Phase 4

Activities

NOTE:

Re: Certain Phase 4 Activities

The Member Mapping Activity may be used to expand the team, or merely to identify strategic intervention points and support resources in the larger system. If the team concludes that current makeup of the team is adequate and representational, the following exercises may be unnecessary:

- Selecting an Expanded Team
- Strategies for Enlisting New Members
- Show and Tell the Vision
- Mechanisms for Getting Input From New Members

Member Mapping

Source: *The Team Handbook for Educators.*

Purpose: To create a visual representation of the total system so that the team can see where they need assistance.

Time Required: 45 Minutes

Resources Needed: Newsprint; map of the school building or district; marking pens; crayons; organizational chart.

Procedure:

1. Tape the map of the school or the organizational chart in the middle of the newsprint, leaving a wide margin on all sides.
2. Using a different color crayon or marker for each item, color in the following:
   - the area of the school for which each core team member is responsible;
   - where the informal power in the school/district resides;
   - where the formal power resides;
   - where support for this project might lie;
   - where resistance for the project might lie;
   - where people are who share a commitment to equity;
   - where other key players for the success of this project might be.
3. Draw incoming vectors that indicate key community influences (for example: school board, local power structure, parent groups).
4. When you have finished adding all groups that are or might easily be involved in this project, step back and look for the

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COMMUNICATION

I.1

gaps.
- Who is underrepresented?
- Who is overrepresented?

5. Discuss who is needed to make the team more effective and to represent the entire community.

Reflection/Evaluation:
1. Have you looked at all segments of the community to identify (both inside and outside of school) who might have an impact on the success of all students?
2. Why is it important to look at levels of representation?
3. Is there a pattern in responses to Question 4 above? For those groups that are underrepresented, why might that be?
4. How can the gaps that may show up be bridged? What stategies will be useful in changing patterns? How will you reach balance in your representation?

Selecting an Expanded Team

Source: Judy Borree

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COMMUNICATION

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Purpose: To identify key individuals who should be invited to work on the expanded team.

Time Required: One hour prior to the meeting, in which you actually select the members of the expanded team.

Resources Needed: Newsprint; member mapping chart; your plan, your vision, 3″ x 5″ cards

Procedure:

1. Given the plan and the vision, the team decides how many members it wants on the expanded action team (metateam).

   Things to remember:

   - this is the group that will actually implement the plan;
   - different managing/communication structures are needed if the group is large (10 or more), compared to smaller (see Supplemental Materials, "Managing Structures");
   - the existing team may or may not be the action team (i.e., you may or may not be on the final team);
   - you may decide to go with the team as is;
   - adding members brings the potential for new energy and broader reach;
   - adding new members brings more complexity and the need for an integrating process to bring new members up to speed.

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COMMUNICATION

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2. Looking at the Member Mapping chart, identify key people in strategic (to the plan) areas. Remember to consider both likely supporters and likely detractors. Sometimes including the opposition can be very beneficial, since it forces you to refine your thoughts and actions to be more palatable to all. Try to identify more than one person from each area. Again, this is where you allow yourselves to be expansive and inclusive. You can, and will, narrow the list.
3. Each team member privately makes her/his own list of people she/he would choose to invite to participate.
4. Possible narrowing procedure. Taking turns, each person offers a name and a brief account of the reasons for including that person. Write the name on the newsprint. Continue moving around the group, asking for names, until everyone's list is exhausted. When more than one person chooses the same name, indicate this with hash marks on the newsprint (e.g., "Sally Johnson, ~~||||~~ ").
5. When all of the potential names are on the newsprint, take a few minutes to sit quietly with this list. Then take a break.
6. Write a new list of those people who seem to be clearly agreed upon, if there are any. How does this list fit with the member-mapping chart? How does it fit with the number thought to be necessary for an effective action team?
7. If necessary, repeat items 3, 4, and 5 to fill out additional slots on the team.
8. When the process is complete, each person takes a 3" x 5" card and puts the prospective team members' names on the card, including the existing team. Carry the card with you until the next meeting. Jot thoughts, questions, considerations on the back (e.g., "too heavy on females," "need someone from community," "feels like a dynamic group").
9. At the next meeting, discuss and refine to achieve the final list.

