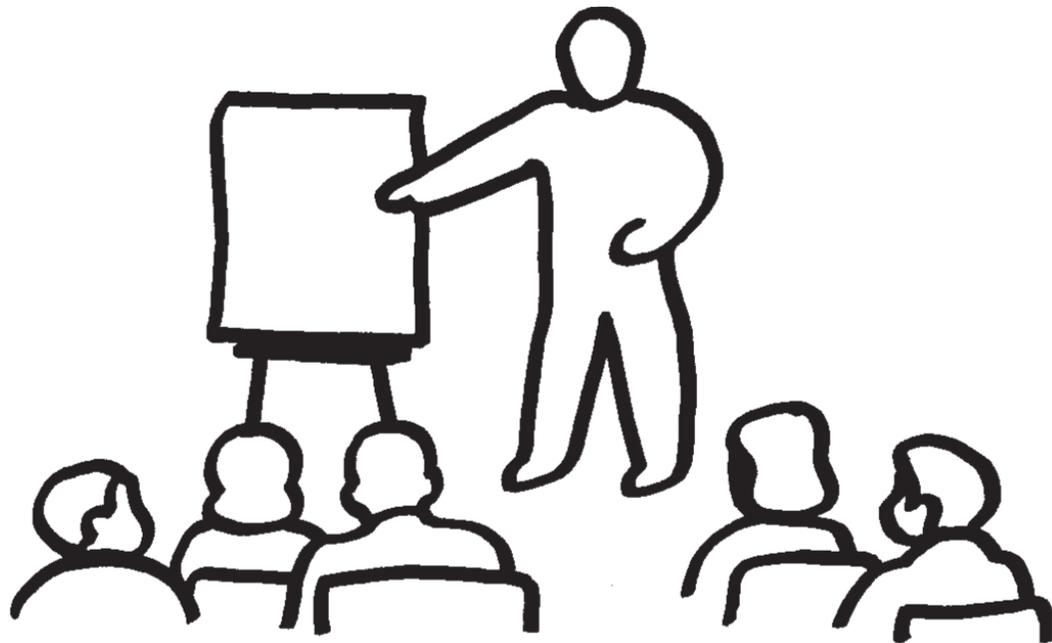




# Leading Groups: Effective Strategies for Building Professional Community



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**Laura Lipton & Bruce Wellman, Co-Directors**

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# Seminar Outcomes

- To learn principles and formats for designing effective group work;
- To develop flexibility with three group leadership stances: presenting - collaborating - facilitating;
- To apply concepts and skills for framing group purposes, tasks and processes;
- To expand a repertoire of strategies for energizing groups and supporting information processing;
- To refine a toolkit of verbal and nonverbal skills and moves; and
- To increase confidence when dealing with difficult topics and difficult groups.

Seeking to understand and acting on the best we know creates the essence of professional life. -- Joyce & Calhoun

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To understand is to grasp meaning .... To grasp the meaning of a thing, event, or situation is to see it in its relations to other things: to note how it operates, what consequences follow from it, what causes it, what uses it can be put to.... Things gain meaning when used as a means to bring about consequences .... the relation of means to consequences is the center at the heart of all understanding.

---- John Dewey

# Those Who Would Be Leaders in Education Must Be Leaders in Learning

*We can rationalize the failures of the past  
Or we can learn from them.*

*We can complain about the troubling inadequacies of the present  
Or we can face them.*

*We can talk and dream about the glorious schools of the future  
Or we can create them.*

*If we want children to learn to think and read  
We must show them thoughtful people,  
eager to take in new information.*

*If we want them to be brave and resourceful  
Let them see us risking a new idea or finding a way.*

*If we want them to be loyal, patriotic and responsible  
Let us show them that we can be true to our deepest principles.*

*If we want new and better schools  
We will have to be new and better people.*

Marilyn Ferguson

Towards a Quantum Mind

# Crafting the Container

Structuring choices greatly affect the outcomes of collaborative group work. These basic design elements set the stage for focusing energy on the task at hand, balancing the participation of group members and most importantly for producing a psychologically safe forum for participants to contribute ideas and to question the contributions of others. Effective design choices increase a group's capacity to address hard-to-talk about topics and serve to shape thoughtful dialogue and productive discussions.

- **Starting the conversation**
- **Structuring the conversation**
- **Sustaining thinking in the conversation**

Purposeful structures maximize the efficient use of time and increase the quality of both interactions and results. Novice groups require formal structures to scaffold success. More expert groups know when to select formal structures to match the emotional and cognitive demands of their work. Higher performing groups are not harmed by structure, and groups and group members that need it will be greatly aided by structure.

It is always wise to remember that not every participant in a high performing group may be personally skilled in group processes. The following three categories describe choice points for group leaders

## Group Size and Composition

How large should the working group be? Using pairs and trios and quartets greatly increases active participation and establishes a working climate for safer interactions. Many groups, both large and small, err in attempting to do the bulk of their work as a committee of the whole. Partners can be pre-assigned or randomly selected using partnering sheets such as choosing seasonal partners by having participants mingle and use a recording sheet with seasonal icons and space for partner names.

How should working group be composed? Balancing the knowledge and experience base within small task groups spreads the talent within the larger group and breaks down any factions that might exist. Purposely structured pairs, trios or quartets can be effective with certain tasks. At appropriate points, pairs can join other pairs to form quartets to widen the conversation.

## Length of Time

How long should any working group stay together? Small groups are effective for text-based tasks, idea generation and data exploration. By varying the length of time that groups work together and regrouping periodically, individuals within a larger group develop deeper working relationships and greater knowledge of each other. Switching partners also provides a period of purposeful movement for energy and brief social interaction. One pattern for intact groups is to establish base groups that meet regularly and employ informal partnering for designated tasks.

## Degree of Structure

How much structure does *this* group require for *this* task? Structure increases productivity and engagement. As indicated above, most groups are not harmed by structure. By developing a repertoire of shared strategies and protocols, working groups enhance success and satisfaction. Some fundamental structures include the use of public recording on chart paper so that all can see ideas and information, providing individual writing time and space before a conversation starts, using a round-robin-pattern for sharing ideas, using a public timer to guide processes and assigning roles, such as that of a facilitator, a recorder, and a materials manager.

# Principles for Leading Productive Groups

- Describe what, why, how
- Establish spatial anchors
- Show- don't say
- Decontaminate problem space
- Create a third point
- Choose voice

# Principles for Leading Productive Groups

- Make text the expert
- Signal stance change
- Capture attention first
- Apply a diamond pattern
- Separate attention from message:
  - Do not talk when moving
  - Freeze gestures
  - Attend to breathing patterns
- Use pronouns with purpose

# Premises & Practices for Leading Groups

## **Prem-ise (n):**

*a proposition that forms the basis of an argument or from which a conclusion is drawn.*

## **Prac-tice (n):**

*the process of translating an idea, plan or theory into action*

### **1. Groups develop and their development can be positively influenced.**

Groups are not static entities. They embody potential and the possibilities for change and growth. Group potential can only be realized by picturing the group, not as it is, but as it might be.

Development requires performance standards, self-assessment tools, protocols and structured reflection. Groups that are too busy to reflect are too busy to learn and too busy to improve.

**Practice:** *The group leader's mindset matters.* Skillful leaders believe in the group's potential and take responsibility for developing the group and protect time to plan and to reflect.

### **2. Human behavior has a biological and sociological legacy.**

Social, emotional and mental responses have roots in a primate past. Humans have finely tuned threat detection systems for reading and responding to the signals of others. Thus, cognitively complex work requires psychologically safe environments.

Enculturated social boundaries shape collaborative interactions. The result is closed classroom doors, reticence to publicly question a colleague's instructional practices and low relational trust.

Traditional patterns of school organization limit opportunities for group development. Scheduling constraints, lack of shared space, and expectations of professional autonomy curtail opportunities for collaborative engagement and growth.

