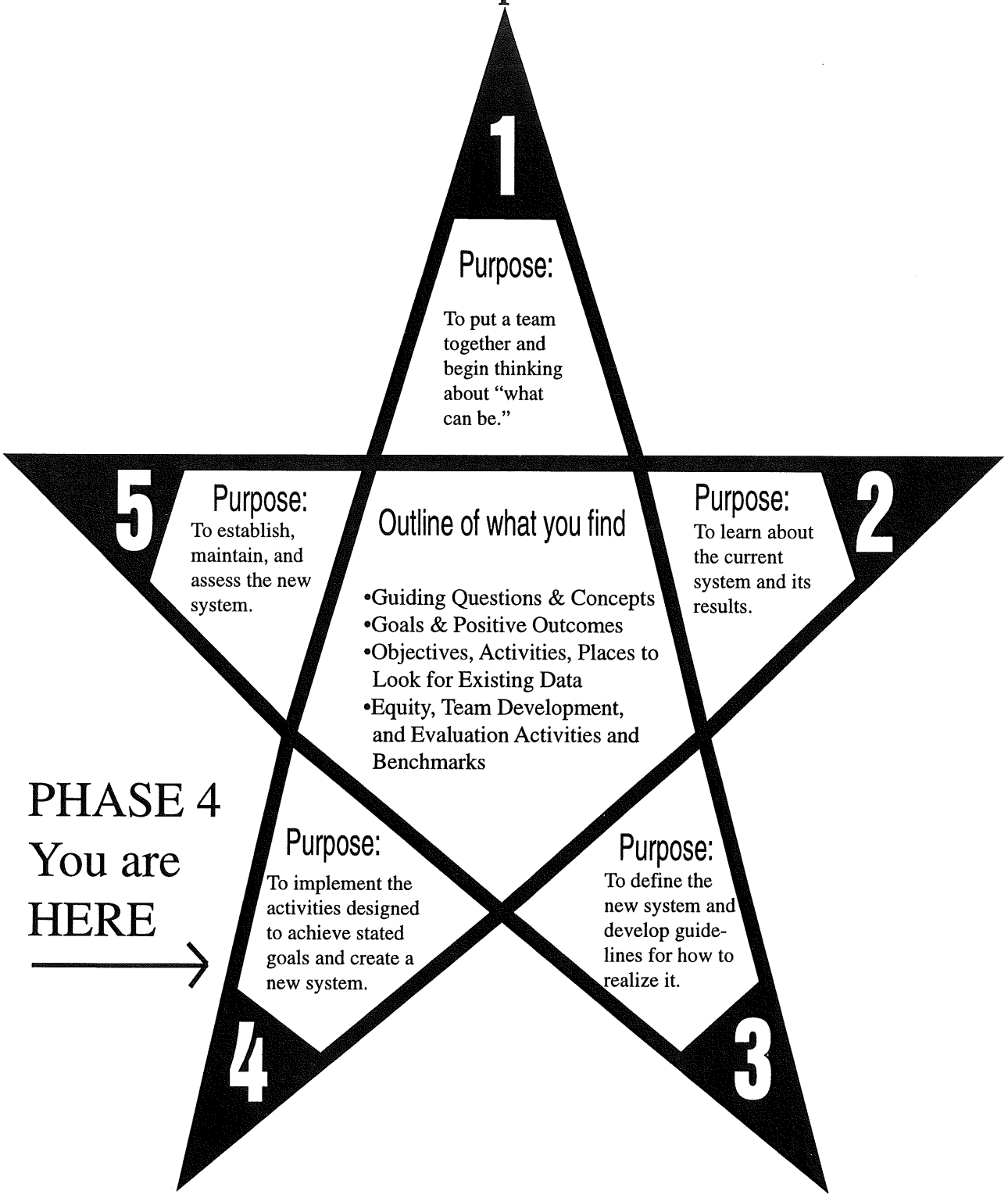
Phase 4
Expanding Partnerships
and
Implementing the Plan

AN OVERVIEW
of the phases



Phase 4 : Expanding Partnerships and Implementing the Plan

Phase 4

You have come a long way and completed a lot of work. You have created a safe environment within your team for both dreaming of possibilities and seeing hard realities. You have taken the risk of putting your best ideas into solid form by making a plan. The next step is the delicate and demanding work of exporting that vision to the larger community. Expect to spend more time working outside the team, but remember to continue to nurture and support the trust and progress within the team.