Reflection:

1. When you generated your list of potential recruits, what were your selection criteria?
2. Were the criteria different from those of other members, or did you agree on selection criteria ahead of time?
3. Did you find yourself reverting to stereotype, bias, and prejudice during this process?
4. What did you do if you were aware that you were being influenced by these factors?
5. How do such factors affect team/group interactions and a group's ability to effect change?

Strategies for Enlisting New Members

Source: Judy Borree

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COMMUNICATION

I.1

Purpose: To provide (a) mechanism(s) for approaching prospective metateam candidates.

Time Required: 30-60 Minutes

Resources Needed: Newsprint and markers

Procedure:

1. Write each prospective member's name on a sheet of paper or newsprint.
2. Each team member writes on any prospective member's sheet things they know about how that person might be best approached—e.g.,
   - one-on-one
   - face to face by a friend
   - written proposal with an invitation to join the team
   - inspirational pitch
   - hard, rational data needed
   - other
3. Team decides on which approach to use for each person.
4. Team together outlines basics of the invitationi.e., agreement on basic facts to be communicated about the project.
5. Team decides who will make the approach and when a response will be expected.

Reflection:

- Does each person who is going to approach someone know how to do it and what to say?
- Does each person know what he or she might do in the event of a flat refusal? What is Plan B?

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COMMUNICATION

I. 2

Show and Tell the Vision

Source: Judy Borree

Purpose: To make sure the expanded team, the metateam, understands the vision as it has been developed by the initial "core" team and to share the initial team's process with the new team.

Time Required: To be determined by the team

Resources Needed: Overhead, transparencies, handouts

Procedure:

Note: This activity's procedures are largely invented by the team itself. Keep in mind the following as you work to help the metateam understand the vision:

1. This activity is more than a data transfer. It is a potential bonding experience and energy transfer point, a true sharing of the team's process in arriving at the shared vision. It must, therefore, be designed in alignment with the potential it bears.
2. The team can choose any mode of communicating that it feels would authentically reflect its developmental process: skits, activities that were significant to the team's process, artifacts that represent significant components of the vision. The team will have a chance later to add its unique input to the vision.
3. Often this kind of goal is best achieved in an informal setting: a pot luck, a weekend or day-long retreat, a participatory process like a game. There is a two-way benefit to this process:
   - the new people are included;
   - the existing core team members have to be clear enough on their vision to communicate it.

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I. 2

4. There should be time and space built in for absorption of the vision, questioning it, or challenging it.

Reflection:

1. Do the new members understand the "what" of the vision? Do the new members understand the "why" of the vision.
2. How do you know this?

Mechanisms for Getting Input from New Members

Source: Judy Borree

COMMUNICATION 4

I. 2

Purpose:
- To elicit new members' ideas
- To support core team members as they launch the vision and prepare to have it adapted or changed by the metateam.

Time Required: 2-3 Hours

Resources Needed: Copies of the vision activities from Phase 1, "Developing Your Personal Vision"; newsprint, markers

Procedure:
1. Ask metateam members to complete the activity from Phase 1, "Developing Your Personal Vision."
2. Set up a process that allows for the sharing of their vision in a safe and supportive environment. For example, this could be sharing on a one-to-one basis between a new metateam member and a core member. The two would then partner to present the vision to the rest of the group.
3. Elements of the new members' visions that add to or conflict with the earlier vision are identified and explored for understanding. There need not be agreement at this point, rather clarification of meanings.

Reflection:
1. For new members, was there enough attention paid to trust and safety ?
2. Was there openness to understanding and difference?
3. Was the vision clear enough that the core members did not have to explain it to new members?

Culture & Conflict

Adapted with permission from Girard and Koch, *Conflict Resolution in the Schools.* Copyright 1996, Jossey-Bass, Inc. Publishers.

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COMMUNICATION
I.3

Purpose: To know your personal attitudes, beliefs, and behaviors related to conflict.
To understand the influence of culture on conflict behavior.