**Practice:** *Group leadership requires attention to pattern breaking, pattern making and pattern taking.* Skillful leaders identify non-productive patterns and structure interactions to produce behavioral change.

*What are some connections to your work related to premise 1 & 2?*

### 3. There are predictable dynamics in groups.

While no group is exactly the same as another, or even as itself from one meeting to the next, there are patterns that can be anticipated and that inform meeting design and interaction. Sources of comfort and discomfort vary for individual group members and group leaders. This dynamic can emerge as task, decision or conflict avoidance. It also can lead to reinforcement of low expectations for the group and the group's work.

Four tensions are classic in all groups:

*Task – Relationship:* Values about how time should be used, the press for efficient work completion and the need for all voices to be heard produces tension in groups. Differing preferences for attention to task and patience with process cause friction and limit productivity.

*Certainty – Ambiguity:* Individual group members vary dramatically in their need for surety before moving forward with plans of action. Comfort with some degree of ambiguity is essential for initiatives to begin. Groups bog down when this tension becomes polarized.

*Detail – Big Picture:* A focus on the specifics of projects and plans is a source of comfort for some group members, for others a wider and longer term view energizes their work. While each of these perspectives adds value to group work, tensions emerge from these conflicting working styles.

*Autonomy – Collaboration:* The desire for autonomy tempers the potential for collaboration. Individual practitioners who are territorial about their curriculum and instructional practices and other areas of expertise may have difficulty aligning their work to produce the gains of cumulative effect.

**Practice:** *Predictable tensions arise for group members and group leaders.* Skillful leaders acknowledge these tensions and seek balance for the group and for themselves.

*What are some specific examples of these dynamics in your working groups?*

**4. Work sessions should be learning sessions.**

Learning is not optional in a changing world. This notion is especially true for educational practitioners charged with producing learning for others. Learning practices should be congruent at all levels of the organization. What we espouse for our children, we should practice for ourselves.

Development as a professional requires a commitment to learning with and from other adults. Opportunities for coming together should not be used for dispensing information, but for processing information and developing shared meaning.

**Practice:** *Meetings are to meet.* Skillful leaders should see and design each meeting as an opportunity to support adult learning.

**5. Investing energy in design saves energy in delivery.**

Clarity of purpose is the foundation of effective design. Clear task and relationship outcomes focus meeting planning and implementation.

Anticipating group dynamics informs choice of structures and strategies for engaging energy, balancing participation and increasing participant satisfaction and productivity. Effective design can reduce or eliminate much of the non-productive behavior that emerges in meetings. Therefore, the process agenda is as important as the content agenda.

**Practice:** *Group leaders plan for cumulative effect.* Skillful leaders design and apply process strategies, structures and stances to increase task focus and develop collaborative relationships.

*Generate a brief summary of key points and ideas related to premise 4 & 5.*

## 6. Shaping the discourse determines direction.

Productive conversations emerge from purposeful choices about what to talk about and what not to talk about. How to talk is also an important choice. Groups require knowledge and skill with different types of discourse, such as the intentions and applications of dialogue and discussion. They also need skill with the verbal and non-verbal tools that make each type productive.

Conversational focus is easily derailed. These off-course excursions are not always ill-intended, but can distract the group from accomplishing its task.

**Practice:** *Group leaders frame the conversation.* Skillful leaders focus group member's consciousness on their own choices concerning what they are talking about and how they are talking.

## 7. You can't lead where you won't go.

Modeling matters. Leaders teach by example. The willingness to take risks, to be vulnerable, to question existing boundaries, both personal and collective, exemplify confident leadership.

Skillfulness develops by setting clear and achievable learning goals, purposeful practice and reflection with feedback.

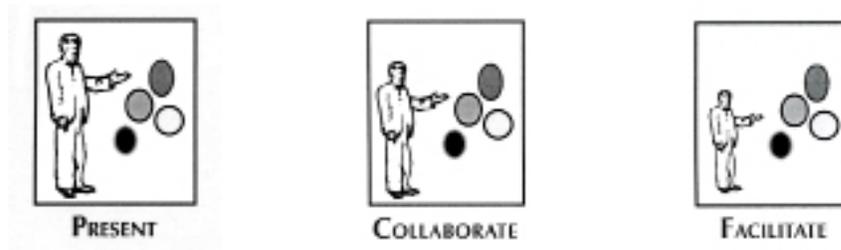
**Practice:** *Leaders need to see themselves as learners and be willing to learn in public.* Skillful leaders articulate their goals and seek feedback from their groups.

*What are some implications of premise 6 & 7 to your work as a leader?*

# Three Stances for Leading Groups

**S**KILLED group leaders consciously select the most appropriate stance for engaging with their groups. These stances include: presenting, collaborating and facilitating. The leader's intention for the session, relationship to the group, the nature of the task or topic and the intricacies of specific strategies are all critical factors to consider when choosing a stance. Each stance is ultimately defined by who is generating and developing the bulk of the information and analysis of any data being considered by the group. When presenting, group leaders provide information and analysis; when collaborating, group leaders and group members share information generation and analysis; and when facilitating, the group members generate the information and analysis.

A leader might occupy a single stance throughout a work session, or switch stances at various points. For example, a department chair might introduce a session task and occupy a facilitation stance for the first part of the meeting. At a point of transition, she might then join the group at the table and collaborate as a colleague for the next segment of the meeting. In another case, a principal might frame a task for a leadership team and then present details of a school improvement planning process before switching to a facilitation stance to clarify understanding and determine next steps for the group.



## Present

To present is to teach and transform group members by enriching and extending their knowledge, skills and attitudes. Successful presentations are outcome driven not activity driven. Clarity of outcomes and success criteria for achieving these outcomes are the most important element in planning a speech, seminar or workshop. A rich repertoire of instructional strategies informs the choices available to the presenter. Matching repertoire to clear outcomes through continuous assessment of goal achievement supports flexibility in-the-moment and over time.

By designing group work and presentations as a learning experience for other adults, skillful leaders focus more energy on the learning and the learners, less energy on the content alone and less energy on themselves as speakers. Knowledge of adult learning and how to productively engage group members is as important as the content itself. In practice, content has little meaning in and of itself. Learners, individually and collectively create meaning from a presentation. By structuring and scaffolding learning experiences for group members, skilled leaders craft presentations that help group members transform information into ideas and ideas into actions.

There are several tensions for thoughtful group leaders when taking a presentation stance. One tension is the trap of expertise. When we have deep knowledge of and commitment to a set of beliefs and ideas, our passions can sometimes overcome our patience. Our preferences can also become our prescriptions, which if shared with conviction and credibility can close off group exploration of ideas and the development of alternative approaches and fresh ways of exploring issues. Another tension is the belief that group leaders need to be experts on a topic to be credible with the group. By making ideas and text the expert, group leaders provide expert information without having to be the expert on every topic. Expertise is ultimately a group capacity in high performing groups and not the province of any one person.

## Collaborate

To collaborate means to work together. In this stance, the group leader and group members co-develop information, ideas and approaches to problems. Mindful group leaders also use this stance as an opportunity to model the ways in which professional colleagues interact as a standard for professional practice. This stance signals trust and respect for group members and a belief in their capabilities as thinkers and professionals. It is important for team leaders, department heads and other members of working groups to save a place at the table for themselves as colleagues so they can be in the room with peers as equals and not be perceived as taking a “one-up” position relative to the group. By preserving such a space, the switch from feet to seat then signals this shift in stance after framing tasks, presenting information or facilitating processes.

Room arrangements and where the group leader is positioned relative to other group members indicates when this is the operating stance. By sitting side-by-side, focused on common information, problems or issues, the group leader physically and symbolically joins the group as an equal. Pronoun use signals stance, as well. By using phrases like “Let’s think about....,” “Let’s generate....,” or “How might we....?”, group leaders invite participation and remove themselves from the spotlight. Group leaders need to carefully monitor their actions when occupying this stance. Their own enthusiasm and interest in the topic or issue at hand may override the intention to co-create ideas and possibilities. False collaboration may build resentment or become a disguised presentation.