Introduction

Nature metaphor revisited

As we noted earlier, nature embraces change, calls for new forms and organization constantly. It is the nature of nature to be in the process of evolution and development. In nature, new forms emerge in many ways, through many processes. Some are quiet and inconspicuous, like the creation of soil on the forest floor or the sprouting of seed in the spring. Some are violent and flashy like volcanoes or star births. But all show the permeability of the fabric of reality. There are places and avenues for change in what appears to be a seamless, intact scene. It is the work of implementation to approach this picture with reverence, to begin the process of change with the delicacy and strength of purpose of giving birth. And like birth, implementing a change plan requires determination and patience, hard work and attention to detail, great strength and willingness to trust and let go. It demands forging a partnership between the changer and the to-be-changed. It needs open and trusting communication. And, above all, it requires commitment on the part of all participants to the process and to a vision of the future.

Phase 4 of this process, implementing the plan, may require that the original team expand to accomplish its goals. If so, the team must be prepared to export and sell its vision, to recreate itself on a larger scale, and allow new energy and ideas into the vision and the plan. It requires the team both to hold and to release the vision as it was developed, allowing the vision to be reworked to fit the larger context, trusting that what will finally be born will be best for the school system and the target system for the moment.

GUIDING QUESTIONS

Guiding Questions

Again, these questions are designed to remind you that equity and diversity are to be a focus of every educational initiative. They are reflective questions that will help you improve education in your school, while taking individual student needs into account. Find your team's answers to these questions.

- What would get you to sign on to being a part of a change?

  Think about what your process has been in getting involved, becoming a believer in this project. What made you feel like an insider? Like an outsider? When you join a new group, what makes you feel like you belong, like you want to belong?

- What gives credibility to an idea that will have an impact on your "world" or "system"?

  Every environment is bombarded with new ideas, information, initiatives. Some come with high recommendations from current experts and gurus. Is that enough to create an openness to change in your world? If there are data on the success of an idea in a similar setting, does that insure acceptance? If a suggested change has a ring of truth and common sense to it, does that make a difference? What role does money play in making change possible and acceptable?

GUIDING QUESTIONS

- What essential attributes of change are required for your goals to be seriously or enthusiastically embraced in your setting?

- Who should be involved in this effort?

  Are there key people who must be involved in order for the change to be adopted in a meaningful way? Who will have the most influence or be listened to most readily in your environment? Every system has a formal and an informal leadership structure. Every issue has strategic adherents and opponents. A good plan will address the concerns and possible resistances of the major factions that will be affected by the change. One way to address these elements is to involve those who represent alternative views in the process.

- What are the components of good partnership?

  How will you, the team, make this process inviting to other people, especially to historically underrepresented, underserved populations? What in the plan might prevent them from becoming involved? How can people be involved in various ways, along a continuum of contribution? How can you share ownership of the vision and the change process?

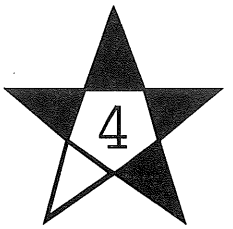
- What kinds of communication links do you need to the larger environment?

  Who needs to know what? What does EVERYONE need to know? What various ways/methods of communication might connect with various populations, especially historically underrepresented, underserved students, parents, groups, committees?

- How will you support and nurture momentum and involvement in the change plan?

  Have you defined realistic goals? Timelines? Measurements of movement? What do you need for this project to succeed? Will you welcome new input?

Concepts



Communication

COMMUNICATION

Communication is an exchange process that transcends the mechanics of talking and listening. It is so critical to the success of any endeavor that it seems almost trite to address it. And yet, it is so basic that it is often disastrously overlooked. Open, forthright communication fosters and builds trust and invites participation. Articulating the vision in ways that elicit further creativity can draw new energy to the process. People who sense this kind of openness to input are likely to offer their ideas, their resources, and possibly their time. No plan is so good that it cannot benefit from additional input. To share the vision with the knowledge that it can still be improved upon is one of the tasks of Phase 4.

Commitment

COMMITMENT

Getting a commitment from others to support, participate in, and implement the plan is the outcome of the communication process. It involves a stated and acted-upon belief in the vision and plan. It involves putting resources, time, and energy into the process. It is signing on and showing up.

Collaboration

COLLABORATION

Arthur Himmelman outlines a four-level organizational model for collaboration. He defines the levels as (1) communication—exchanging information for mutual benefit; (2) cooperation—exchanging information and sharing resources to achieve a common goal; (3) coordination—exchanging information, sharing resources, and altering activities for mutual benefit and to achieve a common goal; and, (4) collaboration—exchanging information, sharing resources, altering activities, and enhancing the capacity

of a partner for mutual benefit and to achieve a common goal. It is this process of forging true partnership in the change process that we are aiming for in Phase 4. In a sense, it is a merger, a turning over of the vision and the impetus you have created to a larger process that will insure that the idea and the change will take hold in the larger system.

GOALS AND OBJECTIVES

(The activities listed in this section are included in their entirety. You will find the complete activities after the Summary Chart.)