Time Required: 90 Minutes

Resources Needed: Copies of Culture and Conflict Questionnaire (see next page)

Procedure:

1. Review the definitions of *culture* in the Glossary. It may also be useful to review definitions of race and ethnicity and to show the relationship among the three terms. Team members may have some confusion about terms—culture, subculture, bicultural—and about the notion of primary and secondary cultural identifications. Since discussion of culture often triggers some anxiety, team members should remember that the purpose of this activity is to help develop personal understanding, not to judge ourselves or others.
2. Complete the questionnaire, which addresses personal ideas of cultural identity and cultural, family, and professional norms for expressing and resolving conflict.
3. Divide into small groups to discuss how team members think their culture affects their conflict behaviors. Do people from the same culture find similar effects?
4. In the large group, share insights and identify remaining questions about culture and conflict.

Culture and Conflict Questionnnaire

1. From what culture do you draw your primary identity?
2. Do you belong to other cultural groups that play significant roles in shaping who you are? List them here, but answer the rest of the questions from the point of view of your primary group.
3. In what ways has the group with which you have a primary identification been an asset to you?
4. Are there ways in which identification with your primary culture has created difficulties or problems for you? Describe them briefly. Do people make assumptions about your culture that positively or negatively affect you? What are they?
6. In what circumstances does your primary cultural identification create comfort for others?
7. In what circumstances does your primary cultural identification create discomfort for others?
8. What other cultures are you most comfortable with? Why?
9. With what other cultures are you least comfortable? Why?

For the next group of questions, please think back to a conflict you had with an individual or group with a different primary cultural identification.

10. In what ways did your approach to the conflict reflect the values, beliefs, or norms of your culture?
11. In what ways did your approach to the conflict depart from the values, beliefs, or norms of your primary culture?
12. In what ways did your approach to the conflict reflect the values and norms of your family beliefs?
13. In what ways did your approach to the conflict depart from the values and norms of your family beliefs?
14. In what ways did cultural differences affect how you approached the conflict?
15. What have you learned from conflicts with people from other cultural groups?
16. Are there some groups with whom you find communicating, in general, more comfortable? Are there some with whom you find communicating less comfortable? Descnbe briefly.

For the next three questions, please think about some recent conflicts at your educational institution.

17. What cultural groups are dominant at your institution? Which is dominant in terms of numbers? Which is dominant in terms of influence? At which levels?
18. How would you describe the culture of your institution?
19. What values or norms do you see reflected in recent conflicts at your institution?
20. What questions do you have about culture and conflict?

Adapted from Jim Halligan (Community Board Program, Inc.) and Marsha Peterzell (Wilson High School, San Francisco Unified School District), 1989, and from Kathryn Girard and Susan J. Koch, *Conflict Resolution in the Schools: A Manual for Educators*, 1996

Action Planning and Setting Realistic Goals

Source: Judy Borree

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COMMUNICATION

I.3

Purpose: To translate the goals and objectives of the vision into a plan for specific activities.

Time Required: 1-3 Hours

Resources Needed: Copies of your vision; newsprint and markers

Procedure:

1. As a team, analyze and re-word the vision into specific goals.
2. Review "What's Going On Here?" (Phase 3) to determine activities already planned or being implemented by other initiatives (use the Summary Feedback form).
3. Based on these goals, metateam members identify which of the goals they would like to focus or work on.
4. Each of the subteams then brainstorms strategies for addressing its specific goals (these may become objectives).

5 Subteams should then develop an action plan for achieving their specific goals and objectives. This action plan is shared with the entire group.

The action plan includes the following elements:

- target
- vision
- goals and objectives
- activities or interventions for each objective
- resources needed
- timelines

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COMMUNICATION

I.3

- support for team needed
- who will be responsible for each activity
- communications to existing initiatives (Who? How?)

6. Based on these action plans, the entire team should develop strategies for coordination, implementation, and sequencing of strategies and action.
7. Using the action plans, the entire team should construct an overall action plan. In doing so, consider these issues:
   - What is the timeframe for implementation?
   - In what sequence should activities be implemented, or does it matter?
   - What is achievable and realistic (within the established timeframe)?
   - What assessment criteria will be used to determine effectiveness, success, progress?
8. Determine measures and timelines for assessing efforts.

Reflection:

1. How were subgroups formed? What were the criteria used to determine who would work on what?
2. Why is it important to look at the overall plan?
3. As you reviewed the subgoals and respective action plans for each, did you notice a logical sequence of events? Why would it be important to consider sequence?
4. At what point will it be important to review goals, objectives, and strategies?
5. What structures have you put in place to report back the progress made toward meeting goals?