Collaboration is hard work. Purposeful talk requires purposeful listening. Group leaders need to know when and how to integrate their own energies with those of other group members. When and how to advocate for processes or specific ideas requires consciousness, tact and patience. As they collaborate, skilled leaders keep part of their awareness on the balcony to monitor interaction patterns, idea flow and group development. Knowing when to withhold their own ideas and listen is as important as knowing when to join the conversation.

## Facilitate

To facilitate means to “make easier”. In flexing to a facilitative stance, group leaders structure sessions and meetings designed for dialogue, discussion, information processing, planning, problem-solving and decision making. Facilitative group leaders direct the procedures used during a session by choreographing the energy within the group and maintaining a focus on one process and one content at a time. A flexible array of nonverbal and verbal tools supports facilitators in this work. While many of these skills are also the tools of presenting and collaborating, they take on added importance within this stance as skilled leaders focus group member’s energy on ideas, information and processes. Permission to facilitate is not derived by role. The emotional state of the group, the time of day, and the topics before the group are some of the variables that influence a group’s dynamic. Group member engagement, cooperation and willingness to take emotional and cognitive risks are the major manifestations of their agreement to engage productively with a group leader taking a facilitation stance.

The facilitation stance assumes that the group leader is taking a neutral position towards the topic before the group. If he or she has preferred outcomes or nonnegotiable positions then taking this stance is not credible with the group. In addition, a leader may need to temporarily shift stance to provide information that might move the group’s work forward. Flexing in, and out, of this stance requires thoughtful framing at the start of the session, especially for emotionally charged topics.

# Participant Resourcefulness: Focusing Attention

1. Sound bites

6. Megaphone

2. Volume change

7. Here is the most important point

3. Silence

8. Choral repeats

4. Visual paragraph

9. Cover and Reveal

5. Finger signals/ number signals

10. Relevant stories, anecdotes and practical examples

## Patterns for Focusing Attention

- Freeze body
- Freeze gesture
- Use a credible voice
- Break and breathe
- From a new space deliver a new message

# Personal Resourcefulness

## PHYSICAL TECHNIQUES

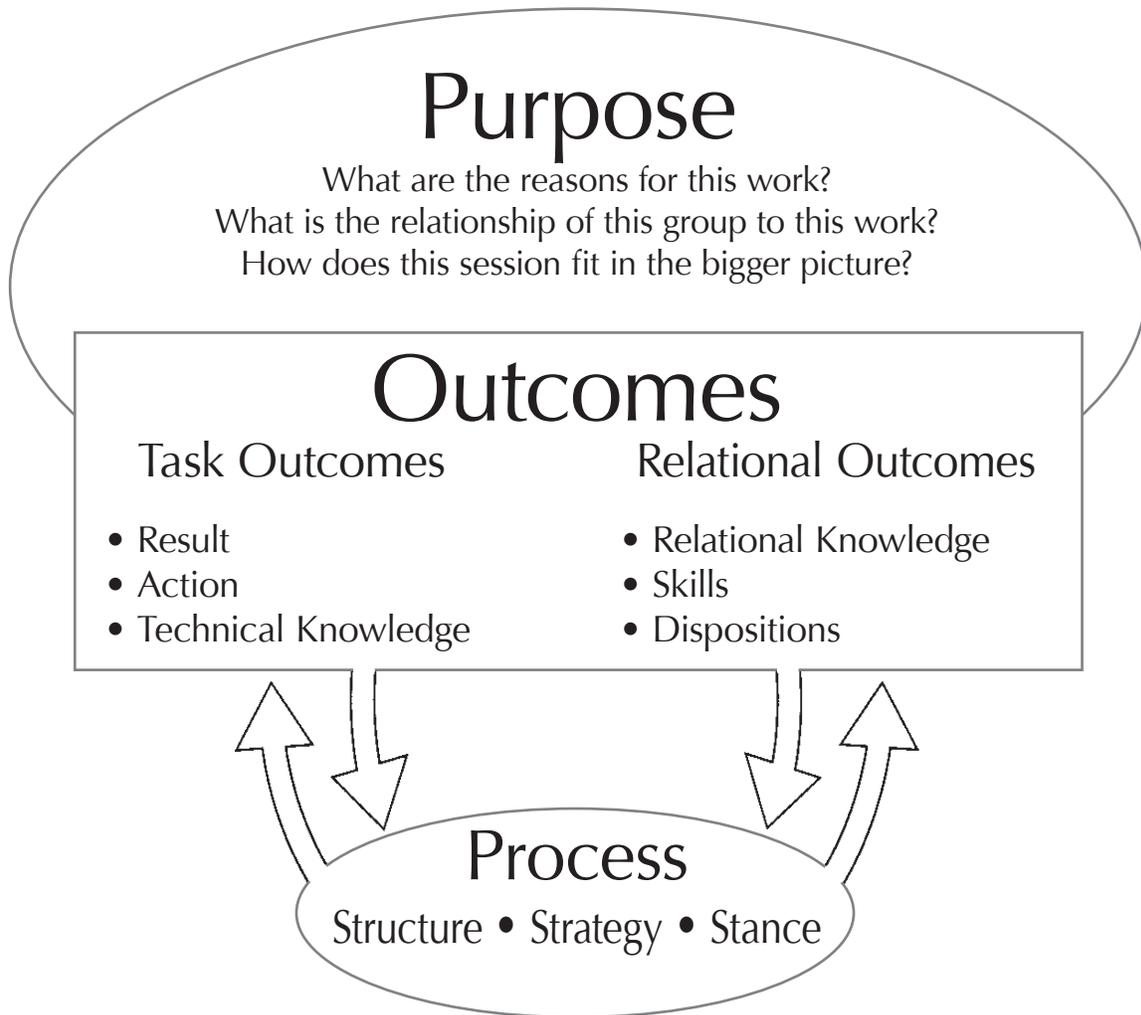
- Breathe
- Progressive relaxation
- Walk
- Uncross your legs
- Dangle your arms/twist your wrists
- Make faces
- Center yourself physically

## MENTAL TECHNIQUES

- Overprepare
- Written notes
- Mentally rehearse
- Reconnaissance
- Take a long view
- Paradoxical intervention
- Prayer or mantra

# The Group Leader's Design Mind

**Anticipate      Monitor      Recover**



# Group Leader's Design Mind: Planning Outcomes

## Types of Outcomes

**G**ROUPS that work are groups in which there is maximum participation, productivity and satisfaction. To lead such groups requires attention to three arenas for group development: task focus, relationship development and a process toolkit of structures, strategies and stances. Productive groups learn from experience by setting goals for themselves, monitoring their performance and reflecting on their practice. Experience by itself is not a reliable teacher. By focusing only on the task at hand, groups may complete the work but not expand their capacities for doing harder or more sophisticated work.

The harnesses of draft horses are fitted with blinders to block peripheral vision and keep the horse's attention on the road or furrow ahead. Many groups operate with similar blinders when they do not organize or prioritize their tasks to increase efficiency and productivity; when they do not attend to relationships within the group to develop their capacities for collaboration and strong professional community; and when they do not attend to developing shared processes for supporting thinking and clear communication.

Skilled group leaders plan in multiple dimensions, being mindful of immediate and longer-term goals for the work and for their groups. Effective leaders view meetings as opportunities for group development, not as isolated episodes. By seeing the potential in their groups, these leaders apply cumulative effect to advance both professional and organizational growth and improvement. Productive group work requires outcome clarity for tasks, for relationships and for processes.

## Task Outcomes

Successful project work results from clarity in three types of task outcomes:

- result outcomes
- action outcomes
- technical knowledge outcomes

## Result outcomes

Achieving result outcomes calls for clarifying success criteria for the group's *products, performances* and *decisions*. These ultimate goals then drive collective work and focus the attention of individual participants. Naming and clarifying the group's desired result outcomes becomes a catalyst for focusing energy and avoiding peripheral issues. Vague goals lead to fuzzy planning and unfocused implementation.

