

Facilitator's Notes:

# Recommendations on Facilitating the Planning Process for DL

The Planning Guide is organized for the following purposes:

1. An individual can review it in its entirety to understand the theory of action behind transforming a school for Deeper Learning and the depth of commitment, planning, and implementing that will be required.
2. A team can use it in its entirety as a multi-day exercise, such as a two or three day workshop
3. A team can work through each phase of the planning process throughout multiple one or two hour working sessions over a two- to six-month timespan.

This set of “facilitator’s notes” are to assist you in determining how you want to use the *Guide* and to help you to estimate the length of time and pacing you will need to help a team move through the exercises and develop their plans.

**Materials:** Make sure you have plenty of flip chart paper and markers to record the responses to the exercises. This ensures the conversation and conclusions are documented. Since the exercises are part of an iterative and cumulative process for planning, your team will need to continuously review and reflect on them throughout the planning process.



**PLANNING PHASE**

**OBJECTIVE**

**ACTIVITIES**

**WHO, TIME & NECESSARY SUPPLIES**

**Pre-Guide Work**

To have everyone meet and learn about one another

Conduct a very simple icebreaker or “check in question” that allows everyone to learn a little about one another.

In addition to or in place of the previous warm up exercise, ask each person to complete the following two sentences:

1. I am most proud that our school has

\_\_\_\_\_

2. I am most worried that our school has

\_\_\_\_\_

**Facilitator**



**15 minutes/question**



Use flip chart paper to record their answers

To understand the current work, success, and challenges of your school

Have an individual provide an overview of the school’s performance using student achievement data, as well as data from school climate surveys, teacher surveys, focus groups, college going rates, student retention, disciplinary actions/in school suspensions, etc.

**School Leader, District Administrator, Teacher**



**15-30 minutes**

To ground the transformation work going forward in the realities of the school’s overall performance.

Based on your school-level data, identify the following:

1. What does your school need to improve on, specific to student outcomes?
2. What are you currently doing to ensure students can meet your student outcome goals?
3. What are the things you are currently doing well?
4. And what is challenging?
5. What is your greatest hope for 2 years from now as a result of transforming your school?
6. How do you think this *Planning Guide* will help you?

**Facilitator**



**30-45 minutes**



Use flip chart paper to record their answers

The first three activities can be done in one session as a way to lay the foundation to examine Deeper Learning and refocus the vision of the school.

**PLANNING PHASE**

**1 PHASE**

**Establishing a Vision**

**OBJECTIVE**

**ACTIVITIES**

**WHO, TIME & NECESSARY SUPPLIES**

To understand Deeper Learning

Introduce Deeper Learning Book Discussion: *Deeper Learning: How Eight Innovative Public Schools are Transforming Education in the 21st Century*

This can be a stand-alone activity by an individual, a team, or even used as a professional development activity for all school staff.

There are many questions in the *Planning Guide* as part of the Book Discussion. You do not have to use all of them. To kick off the discussion on the book, consider doing the following:

1. Lead off with the opening question about whether anyone has a favorite teacher, student, example from the book.
2. Lead off every question with a passage or example from the book, including citing specific page numbers.

**Facilitator**



**45-60 minutes**

To develop a clear and coherent vision for Deeper Learning

Follow the Exercises in Phase 1, *Establishing Your Vision*.

**Facilitator**



**45-60 minutes**



Use flip chart paper to record their answers

To finalize your vision statement if you do not have one

Use the previous conversations to write a vision statement.

1. This should be a quick process.
2. If the team gets too bogged down in doing this, simply get the team to agree to general concepts and values that should be reflected in a vision statement.
3. Refrain from "word-smithing"
4. Delegate the completion of the vision statement to a team member who will then circulate it to the team for final approval.
5. The vision statement should be save as you will need it in Phase 3.

**Facilitator**



**15-20 minutes**



Use flip chart paper to record their answers

To devise a plan to communicate your vision

Complete the Communication Planning Exercise in the *Guide* specific to communicating the revised or new vision statement.

**Facilitator**



**30-60 minutes**



Use flip chart paper to record their answers

PLANNING PHASE

OBJECTIVE

ACTIVITIES

WHO, TIME & NECESSARY SUPPLIES

2 PHASE

Understand & Assess the Conditions for Deeper Learning

To understand and assess the Theory of Action and the Four Components

There are three ways to use Phase 2 to help your team understand the theory of action and determine the degree to which each component currently exists within your own school.