Responsibility Matrix

From *The Team Handbook for Educators.*

Purpose: To identify responsibilities necessary for accomplishing goals and to assign responsibility equitably and appropriately.

Time Required: 1 - 2 Hours

Resources Needed: Goals established by sub-teams, paper, markers, tape.

Even though team members may have an enormous commitment to an established vision, they can get burned out in the process of reaching the vision. Actions determined as necessary are often viewed as the sole responsibility of those on the committee. In order to build ownership beyond the metateam and also avoid team burn-out, it is often necessary to analyze the "responsibility" work load. This activity is designed to help in this process.

Procedure:

1. Using the Action Plans generated by the sub-teams, look carefully at the strategies developed to meet the goals and objectives.
2. What are the tasks associated with each? For example, some of the responsibilities associated with conducting committee meetings include:
   notifying committee members of meeting specifics;
   setting up the meeting room;
   cleaning up after the meeting is over;
   taking minutes;
   facilitating meeting;

helping team when it is stuck;
arranging refreshments, materials, and resources, if necessary;
keeping track of member concerns;
keeping team members on task;
being aware of conflicts and making the effort to resolve or address.

3. Using the Responsibility Matrix, identify who will be responsible for each of the tasks the subteams identified within their Action Plan. It may be helpful to think about the system as a whole. Are there programs or initiatives currently operating in the system that could be helpful in implementing these strategies or activities? Would they be the appropriate groups to assume responsibility?
4. After you have completed the Responsibility Matrix and determined that others within the system will be responsibile for carrying out some of the actions/activities/strategies necessary to reaching the vision, consider what information you need from them.
5. Design a "Keeping In Touch" form that can be used to collect pertinent information. (For example, you might want to know how a particular committee shared information, what the outcome of that sharing was, and with whom they shared.

Reflective Questions:

1. In completing this matrix, did responsibility seem to be spread more equitably among committee members and members of the system at-large?
2. What strategies or activities had many more tasks necessary to its implementation than were initially apparent? If you had not done the task analysis, what might have been the outcome if one person had assumed responsibility for the whole task?
3. How does sharing responsibility encourage ownership?
4. Why is it important to recognize and acknowledge other programs and initiatives as stakeholders in your vision?

Responsibility Matrix

TASK	WHO Please include individual name(s)		
	Team members	Members of the system at large	Others (community, administration, other program participants, committees)

Writing a Contract

Source: J. Borree

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COMMUNICATION

I.4

Purpose:

- To arrive at a contract between the action team and the relevant elements of the target system.
- To provide tangible evidence of commitment.

Time Required: 1 Hour

Resources Needed: Paper, pens

Procedure:

1. For each intervention strategy, a contract should be negotiated and written (See possible format on following pages). This provides everyone with both a guide to and a record of what the team's activities and intentions are.
2. Someone involved in the action or intervention fills out the necesssary information.
3. The team reviews the suggested contract and offers suggestions and consultation.
4. One person is designated to contact the relevant participants and present the contract. Again, the team consults and offers support.
5. Copies of the contract, with necessary signatures, are on file before the intervention strategy is implemented.
6. Contracts are used for review, consultation, and evaluation of outcomes.

Reflection:

1. Did you find it difficult to get the larger system to commit to your interventions? If so, why might this be? What can be done to counteract this reluctance?
2. Did you find the contract a useful document to help the team advance?

Contract

Team Name:________________

Date written:________	Date agreed to:________	Date completed: ________

Team members involved:	System members involved:

Intervention Strategy Description of activity/intervention addressed by this contract:

Resources needed:	To be provided by: (source)	Timeline:

Goals/Objectives/ Hoped-for Outcomes:	Projected Review Dates:	Means of Assessing:

Signatures of those critically involved (includes adminstration) :

______________________________ ______________________________

______________________________ ______________________________

STOP TO ANSWER THESE QUESTIONS

It is assumed that you are no longer investing all of your energies in team meetings, but, instead, are busy implementing strategies to realize your vision. As you do this, keep a record of your progress by answering the following questions. **It may be helpful to keep a journal of your efforts and activities as well.** Each of these will help you maintain your commitment and benchmark your progress.