*Products:* What are the product specifications for such elements as style, length and format? Who will produce the final product? What are the deadlines involved in completion?

*Performance:* What are the standards for performance? What defines poor examples? What defines good examples? Who will be the performance assessors?

*Decisions:* Who is ultimately making this decision? Who will be affected by the decision? How will those affected provide input? What is this group's role in the decision-making process (informing, recommending, deciding)? What decision process will be used? How and to whom will the decision and decision-making process be communicated?

## Action outcomes

Actions outcomes typically come in one of three forms: *implementing* some new program or practice; *transferring* knowledge and skills from an existing arena to a new arena; and *desisting* from continuing some behavior, practice or program. While in most cases these outcomes are interrelated, each of these types of actions require specific planning and monitoring systems to ensure fidelity with project goals.

*Implementation:* What is being implemented? Where are the arenas of implementation? What will we see and hear when the program or practice is successfully in place? What support systems will this initiative require to get started and to achieve the initiative's goals?

*Transferring:* What knowledge, skills, practices and procedures are already in place that can be drawn upon to support this new venture? What social and emotional resources exist that will support new learning and project development in this arena?

*Desisting:* What are we asking people to stop doing in order to implement this new procedure, practice or program? How will we know that people are desisting from the prior ways of working? Who loses what by implementing the new venture? What might compensate for the loss?

## Technical Knowledge Outcomes

In order to act, group members need accurate knowledge of the issues that they are exploring. Group leaders need to carefully separate the 'nice to know' from the 'essential to know'. Cognitive science defines three levels of knowledge that professionals draw upon to perform successfully: declarative knowledge, procedural knowledge and conditional knowledge.

*Declarative knowledge* is knowing 'what', for example, names, dates or resources. The ability to name things is the basic information set that group members need to pursue deeper understanding in some arena. The critical planning question is what knowledge is so essential that we need to assess the accuracy of group members' understandings?

*Procedural knowledge* is knowing the 'how-to' skills to implement some desired action. Successful implementation of new instructional practices assumes teacher mastery of procedural knowledge related to the content area. Typically this requires input from experts, modeling and guided practice with coaching and consulting to develop skillfulness with new practices. Clarifying mastery criteria for performances is an important planning task.

*Conditional knowledge* is knowing 'when to' and 'when not to' perform the learned action or implement the new strategy. Conditional knowledge is the most complex of the three types. Developing case studies, scenarios and examples for participants to test is one approach for developing conditional knowledge. Practice, application and feedback are vital for developing sophisticated conditional knowledge. Successful classroom management is a prime example of conditional knowledge in action, that is why it is often so difficult for novice teachers to master.

# Task Outcomes

Purpose

<b>Result</b>	<b>Product</b>	<b>Performance/ Skill Set</b>	<b>Decision</b>
<b>Action</b>	<b>Implement</b>	<b>Transfer</b>	<b>Desist</b>
<b>Knowledge</b>	<b>Declarative</b>	<b>Procedural</b>	<b>Conditional</b>

## Relational Outcomes

Skillful group leaders give equal attention to both task focus and to developing the group as a whole. Leading and developing high performing groups requires attention to multiple dimensions of individual and group dynamics. Ultimately there is no such thing as group behavior. Group behavior emerges from the choices that individuals make in the moment and over time. A key group leadership capability is developing consciousness within and among group members about their choices and the influence of these choices on other group members. The ways in which group members relate to each other and to the work emerge from the ways in which individuals communicate with one another; the regard and empathy they hold for others; and the connections they make between ideas and their personal and collective work. Mindful group leaders craft plans for developing group members' relational knowledge, skills and dispositions. Thoughtful planning requires clarifying a desired state for the group, seeing its members as they might be - not necessarily as they are. Clarity with three types of outcomes supports group development: Relational knowledge outcomes; group member skill outcomes; and group member disposition outcomes.

### Relational Knowledge Outcomes

Three types of knowledge empower proficient group members: knowledge of self, knowledge of others, and knowledge of what makes groups effective. These knowledge sets inform the choices that group members are able to make in the moment and overtime as they learn to navigate the currents of collaborative work.

*Knowledge of self:* To become more self-directed and influential during group work, individual group members must have an operating self-awareness of several personal dimensions: their cognitive strengths and stretch areas related to a specific task; their working style preferences and stretch areas; their values, beliefs and assumptions related to this group's work and to a specific task; and attentiveness to the ways in which their style preferences and worldviews are an asset or a hindrance to group success.

*Knowledge of others:* Skilled group members cultivate both general and specific knowledge of other members of their groups. This knowledge increases both empathy for others and flexibility in approach for working together. Dimensions of knowledge of others includes awareness of: the cognitive strengths and stretch areas for others related to a specific task; the working style preferences and stretch areas of other group members; the values, beliefs and assumptions of other group members related to this group's work and to a specific task; and the ways they might need to flex their approaches to work successfully with their colleagues based on colleagues' style preferences and worldviews.

*Knowledge of effective groups:* Improving groups hold clear standards for performance and continually monitor progress towards those ideals. Essential knowledge includes: standards for skillful group performance; where a group fits along the stages of group development; topics or types of tasks that are especially difficult for a specific group; awareness of types of discourse and reasons for choosing targeted approaches; ways to recognize when a group is stuck coupled to flexible approaches for working through these areas; and systems for monitoring and assessing group development.

### Skill Outcomes

The individual skills of group members are essential to developing high performing groups. The good news is that as skillful group members emerge to help support and focus the group's work, their behaviors have a normative impact on other group members. These more competent group members set an implied standard that becomes a model for others. Three essential skill areas influence the relational outcomes for groups: listening for understanding, verbal and nonverbal tools, and assessment and feedback systems.

*Listening for understanding:* How group members listen to one another is a vital underpinning for both successful task focus and group member relationships. The ways in which group members listen influence their responses and inquiries. Skillful group members monitor their own listening for ways in which they might be filtering information coming from others; they listen to both individuals and to the group as a whole; and they listen for what is not being said, attending to ideas and issues lurking below the surface that might need surfacing.

*Verbal and nonverbal tools:* Productive group work and supportive group member relations rely on skillful application of a set of verbal and nonverbal tools. How group members talk greatly influences both task success and relationships. Skillful group members monitor the ways in which they talk: they monitor and adjust the tone and affect of their responses and inquiries to support and invite thinking; they pause to support thinking and to model habits of reflection; they paraphrase to support understanding and enhance thinking; and they inquire to open or focus thinking.

*Assessment and feedback:* Improving groups require goals for skill development, monitoring and assessment systems for tracking progress, and timely feedback for learning from their experiences. Skillful group leaders have knowledge of: developmentally appropriate skill goals for individual group members; appropriate and efficient ways to monitor skill development; data collections systems to document growth and progress; and appropriate forms of feedback for individuals and for the group as a whole.

### **Disposition Outcomes:**

Relational knowledge and skills acquisition are fueled by essential underlying dispositions. These elements interact with one another synergistically to motivate and guide skills improvement for group members. Essential dispositions include: valuing cognitive conflict, investing in mutual professional learning, and taking personal responsibility for actions and outcomes.

*Valuing cognitive conflict:* Working confidently with conflict is a hallmark of high performing groups. Such groups understand the difference between affective and cognitive conflict. Affective conflict is conflict between people. Cognitive conflict is active engagement with and between ideas. Skillful group members: make distinctions between themselves and their ideas and between others and their ideas; they depersonalize interactions; and they are aware of their own and others' conflict avoidance behaviors and patterns.

*Investing in mutual professional learning:* Successful group members are committed to both personal and collective learning. They learn with and from their tasks, viewing the learning goals as both part and result of productive group work and task accomplishment.