**Option One:** If the team does not review the theory of action and the example of how each of the sequential components contributes to establishing a foundation for Deeper Learning previous to the workshop, then they will need to do the following:

1. During the workshop, each team member reviews each practice for the core component of the Deeper Learning theory of action one at a time.
2. After reviewing one component, have the team complete the self-assessment for each practice and the degree to which their school currently has the practices in place by giving a rating where the school falls on the continuum (1, 2, 3, or 4). Write down specific evidence that supports the ratings in the box as well.
3. Once individual ratings are complete, have each team member share his or her rating and evidence for the rating. There should not be a discussion yet and team members should not challenge each other while they are sharing their ratings. The facilitator should record the individual ratings on a flip chart for everyone to see.
4. After everyone provides their ratings, the facilitator needs to help the team calibrate the ratings and establish a level of consensus of the ratings for each category. The facilitator will record the collective rating and evidence in support of the rating.
5. Using the team's collective rating of each principle, the team should identify and record areas of strength and challenges their school has around that specific component.
6. Repeat this process for each component.

Facilitator



4 hours minimum without pre review work (1 hour/component)



Use flip chart paper to record their answers

PLANNING PHASE

OBJECTIVE

ACTIVITIES

WHO, TIME & NECESSARY SUPPLIES

2 PHASE

Understand & Assess the Conditions for Deeper Learning

To understand and assess the Theory of Action and the Four Components

**Option Two:** To accelerate this process, before the workshop each team member should read the Theory of Action and all of the examples of how each of the sequential components contributes to establishing a foundation for Deeper Learning. Then, each member should complete the self-assessment. If this is completed before the workshop, this allows the team to spend their time together reconciling the ratings to reach some level of consensus.

1. In each session, team members should share their understanding of the component they are going to assess and, most importantly, share their rating and evidence for the rating. There should not be a discussion yet and team members should not challenge each other while they are sharing their ratings. The facilitator should record the individual ratings on a flip chart for everyone to see.
2. After everyone provides their ratings, the facilitator needs to help the team calibrate the ratings and establish a level of consensus of the ratings for each category. The facilitator will record the collective rating and evidence in support of the rating.
3. Using the team's collective rating of each principle, the team should identify and record areas of strength and challenges the school has regarding that specific component. Repeat this process for every component.



**Facilitator**

2 hours with pre work

Use flip chart paper to record their answers

To understand and assess the Theory of Action and the Four Components

**Option Three:** If the team has only short blocks of time available, then use the accelerated review process in Option #2 but no less than every two weeks, or even once a week review, assess, and calibrate the ratings and evidence, and identify strengths and challenges as a team.



**Facilitator**

Set aside a minimum of 45 minutes/session.

Use flip chart paper to record their answers

PLANNING PHASE

OBJECTIVE

ACTIVITIES

WHO, TIME & NECESSARY SUPPLIES

3 PHASE

Planning for Deeper Learning

To identify potential strategies to lay the foundation for Deeper Learning

Based on the strengths and challenges the team identified in the self-assessments you conducted in Phase 2, use Exercise 1 in Phase 3 to identify potential strategies.

1. As a facilitator, have the team identify and record any structures, activities, or practices already in place that, if done better or more intensively, would address the challenges or weakness for each of the four components identified in Column A. Record on Flip Chart or on the Screen using the template provided in the *Planning Guide*.
2. Have the team identify and record the challenges or areas of improvement for each of the four components in Column B
3. Have the team identify and record new structures, activities, or practices need to be implemented for each of the four components in Column C. The examples, or vignettes, you reviewed from Phase 2 can serve as a source of ideas.
4. In Column D, have the team identify and record any existing structures, activities, or practices currently in place which should be *discontinued* because they do not address the challenges or even contradict their vision for DL. This is sometimes the hardest thing to determine.

This activity should be done quickly given the self-assessment and reflection process that was conducted in Phase 2. This is similar to a brainstorming activity as these are just ideas to help the team begin to identify potential strategies. The recording should be preserved as it will be used in Phase 3.

Facilitator



30 minutes



Use flip chart paper to record their answers

**PLANNING PHASE**

**OBJECTIVE**

**ACTIVITIES**

**WHO, TIME & NECESSARY SUPPLIES**

**3 PHASE**

**Planning for Deeper Learning**

To determine the potential impact of each of the strategies identified

Using Exercise 2, draw a 2x2 matrix on a white board or flip chart and label the two axes, one as "impact" and one as "difficulty to implement." Then divide the matrix into four quadrants from "low to high." Have the team use this matrix to collectively discuss the potential impact of each strategy they identified in Exercise 1 by identifying the degree of difficulty to implement each strategy. The team can do this in different ways such as:

1. Individuals from the team can work in pairs on different components to conduct the analysis of the potential strategies for each component. Once each pair completes their analysis, they share with the team. The team has to establish some level of consensus.
2. The entire team can conduct the analysis of the potential strategies for each component.
3. The team can be divided into two groups and divide up the analysis of the potential strategies for each component.

**Facilitator**



**1-3 hours**



Use flip chart paper to record their answers

Any variation of this exercise can take 1-3 hours depending on the number of strategies the team identified in Exercise 2 and the degree of agreement on the difficulty and impact of each of the potential strategies.

