (not at all) to 5 (a great deal).

I think my participation on the learning team will ...	Circle choice				
	1	2	3	4	5
Improve my overall teaching effectiveness.					
Improve my skills in helping students learn.					
Change my perceptions about some students' learning abilities.					
Increase my understanding of how to motivate students to work harder.					
Significantly change how I teach.					
Significantly change how I work with other teachers.					

- 11. Indicate your level of agreement with each of the following statements. Scale: 1 (strongly disagree) to 5 (strongly agree).

	Circle choice				
	1	2	3	4	5
I am enthusiastic about my participation on a learning team.					
I feel a lot of stress during the workday.					
I need more time for learning team participation.					
I am satisfied with my work environment here.					
I am excited by my students' accomplishments this year.					
Student motivation is a major problem here.					
Teachers here tend to do their own thing in the classroom with little coordination.					
I often feel unsure of my teaching.					
Teachers here get along well.					

Source: SERVE, Atlanta.

Summative reflection protocol

As a team, take a minimum of 30 minutes to answer the questions in this protocol. It is not necessary to reach consensus. What is most important is that each team member has an opportunity to share his or her point of view.

Based on the evidence we have now, have we achieved our goal?
What has contributed to our results?
How did working as a team impact the results?
Which of our actions as a team contributed most to the results we achieved?
Which of our actions as a team contributed the least to the results we achieved?
How did our actions as individuals contribute to the results we achieved?
What have we learned as a team this year that has strengthened our instruction and content knowledge?
What have we learned as a team that will help us improve collaboration with other colleagues?
Of all that we learned this year, what are the headlines that we want to share with other staff members?

Source: Killion, J. & Roy, P. (2009). *Becoming a learning school*. Oxford, OH: Learning Forward.

Individual contribution protocol

This protocol is for more sophisticated teams that will not find discussing individual members' contributions too uncomfortable or intrusive. Teams that have been working together for more than a year will benefit most from this protocol. Newer teams should consider other protocols or surveys that look at team performance rather than individual performance.

Purpose: To strengthen the team's functioning by having members reflect on their own contributions and role within the team.

Time: 10 minutes per member

Materials: Prepared responses

BEFORE THE MEETING, EACH MEMBER PREPARES:

- A list of his or her three to five top strengths related to participation in and contribution to the team and examples of how each was demonstrated in recent meetings.
Example: "I ask questions to stimulate our thinking as a team, such as when I asked us to consider what might happen if we were able to reach every student."
- One behavior that he or she wants to change related to participation in and/or contribution to the team and why he or she wants to change that behavior.
Example: "I want to be more thoughtful when I speak in our meetings. Sometimes I just blurt out what I am thinking. When I do that, I interfere with others' thinking and sometimes don't give others a chance to speak."

AT THE MEETING, EACH TEAM MEMBER TAKES 10 MINUTES TO:

1. Share the list of strengths and the examples. (3 minutes)
2. Ask other team members to add their own examples of the speaker's strengths. (3 minutes)
3. Share the one behavior he or she wants to change and why. (1 minute)
4. Ask other team members to offer ideas about how to make the change and ways monitor this behavior. (2 minutes)
5. Identify one or two of the ways colleagues suggested to change and monitor that change that the speaker feels are appropriate. (1 minute)

Repeat the process until each team member has completed the protocol.

DEBRIEF:

- What did we learn about our team using this protocol?
- What did we learn about ourselves?
- In what way will this discussion help us become stronger as a team?

Source: Killion, J. & Roy, P. (2009). *Becoming a learning school*. Oxford, OH: Learning Forward.