Group members see each other as learning resources; they open their physical and metaphorical doors to share practices with one another; they balance participation during meetings so that all voices have a space for engagement with ideas and others; and they cultivate habits of reflection and protect time in meetings for reflection.

*Taking responsibility:* Individual and collective responsibility for actions and outcomes is an essential disposition for group members. Collective responsibility results from the choices of individuals. A greater sense of collective efficacy emerges when individuals publicly align their commitments and efforts. High performing group members commit to shared purpose and the development of the group; they honor task goals and working agreements; they self-assert for process and content choices to better support their own engagement with the group and to support the engagement of others; and they take responsibility for their own choices and actions both in the group and in their professional practice.

# Relational Outcomes

## Purpose

<b>Knowledge</b>	<b>Self</b>	<b>Others</b>	<b>Effective Groups</b>
<b>Skill</b>	<b>Listening for understanding</b>	<b>Verbal &amp; nonverbal tools</b>	<b>Assessment &amp; feedback</b>
<b>Dispositions</b>	<b>Valuing cognitive conflict</b>	<b>Mutual professional learning</b>	<b>Taking responsibility</b>

# Strategy Harvest: Design Worksheet

## Directions:

1. Review the strategy list and clarify your understanding.
2. Based on your assessment of your group, create a process agenda, choosing strategies for specific task and relational outcomes.

# The Frame: Setting Expectations and Context for Productive Group Work

*Frames are mental structures that shape the way we see the world. As a result, they shape the goals we seek, the plans we make, the way we act, and what counts as a good or bad outcome of our actions.* George Lakoff

## ESTABLISHING PURPOSE

Skillful leaders consciously apply a variety of components to frame task outcomes, timelines, constraints, and expectations for both the work and the ways of working. How this message is delivered is as important as the content. The framing message includes specific elements.

### **The purpose**

This statement defines the purpose of the group, and of the session or series of sessions within a project. It often places the specific group and specific session in context; e.g. what is this group's work? How does it fit within the larger initiatives or directions of the agency (school/district)?

### **The outcomes**

Delineating outcomes might be for the duration of a group's time together and/ or for a specific session; e.g. what are we going to accomplish? What is the work and how will we measure it?

### **The boundaries**

In many cases, it is critical to clarify what the session, task, group is and what it is not. These explicit parameters often state what is flexible from what is non-negotiable; e.g. a decision has been made and the groups' purpose is to determine the most effective implementation. The decision itself (a new program or policy) is not up for discussion.

### **The intentions**

The group leader's explicit assumptions, expectations, and/ or rationale for specific processes are offered to clarify, foreshadow and prepare the group members for the work ahead.

### **The benefits**

Project expectations for the positive results of participation and engagement. These are the "you gets" for individuals and groups. That might sound like "here is what you'll get as a result of your work here today".

### **The logistics**

Sharing simple logistics, such as end time, task timelines, and frequency and location of future meetings sets people's minds at ease and leaves space for more cognitively complex information.

# Delivering the Frame

## **Using Space**

By anchoring a space in the room away from the main working or facilitating space, the skillful leader places “the message” off to the side creating a third point to focus the presentation (Grinder, 1997). Graphic support for this nonverbal message, such as timelines, project success criteria and group norms is positioned in that spot. This strategic placement in the framing space preserves the message, providing an important reference point during the session and as a memory aid for subsequent sessions.

## **Using Body**

Body posture, muscle tension and appropriate gestures establish and communicate confidence and credibility. The most important lesson novice group leaders need to learn is the importance of standing still in the anchored space being used to deliver the framing message. With feet firmly planted on the floor and relaxed shoulders, the “confident” group leader then conveys the framing information by using a frozen gesture to direct group members’ attention to the graphics that support this presentation. By physically referencing these graphics and maintaining personal eye contact with these materials, the leader draws the group’s attention to the message and not to the messenger.

## **Using Voice**

Intonation, including inflection and timbre, establishes and reinforces the message. Framing statements need to be delivered in a credible voice that is purposefully modulated to clarify and explicate the verbal messages described above. Maintaining congruency between tone of voice and content of the message increases the leader’s credibility and group members’ readiness for the task. Pausing at appropriate points reinforces the message and allows group members time to process the information.

## **Using Language**

Syntactical choices matter greatly when framing. For example, pronoun use indicates the relationship of the leader to the group and the group to the work. Is it “our work”, “your work” or “the work”? If the group leader is a member of the group such as a team leader or department head and will be part of the work and project follow-through, it may well be “our work”. If the leader is not a working member of the group, such as a principal or curriculum consultant, it may be “your work”. And, if the task is emotionally hard to handle for some or all group members, the safest course is to use neutral language and say, “the work”.

# The Frame: Sample Templates

Our purpose today is to *enhance the effectiveness of our new reading program*. By the end of our session, we will *define selection criteria and quality standards*. We can expect *to work both in grade level and cross-grade level task teams*. My intention is *to provide structures to guide your work in order to accomplish our task within the allotted time frame*.

Our purpose today is \_\_\_\_\_.  
By the end of our session, we should be able to \_\_\_\_\_  
\_\_\_\_\_  
We can expect \_\_\_\_\_.  
My intention is \_\_\_\_\_ in order to  
accomplish \_\_\_\_\_.

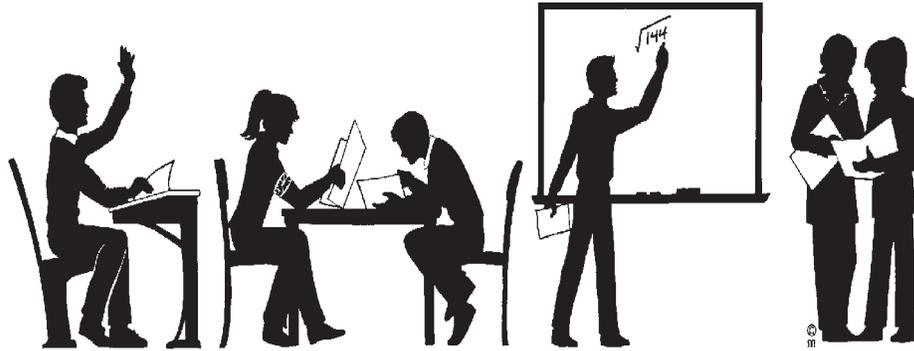
---

Your team's task is to \_\_\_\_\_.  
To achieve this, you will be \_\_\_\_\_.  
As a result, you will be able to \_\_\_\_\_.  
To begin, you will \_\_\_\_\_.

---

This session is one in a series of \_\_\_\_\_.  
There will be meetings monthly, from \_\_\_\_\_.  
The overarching purpose for the work is to \_\_\_\_\_.  
There are several 'givens' necessary to incorporate into the task. These include:  
\_\_\_\_\_  
Given that, please anticipate \_\_\_\_\_.  
To begin, please be aware that the process will include \_\_\_\_\_  
and is intended to produce \_\_\_\_\_.

# Organizing Principles for Teaching and Learning



**1. What learners bring to the learning process matters.** Prior knowledge, complete with misinformation and misconceptions is the starting point for learning, not an obstacle to learning. Learners, then, need access to their own knowledge. Norms of dialogue and collaboration support learners in articulating their knowledge base. In such an environment it needs to be safe not to know. Knowing what we don't know and being able to frame our questions is a personal learning gift.

**2. How we know is as important as what we know.** Action is often driven by unconscious maps. Surfacing these deep structures opens up the possibility of reshaping and reforming belief systems. In this way, we develop shared understandings of how we come to believe and behave as we do.

**3. Learners have a commitment to entire schemes of understanding.** The human brain is a pattern-seeking, sense making organ. Thus, learning is the active engagement of the mind in making sense of information, ideas and constructs. Individual world view or personal schema, shape the integration of discrete bits of knowledge and information. To learn deeply and shift long-held assumptions means to articulate and sometimes confront personal world views.