BUILD TRUST: TEAM & SYSTEM

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 both 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

Meta: "1) denoting a change of position or condition; 2) of a higher or second-order kind."
—Oxford Encyclopedic English Dictionary

Goal I. To build trust, commitment, and collaboration between the team and the system that will be affected.

Positive Outcomes:

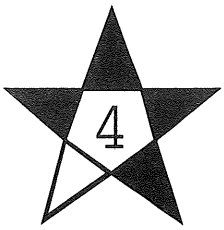
- A more trusting atmosphere is established throughout the system.
- A merged vision is achieved and communicated.
- The team feels responsible and accountable for achievement of the new vision.
- A *metateam* is established to carry out the plan.

In this case, *metateam* indicates a second-order team established to reach farther than the original team would be able to.

Objective I.1. To identify and develop a metateam.

Activity: Member Mapping
Activity: Selecting An Expanded Team
Activity: Strategies for Enlisting New Members

Evaluation:	The team has identified a group of potential new members. The new members have been invited to participate and have been given information about the project. There is a committed group that includes new members.
Objective I.2.	To share the vision and/or arrive at a merged vision
Activity:	Show & Tell the Vision
Activity	Mechanisms for Getting Input From New Members
Evaluation:	The core team has shared with the metateam the vision it developed in Phase 1, with the metateam, and the vision is changed, if necessary, so that all agree on its principles.
Objective I.3 .	To engage the larger system in the change process by establishing very realistic goals.
Activity:	Culture & Conflict
Activity:	Action Planning and Setting Realistic Goals
Evaluation:	Very reasonable goals are clear, realistic, measurable, and relate to your vision and plan
Objective I.4.	To mutually agree on responsibilities, resources, timelines, activities; to develop a contract
Activity 1:	Responsibility Matrix
Activity 2:	Writing a Contract



Evaluation: The new team has a matrix, a contract that team members have signed as a symbol of their commitment, and you are starting to implement the plan.

GOAL II: To implement the plan as informed by the merged vision and articulated in a written contract.

Positive Outcomes:

- Positive forward progress.
- Energized activity that includes more people, especially historically underrepresented, underserved students, parents, and communities.
- Greater awareness and acceptance of diversity in the system.
- A more accepting and supportive environment for everyone.
- A community environment committed to educating all of our children.

Objective II.1. To implement the plan.

Activity: Stop to Answer These Questions

Evaluation: Questions are answered to team's satisfaction.

Objective II.2. To establish team processes for nurturing and supporting change efforts.

Do this!
It is critical!

Activity: Recipe for a Successful Team
Activity: Guidelines for Constructive Feedback
Activity: Meeting Skills Checklist

Evaluation: Members of the metateam knows where and how to find the skills needed to work well together. When operating problems

come up, team members call on those skills and on each other, often referring back for review to a previous activity that teaches needed skills.

Objective II.3. To put in place and implement mechanisms for monitoring and guiding work progress.

Activity: The Works
Activity: C-Links

Evaluation: Members of the team have developed ways to change direction if needed. They implement methods for assuring that the workload will be balanced among members and that members will have resources to do assigned/chosen work. A person, or persons, will function as a clearinghouse for outgoing communications about the project

Goal II: To implement the plan as informed by the merged vision and articulated in the contract.

Positive Outcomes:

- Positive forward progress.
- Energized activity that includes more people, especially historically underrepresented, underserved students, parents, and communities.
- Greater awareness and acceptance in the system of diversity.
- A more accepting and supportive environment for everyone
- A community committed to educating all of our children.

Objectives:	Activities:	Evaluation
II.1 To implement the plan.	**STOP TO ANSWER THESE QUESTIONS**	**Questions are answered to team's satisfaction.**
II.2 To establish team processes for nurturing and supporting change efforts.	• Recipe for a Successful Team • Guidelines for Constructive Feedback • Meeting Skills Checklist	The metateam knows where and how to find the skills needed to work well together. When operating problems come up, team members call on those skills and on each other, often referring back for review to a previous activity that teaches needed skills.
II.3 To put in place and implement mechanisms for monitoring and guiding work progress.	•The Works • C-Links	Members of the team have developed ways to change direction if needed. They implement methods for assuring that the workload will be balanced and that members have resources.

Before You Move On . . .

Reflective Questions

- Did these objectives assist you in moving the plan forward?
  What kind of results did you get?
  What worked, what did not work?

- Did these objectives help you connect with and get commitment from others in the larger system?
  What kind of results did you get?
  What worked, what didn't work?

- Did you meet any personal goals?

- In what ways has your knowledge about culture, diversity, and equity in a system changed? What issues are you more aware of regarding equity and culture?

- Review the Guiding Questions. Do you want to add to your responses?

- Are you ready for the next phase?