1. What are you doing to implement your plans and ultimately realize the vision?
2. Who is involved?
3. With whom did you talk? How did it go?
4. What have been the challenges to implementation (attitudes, time, resources)? What have you done to address these challenges?
5. Have you discovered connections to other school initiatives? What is the relationship to the vision? If there is a relationship, have you established links, connections, or a common purpose or goals?
6. What type of feedback or documentation have you developed, provided, and asked of others whose work has a relationship to yours? Why would you want this information from them? How will it be helpful to you?

IMPLEMENTING THE PLAN

"Just do it!"

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Recipe for a Successful Team

From *The Team Handbook for Educators.*

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COMMITMENT

II.2

Time Required: 45 minutes

Resources Needed: *Recipe for a Successful Team,* Supplemental Materials; attached checklist

Purpose: Because every team rides a roller coaster of highs and lows, teams can be more successful if they recognize the cycle and accept it with patience, or sometimes, with resignation. This review of the Ten Essential Ingredients for a Successful Team will help your team overcome the negatives and prevent typical group problems.

Procedure:

1. Review the description of each of the ten essential ingredients for a successful team, found in the Supplemental Materials.

2. Using the checklist on the following page, individually check the ingredients you believe your team is using at this point in your work.

3. Compare individual results as a team, either by verbal sharing or designing a large tabulation sheet on newsprint. Discuss differences and similarities.

4. Compare results with results for the same activity in Phase 2.

"Every team goes through cycles of good times and bad times. The duration of these highs and lows will vary for each team, depending on how quickly they progress, work through obstacles or problems. Team members should know that such cyles are normal and do not indicate whether the team will ultimately be successful."

—*The Team Handbook for Educators*, pp 6-8

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COMMITMENT

II.2

Reflection:

1. How did the group's results compare internally?
2. How did the group's results compare to the results in Phase 2?
3. Are the results in Phase 4 the same as in Phase 2? Different? Better?
4. How did adding new members to the team enrich your team?

Ten Ingredients for a Successful Team

Instructions. Use this list with the preceding activity. First, review the description of each of the ten ingredients for a successful team, found in the Supplemental Materials. Then, as an individual, read this list and place a check next to each item you feel the team has achieved. Last, compare your results with those of the rest of the team and compare those results with those completed in the same activity in Phase 2. Review and respond to the Reflection Questions.

	1. Clarity in team goals
	2. An improvement plan
	3. Clearly defined roles
	4. Clear communication
	5. Beneficial team behaviors
	6. Well-defined decision procedures
	7. Balanced participation
	8. Established ground rules
	9. Awareness of group processes
	10. Use of the scientific approach

Guidelines for Constructive Feedback

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COMMITMENT

II.2

Purpose:
- To recognize constructive feedback.
- To develop and practice the skill of constructive feedback.

Time Required: 30 to 60 Minutes

Resources Needed: *Guidelines for Constructive Feedback* (See Supplemental Materials)

Procedure:
1. Read *Guidelines for Constructive Feedback.*
2. In small groups, develop role-play situations that can be used to practice the skills outlined in the Guidelines.

Reflection:
1. In what situations will this be useful to you?
2. What type of feedback are you, as an individual, most receptive to? What puts you on the defensive?
3. Since practicing these skills, have you noticed others using them in team meetings? Other situations? Have the interactions been different as a result?

Meeting Skills Checklist

From *The Team Handbook for Educators.*

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COMMITMENT

II.2

Purpose: Having team members evaluate their meeting skills is a good alternative to evaluating the meeting itself. Use this exercise after the team has met four or five times and has begun to establish patterns and routines of behavior. Team members can also use this checklist on their own as they work to improve the skills each is weakest in.

Time Required: 30 to 45 Minutes

Resources Needed: Checklist Grid (foloowing this activity, or one of your own making)

Procedure:

1. Preparation. Make enough copies of the "Meeting Skills Checklist" (following pages) to distribute to the team. On a flipchart, draw 22 rows and 4 columns. Label the columns "Behavior," "Never," "Occasionally," and "Often," in sequence. Number each row and copy key words from the corresponding sentences provided (unless you want to copy the entire sentence).
2. Fill out forms. Hand out copies of the checklist and have each member individually complete one.
3. Compile answers. Transfer individual ratings to the previously prepared flipchart. Have each member enter a checklist, or initials, on the line under the appropriate column.