**4. Knowledge is socially constructed.** How we talk together matters as much as that we talk together about important matters. Respect for differences is essential here. The mutually constructed learning environment is a resource for learning, not the by-product of learning.

**5. Shaping the learning environment is the prime focus of educators.** Rich contexts for learning must be cultivated in the school and classroom. Content expertise about human development, change processes, construction of knowledge and effective educational practices is the quiet assumption in such a model. Process expertise is the public assumption in such a scheme.

**6. Exploration and dialogue with other adults is as much our work as is our time in the classroom.** In order to continue learning, personally and organizationally, it is essential that we plan, reflect, and problem-solve collaboratively with colleagues. These collaborations do not keep us from our work, they enhance our capacity to do our work with style and grace.

Source: Costa, A., Lipton, L., and Wellman, B. (1997). Shifting rules, shifting roles: Transforming the work environment to support learning, in S. Caldwell (Ed.), *Professional Development in Learning-Centered Schools* (pp. 92-114). Oxford, Ohio, National Staff Development Council.

# Nonverbal Communication

**THE PURPOSE:** To enhance credibility and effectiveness as a group leader

To get psychological permission to be in charge:

- of focusing energy and attention
- of supporting understanding of content input and process directions
- of managing transitions and switching stance



## **Separating the Message from the Messenger**

- Go visual
- Get the message off to the side
- The listener's eyes follow the speaker's eyes
- Use neutral language to name the issue(s)  
e.g. it, that, the data, the survey
- Use specific descriptors for issues
- Separate issues from solutions, physically and verbally
- Choose the appropriate voice for each purpose--
  - credible for issues, information and directions
  - approachable for generating ideas, solutions, theories

# Recovery

**Structuring Decisions:** The first level of recovery is to consider modifications to the structuring decisions guiding the design and delivery of the session.

## 1. Group size.

Do your working groups need to be modified? too large? too small? wrong composition?

## 2. Length of time.

Do you need to adjust the time that group members engage with one another? less time? longer time?

## 3. Degree of structure.

Do the strategies and structures you are applying require tightening or loosening in any way? e.g adding a round-robin pattern, using a public timer, using public charting to focus attention.

---

**Managing the Surround:** The surround is the physical environment in which a group is working. It includes: Table and chair arrangements; wall displays; and resource and materials access including technology.

### Considerations:

- Adding/subtracting chairs to avoid energy drains from open spaces or energy blocks from double layers.
  - Adding or removing tables.
  - Table arrangements (U-Shape, square, chevron, classroom)
  - Anchoring charts noting the project's purpose, outcome, logistics and decision-making process.
  - Removing visual clutter
- 

**Direct group leader intervention:** If needed, apply the following patterns.

Anchor a neutral space away from your facilitation or presentation space. Then do one of the following:

### • State the issue as a principle or abstraction.

*“When there is more than one topic on the table at a time, group members have trouble focusing their energy and meeting time is wasted.”*

Then reframe the task and process focus. (Modify as needed)

### • Share the specific behaviors that are problematic as “data” and ask the group about the impact of these behaviors?

*“Since the break there has been an increase in ‘storytelling’. Five people have shared different examples. What is your sense of the ways this might be helping or hindering your task accomplishment?”*

Paraphrase participant responses then reframe the task and process focus. (Modify as needed)

### • Take the group members to the balcony and inquire about their perceptions and feelings regarding what is transpiring.

*“Please pause. Mentally step back from the conversation and take a look from the balcony. What is your sense of what is occurring here and how that is influencing your participation?”*

Paraphrase participant responses then reframe the task and process focus. (Modify as needed)

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# Workbook

## **Leading Groups:** Effective Strategies for Building Professional Community

# Strengths & Stretches:

## A learning and unlearning journey

Strengths

Stretches

# Strengths & Stretches:

## A learning and unlearning journey

Strengths

Stretches

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# Group Leader's Design Mind: Planning Outcomes

## **Purpose**

What are the reasons for this work?

What is the relationship of this group to this work?

How does this session fit in the bigger picture?

## **Task Outcomes**

**Results:** Is the desired result a product, performance or decision?

*Products:* What are the product specifications for such elements as style, length and format? Who will produce the final product? What are the deadlines involved in completion?

*Performance:* What are the standards for performance? What defines poor examples? What defines good examples? Who will be the performance assessors?

*Decisions:* Who is ultimately making this decision? Who will be affected by the decision? How will those affected provide input? What is this group's role in the decision-making process (informing, recommending, deciding)? What decision process will be used? How and to whom will the decision and decision-making process be communicated?

**Action:** In what areas does success necessitate implementation, transfer and desisting?

*Implementation:* What is being implemented? Where are the arenas of implementation? What will we see and hear when the program or practice is successfully in place? What support systems will this initiative require to get started and to achieve the initiative's goals?

*Transfer:* What knowledge, skills, practices and procedures are already in place that can be drawn upon to support this new venture? What social and emotional resources exist that will support new learning and project development in this arena?

*Desisting:* What do the group members need to stop doing in order to implement this new procedure, practice or program? How will we know that people are desisting from the prior ways of working? Who loses what by implementing the new venture? What might compensate for the loss?

**Technical Knowledge:** What level of knowledge is necessary for success; declarative, procedural or conditional? How might I determine and measure the present and desired level of knowledge?

*Declarative knowledge:* What basic information do group members need to proceed with the task? What logistics, facts or definitions would be important?

*Procedural knowledge:* What do group members need to be able to do? What skills or procedures are critical to success?

*Conditional knowledge:* What criteria do group members need to determine when to apply a particular strategy or process? What guiding principles will serve to inform these decisions?

## Relational Outcomes

**Relational Knowledge:** How do individual group members operate within the context of the whole? What understanding do they bring to the group work?

*Knowledge of self:* What degree of self-awareness about cognitive and working styles, values, beliefs, worldviews do group member bring to work sessions? To what degree does this awareness translate into productive collaborative behaviors?

*Knowledge of others:* What degree of awareness of other, related to cognitive and working styles, values, beliefs, worldviews do group member bring to work sessions? To what degree does this awareness translate into productive collaborative behaviors?

*Knowledge of effective groups:* What are our operating standards for high performance as groups? Where is this group in relation to these standards, and how do we know? Does the group recognize when its stuck? What shared tools, processes and strategies are accessible for getting “unstuck”?

**Skills:** What individual group member skills are essential to effective group work?

*Listening for understanding:* How is listening demonstrated during group work? Are responses driven by personal needs or group needs? Are group members listening to both individuals and the group as a whole?

*Verbal and nonverbal tools:* Does the tone and affect of responses and inquiries invite or shut down thinking and further contribution? Do group members pause, as individuals and as a group, to support understanding and enhance thoughtfulness? How does paraphrase function in groupwork to support understanding and enhance thoughtfulness?

*Assessment and feedback:* What tools and data collection systems are operating to monitor and assess group work? How are these data being used to inform growth and development?

*Dispositions:* What are the key group member attitudes that motivate and guide capacity development for high performing groups.

*Valuing cognitive conflict:* To what degree are group members able to make distinctions between ideas and individuals, including themselves? What strategies are in place for depersonalizing interactions? What conflict avoidance behaviors and patterns tend to emerge in the group; and when?

*Investing in mutual professional learning:* Do group members see themselves and others as learning resources? Is participation balanced during meetings? Are doors open to new ideas and to each others' practice? What tools and processes are used consistently for reflection and new goals setting?

*Taking responsibility:* To what degree are group members committed to shared goals and purposes? What happens if/when agreements are violated? How skillful are group members in self-asserting for process and content choices to better support their own productivity with the group? How do group members demonstrate their willingness to be responsible for their own choices and actions?

In what ways is follow-through monitored, measured and maintained?