To Set Strategic Priorities

After the team has analyzed each of the potential strategies against the 2x2 Matrix, they need to prioritize the strategies by answering the questions in the *Planning Guide* in the second half of Exercise II. The Facilitator can record the answer to each question on a single sheet of Flip chart paper. At the very least, the facilitator should record the answers to Question E from Exercise 3 in Phase 3 as this will be the cornerstone of the next exercise.

1. What potential strategies have a limited impact and are difficult to implement?
2. What potential strategies have a limited impact and are easy to implement?
3. What potential strategies have a high impact but are difficult to implement?
4. What potential strategies have a high impact and are easy to implement?
5. Based on the above questions, which potential strategies should be your top priorities? This list needs to be preserved as it will be needed for Phase 3.

**Facilitator**



**30 minutes**



Use flip chart paper to record their answers

**PLANNING PHASE**

**OBJECTIVE**

**ACTIVITIES**

**WHO, TIME & NECESSARY SUPPLIES**

**3 PHASE**

**Planning for Deeper Learning**

To Create Strategic Action Plans as the Basis of Your Plan for Deeper Learning

For Exercise 4, the team should be divided in half or work in pairs to create a Strategic Action Plan for each strategy using the template in the Guide. The team will need to decide if they want to only complete the first part of the Strategic Action Plan Template or the second part as well.



**Facilitator**

**2-4 hours**



Use flip chart paper to record their answers

This exercise can take 2-4 hours depending on the number of strategies your team has identified as well as whether they will complete both sections of the Strategic Action Plan.

To Put it All Together as part of a Plan for Deeper Learning

The team is exhausted by now and there are two choices here:

1. Take time to use Exercise 5 as a reflective activity and concluding exercise that provides closure to all of the work they have done in Phase 2 and Phase 3.
2. Have the Facilitator or an appointed person from the team complete the Summary Strategic Action Plan Matrix based on all of the notes and then send it out to the team and/or use it to kick off Phase 4.



**Facilitator**

**30 minutes**

**4 PHASE**

**Monitoring Your Plan**

To establish a Monitoring Process for Strategy Leaders

This is really an overview in that the exercises cannot be completed until at least one month into implementation. The team should understand the role of the Strategy Leader in monitoring the progress of the Strategic Action Plans that are to be implemented and the need to use data, both implementation and impact data, to assess progress. Most importantly, they need to understand the need to be transparent as a way to problem-solve implementation challenges and stay on track. The team will need data to monitor implementation, so you may need to help them review the multiple Strategic Action Plans to ensure that the team identified key data metrics for implementation and impact.









**Facilitator**

**10-15 minutes**



Use flip chart paper to record their answers



PLANNING PHASE	OBJECTIVE	ACTIVITIES	WHO, TIME & NECESSARY SUPPLIES
<b>4</b> <b>PHASE</b> <b>Monitoring Your Plan</b>	<p>To establish a Monitoring Process for Deeper Learning Design Team</p>	<p>Just like the exercise above, this is really an overview in that the exercises can not be completed until at least one month into implementation. The team should understand their role in monitoring the progress of the Strategic Action Plans that are to be implemented and their need to use data, both implementation and impact data, to assess progress. Most importantly, they need to understand the need to be transparent as a way to problem-solve implementation challenges and stay on track.</p>	<p><b>Facilitator</b></p> <p> <b>10-15 minutes</b></p> <p> Use flip chart paper to record their answers</p>
	<p>To devise a communication plan to share your vision, plan and progress with key school stakeholders.</p>	<p>Complete the Communication Planning Exercise in the Guide specific to communicating the revised or new vision statement and progress to key school stakeholders.</p>	<p><b>Facilitator</b></p> <p> <b>45 minutes</b></p> <p> Use flip chart paper to record their answers</p>
<b>Next Steps</b>		<p>To devise a communication plan to share your vision, plan and progress with key school stakeholders.</p> <ol style="list-style-type: none"> <li>1. What excites you most about what your team just accomplished?</li> <li>2. What concerns you most about implementing your plan?</li> </ol> <p>You should schedule your first follow up meeting to review the success of the 30-day immediate next steps from Phase 3 and determine if everyone, particularly the Strategy Leaders, understands their roles.</p> <p>If you have time, it would be helpful if the team also reflected on the following questions and submitted their responses to <a href="mailto:monica@monicarmartinez.com">monica@monicarmartinez.com</a></p> <ol style="list-style-type: none"> <li>1. What did you find useful about the Guide?</li> <li>2. How can the Guide be improved?</li> <li>3. How did you use this Guide, for what grades and with what team?</li> <li>4. Who facilitated your planning process?</li> </ol>	<p><b>Facilitator</b></p> <p> <b>10-20 minutes</b></p> <p> <b>Optional:</b> Use flip chart paper to record their answers</p>