4. Discuss answers. Any surprises? Which areas seem to be weakest? What can you do to help yourselves and each other? Should you do this in the future to see whether there is a shift? When?

Reflection:

1. Did this exercise help you evaluate your skills and where you needed to develop more productive ones?
2. Did everyone take part?

Meeting Skills Checklist

Instructions: Either copy this page and the next page, or create your own version. Have team members work through it, first individually, then as a team.

Behavior	**Never**	**Occasion-ally**	**Often**
1. I suggest a procedure for the group to follow, or a method for organizing the task.			
2. I suggest a new idea, new activity, new problem, or a new course of action.			
3. I attempt to bring the group back to the agenda when joking, personal stories, or irrelevant talk go on too long.			
4. I suggest, when there is some confusion, that the group make an outline or otherwise organize a plan for completing the activity.			
5. I initiate attempts to redefine goals, problems, or outcomes when these become hazy or confusing.			
6. I elaborate on issues with concise examples, illustrations.			
7. I suggest resource people to contact and bring in materials.			
8. I present the reasons behind my opinions.			
9. I ask others for information and/or opinions.			
10. I ask for the significance and/or implications of facts and opinions.			
11. I see and point out relationships between facts and opinions.			
12. I ask a speaker to explain the reasoning or what tools were used to lead him or her to a particular conclusion.			

Meeting Skills Checklist, continued

Behavior	Never	Occasion-ally	Often
13. I relate my comments to previous contributions.			
14. I pull together and summarize various ideas presented.			
15. I test to see if everyone agrees with, or understands, the issue being discussed, or the decision being made.			
16. I summarize the progress the group has made.			
17. I encourage other members to participate and try to unobtrusively involve quiet members.			
18. I actively support others when I think their point of view is important.			
19. I try to find areas of agreement in conflicting points of view and try to address the cause of the problem (e.g., "How could we change our solution so that you could support it?" or "It sounds to me as if we all agree on X, Y, and Z.").			
20. I use appropriate humor to reduce tension in the group.			
21. I listen attentively to others' ideas and contributions.			
22. I use appropriate technology.			

The Works

Source: J. Borree

COLLABORATION

II.3

Purpose: To devise ways to extend support and input/advice.
To make course corrections when/if necessary.
To procure resources as needed.
To adjust workload as needed.

Time Required: 1/2 to 2 Hours as needed

Resources Needed: Someone to record decisions
Copies of the Goals (developed in Action Planning and Setting Realistic Goals, Objective I.3) and Contract (in Writing a Contract Activity, Objective I.4)

Procedure:

As a team, address the following issues:

1. What are the on-going needs for support and input of the team(s) as you implement your plan?
2. Brainstorm ways of addressing these needs--i.e., whole team meetings, subgroup meetings, telephone/e-mail conferences, etc.
3. Decide on an on-going system for these purposes.
4. Designate responsibilities for convening, initiating, notifying, etc.
5. Design a checklist for seeing that major needs/concerns are addressed. For example:
   - reporting progress/checking in
   - Morale Readout
   - Resources/supply inventory
   - Coups and glitches
   - Vision visit
   - Mental health check
   - Next steps

C-Links

Source: J. Borree

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COLLABORATION

II.3

Purpose: To diffuse information regarding the work and achievement of the team.
To enlist support in the system for efforts of the team.

Time Required: 1-2 Hours

Resources Needed: Member Mapping Chart, newsprint, flipcharts, pens

Procedure:

1. On the Member Mapping Chart created in a previous activity (Objective I.1, Phase 4), use a new color to identify the formal and informal information dissemination channels in the system.
2. Identify strategic sources, receptors, and disseminators.
3. Brainstorm various means of conveying on-going information about the team's work to these sources—i.e., newsletter, phone tree, presentations, billboards, posters, coffees, memos, etc., that might best address the characteristics of the intended receivers.
4. Develop a PR plan that includes guidance as to who/what/when/how communication should happen. Designate person(s) on the team to take primary responsibility for implementing the plan.
5. Set up a procedure for clearing communications to the larger system through this person.

Evaluation:

1. Is someone functioning as a clearing place for outgoing communications about the project?
2. Is there a system for diffusing information using formal and informal channels?