# Task Outcomes

Purpose

<b>Result</b>	<b>Product</b>	<b>Performance/ Skill Set</b>	<b>Decision</b>
<b>Action</b>	<b>Implement</b>	<b>Transfer</b>	<b>Desist</b>
<b>Knowledge</b>	<b>Declarative</b>	<b>Procedural</b>	<b>Conditional</b>

# Relational Outcomes

## Purpose

<b>Knowledge</b>	<b>Self</b>	<b>Others</b>	<b>Effective Groups</b>
<b>Skill</b>	<b>Listening for understanding</b>	<b>Verbal &amp; nonverbal tools</b>	<b>Assessment &amp; feedback</b>
<b>Dispositions</b>	<b>Valuing cognitive conflict</b>	<b>Mutual professional learning</b>	<b>Taking responsibility</b>

# The Frame

## **The purpose**

This statement defines the purpose of the group, and of the session or series of sessions within a project. It often places the specific group and specific session in context; e.g. what is this group's work? How does it fit within the larger initiatives or directions of the agency (school/district)?

## **The outcomes**

Delineating outcomes might be for the duration of a group's time together and/ or for a specific session; e.g. what are we going to accomplish? What is the work and how will we measure it?

## **The boundaries**

It is critical to clarify what the session, task, group is and what it is not. These explicit parameters often state what is flexible from what is non-negotiable; e.g. a decision has been made and the groups' purpose is to determine the most effective implementation. The decision itself (a new program or policy) is not up for discussion.

## **The intentions**

The group leader's explicit assumptions, expectations, and/ or rationale for specific processes are offered to clarify, foreshadow and prepare the group members for the work ahead.

**The benefits**

Project expectations for the positive results of participation and engagement. These are the “you gets” for individuals and groups. That might sound like “here is what you’ll get as a result of your work here today”.

**The logistics**

Sharing simple logistics, such as end time, task timelines, and frequency and location of future meetings sets people’s minds at ease and leaves space for more cognitively complex information.

# The Frame: Sample Template

Our purpose today is \_\_\_\_\_.

By the end of our session, we should be able to \_\_\_\_\_

\_\_\_\_\_.

We can expect \_\_\_\_\_.

My intention is \_\_\_\_\_ in order to  
accomplish \_\_\_\_\_.

Our purpose today is \_\_\_\_\_.

By the end of our session, we should be able to \_\_\_\_\_

\_\_\_\_\_.

We can expect \_\_\_\_\_.

My intention is \_\_\_\_\_ in order to  
accomplish \_\_\_\_\_.

---

Your teams' task is to \_\_\_\_\_.

To achieve this, you will be \_\_\_\_\_.

As a result, you will be able to \_\_\_\_\_.

To begin, you will \_\_\_\_\_.

---

This session is one in a series of \_\_\_\_\_.

There will be meetings monthly, from \_\_\_\_\_.

The overarching purpose for the work is to \_\_\_\_\_.

There are several 'givens' necessary to incorporate into the task. These include:

\_\_\_\_\_.

Given that, please anticipate \_\_\_\_\_.

To begin, please be aware that the process will include \_\_\_\_\_

and is intended to produce \_\_\_\_\_.

# Leadership Case Study

## Purpose:

What are the reasons for this work?

What is the relationship of this group to this work?

How does this session fit in the bigger picture?

## Logistics:

How many members of the group?

How often does the group meet?

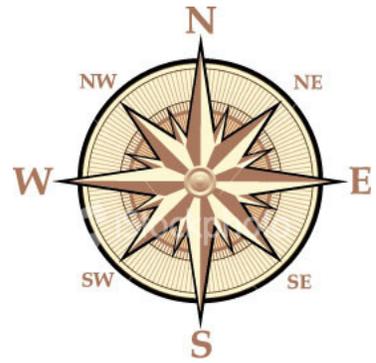
How long are the meetings?

## Dynamics:

What is the composition of this group?

What are some patterns of behavior; both personal and interpersonal?

# Compass Points



## Personal Style

**North -- Just get it done** -- Like to act, try things out, plunge in

**East -- Look at the big picture** -- Like to speculate, consider possibilities before acting

**South -- Consider everyone's feelings** -- Like to hear and honor all voices before acting

**West -- Pay attention to the details** -- Like to know who, what, where why before acting

## Directions:

1. Select the personal style that most describes your personal preference.
2. Cluster at the designated compass point. Form clusters of 3-4.
3. As a cluster create a chart responding to the following prompts:
  - Four strengths of our style
  - Four limitations of our style
  - What others need to know about you to make your work together more successful.
4. Select a style that you find difficult to work with. Move to that compass point.
5. Cluster and explore ways in which, given your preferences, you might stretch to work productively with that style.

<http://www.turningpts.org/tools/htm>

# Quick Starts

## Stem Completions

I'm curious about . . .

I'd like to know more about . . .

For us, as a group, I'm hoping (expecting) . .

## T-Charts:

Hopes/ fears

Strengths/stretches

Successes/challenges

## Lists

What most influences student success in content/skill?

Things we know

Things we want to know?

## Visual Organizers

The first word

Venn diagrams

Webs

## Metaphors

Synectics

Analogies

Life is like \_\_\_\_ (book, movie, song title)

## Templates

Create a recipe for

Want ads

Slogans (bumper stickers, tee shirts)

# A to Z Listing

A

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B

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C

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D

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E

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F

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G

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H

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I

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J

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K

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L

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M

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N

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O

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P

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Q

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R

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S

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T

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U

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V

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W

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X

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Y

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Z

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## The Last Word

**G**

**R**

**O**

**U**

**P**

**S**

# 5 - 3 - 1

**First**, individually, jot down **five** words which bring back your experience of \_\_\_\_\_  
(these may be content connections, feelings, recollections, vocabulary, descriptions, etc.).

**Next**, share your items with your table group, and choose **three**.

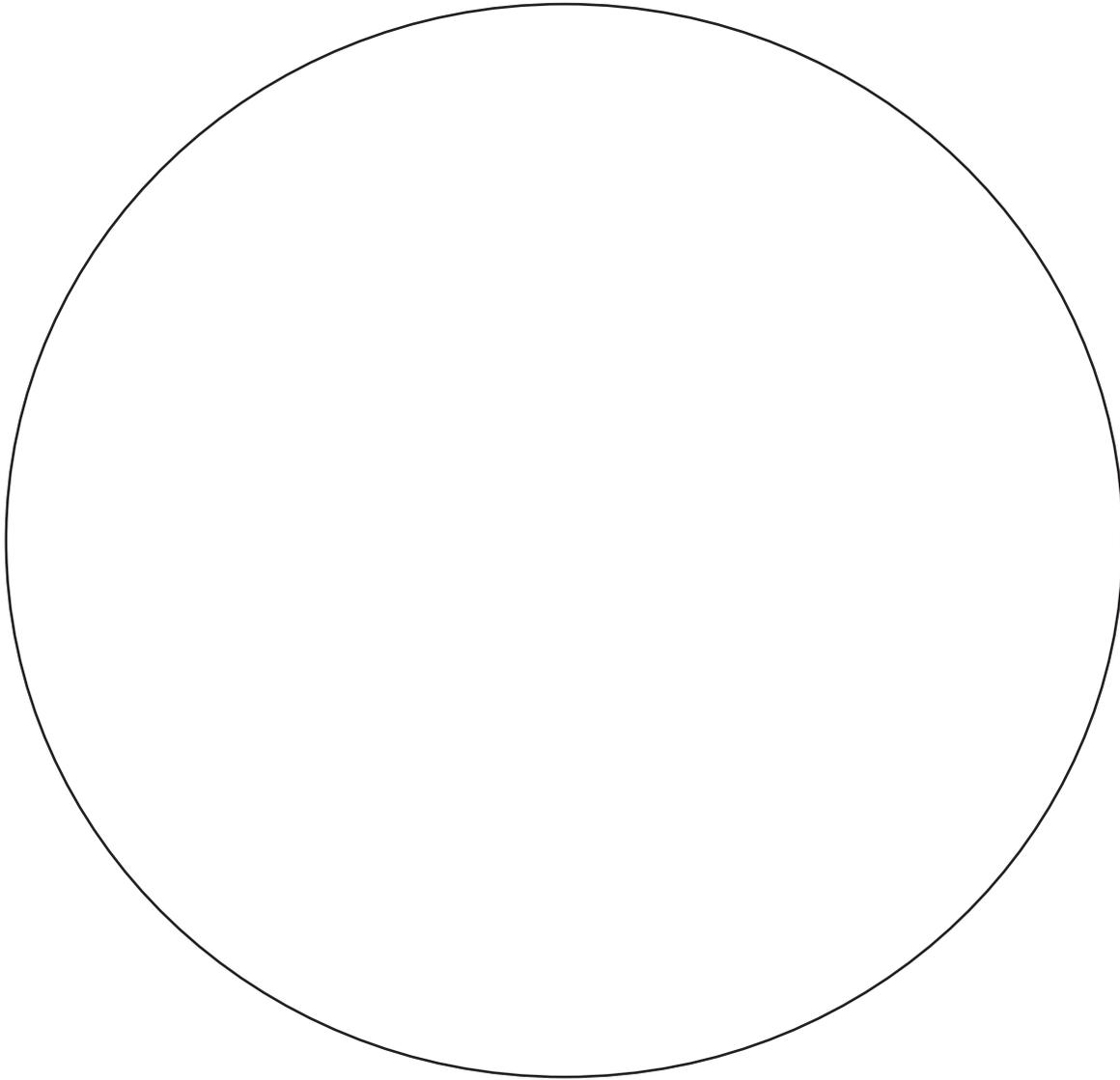
**Finally**, as a group, choose **one** word which captures the essence of the last session - it may

**HERE'S WHAT!**

**SO WHAT ?**

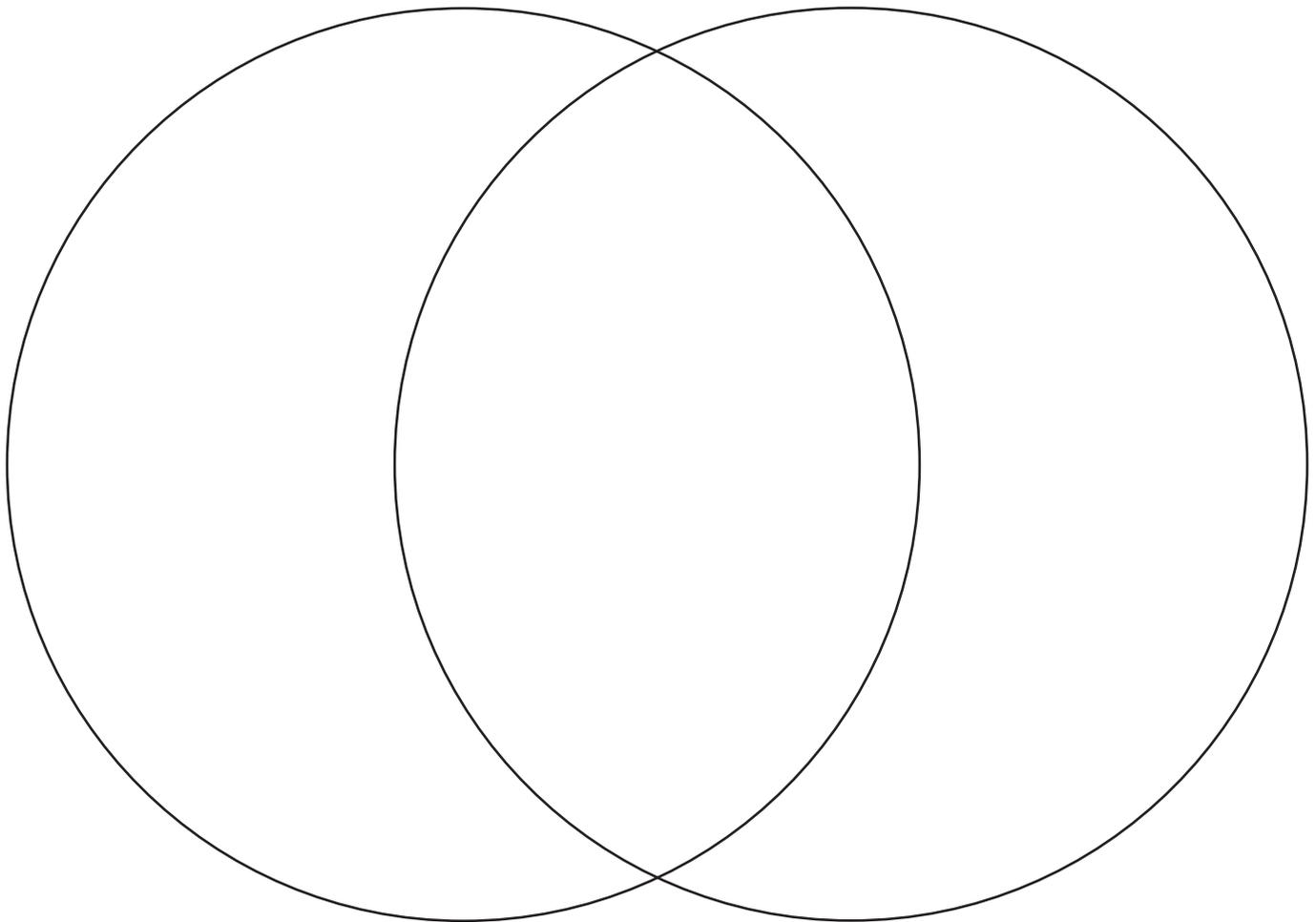
**NOW WHAT?**

# INTER - VENN - TION



My learning goal. . . .

# INTER - VENN - TION



Share your learning goals here:

# Reflections

•

•

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# Walk About Review

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\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME

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NAME

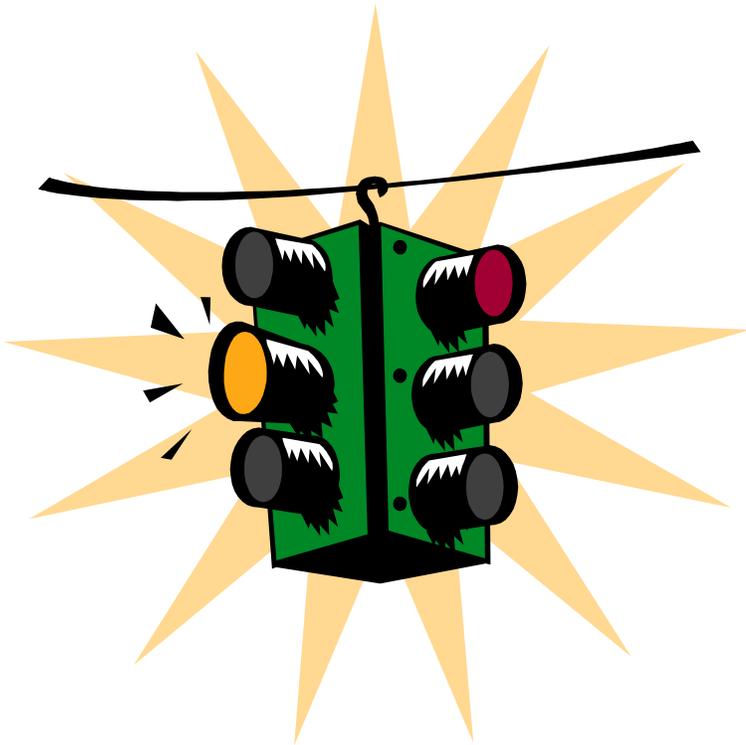
# If... Then...

If I remember to . . .

Then I'll be able to . . .

Based on your learning in this seminar, what might you:

- Stop doing
- Continue doing
- Start doing



# Learning Partners

Make an appointment with 3 different people—one for each image. Be sure you each record the appointment on your page. Only make the appointment if there is an open slot at that spot on each of your forms.

