Collaborating for Student Success

The Collaborator's

TOOLKIT

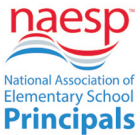PREPARE   ACT   REFLECT

National
Labor Management
Partnership

AASA
THE SCHOOL SUPERINTENDENTS ASSOCIATION

aft
A Union of Professionals

CCSSO
Council of Chief State School Officers

naesp
National Association of
Elementary School
Principals

NASSP
National Association
of Secondary School Principals

nea NATIONAL
EDUCATION
ASSOCIATION

nsba
National **School Boards** Association

Using This Toolkit

This Toolkit is a compilation of the activities in the National Labor Management Partnership's *Collaborating for Student Success Guidebook*. It is intended for labor-management collaboration practitioners who are using the guidebook to develop their partnership, by facilitators/trainers, and for those enrolled in the National Education Association's *Collaborating for Student Success* online learning course. You can download the guidebook here: [Guidebook](#) and access the online learning course here: [nea.org/collabcourse](#).

This Toolkit contains two types of activities: Consider & Discuss and Tools. The Consider & Discuss activities are prompts intended to help practitioners reflect on and internalize how the guidebook and course learning connects to their unique situation. If you're starting your journey as an individual, without collaborative partners or a collaborative team, you can use these activities for individual reflection.

When working with partners, we recommend that each person reflect on the prompts individually, then discuss their individual responses as a team. These discussions help team members understand others' perspectives and help the team prepare to jointly complete the tools. We recommend that you record a "team" answer to each Consider & Discuss prompt to capture and summarize the group's discussion.

Tools are activities intended to lead practitioners through the steps of forming their partnership and undertaking a collaborative project. As such, they are (with the exceptions of Chapters 1 and 2) meant to be completed by partners working together and completing a "team" version of each tool.

To get the most out of the two activity types, we recommend that each individual download their own copy of the Toolkit to record individual Consider & Discuss responses as well as individual thoughts on the tools, AND a team copy of the Toolkit to record the work of the team as a whole. You may want to keep the team copy in an easily accessible location, such as a shared drive, Microsoft Teams, or similar platform, so that all team members can access and contribute to the team's work.

Contents

Learn the Case for Collaboration

Learn the Case for Collaboration	Identify Partners & Discover Shared Goals	Commit to Collaborate

Consider & Discuss: Sharing the Case

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. If you already have some potential partners, discuss your individual responses as a group.

Which aspects of collaboration are most compelling to you?

_____

_____

_____

_____

What might be most compelling to your own stakeholders and to others in your system?

_____

_____

_____

How might you share the case with each of these groups, and what resources will you use?

_____

_____

_____

_____

1B: Sharing the Case for Collaboration With Others

PURPOSE

This worksheet can help you create a comprehensive plan of action for sharing the case for collaboration with others. First, you'll brainstorm, then you'll create in-reach and outreach plans based on your brainstorming ideas.

STEP 1: Brainstorm

Consider the following questions and jot down your responses. Your answers will help you formulate a plan to share the case for collaboration.

What makes me most excited about the possibilities of collaboration in my school/district?

_____

_____

_____

_____

How and when will I tell my own stakeholder group (e.g., educators, administrators, etc.) about the case for collaboration?

_____

_____

_____

_____

_____

1B: Sharing the Case for Collaboration With Others (cont'd)

STEP 1: Brainstorm (cont'd)

With which other stakeholders in my school/district will I share the case for collaboration?

_____

_____

_____

_____

_____

_____

_____

Which resources will I use?

Collaboration case studies

Pamphlet on collaborative partnerships

Collaboration infographic

Call to action

Others such as...

_____

_____

_____

_____

_____

_____

STEP 2: In-Reach Plan of Action
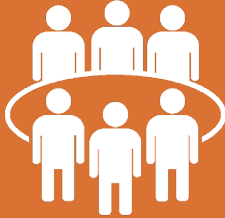
Fill in the table below to create a plan to share the case for collaboration with **members of your own stake-holder group** and ask them to join you in collaborating with other stakeholders in your education system around shared student-centered goals.

Individuals and Groups/ Caucuses Within My Stakeholder Group	What aspects of the case for collaboration will be most compelling to them?	Target Date	Method of Approach	Notes

STEP 3: Outreach Plan of Action

Use the table below to define your plan for sharing the case for collaboration with other stakeholders in your system.

Stake-holder Group	Specific Person(s)	Issue Most Compelling to Them	Target Date	Method of Approach	Notes
Education Association/Union					
District Administration					
Principal(s)					

STEP 3: Outreach Plan of Action (cont'd)

Stakeholder Group	Specific Person(s)	Issue Most Compelling to Them	Target Date	Method of Approach	Notes
School Board					
Parents					
Community Organizations					
Other					

Chapter 2:

Identify Partners

| Learn the Case for Collaboration | Identify Partners & Discover Shared Goals | Commit to Collaborate |

Consider & Discuss: Relational Trust

2A

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. If you already have some potential partners, discuss your individual responses as a group.

Thinking about myself and my own stakeholder group, how have I or we demonstrated the five components of relations trust (benevolence, reliability, competence, honesty, openness) to other education stakeholders?

_____

_____

_____

_____

_____

How could I or we become a partner more worthy of others' trust, especially on issues where there is disagreement?

_____

_____

_____

_____

Who in my system has a reputation for being trustworthy?

_____

_____

_____

_____

_____

Consider & Discuss:
Identifying Potential Partners

2B

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. If you already have some potential partners, discuss your individual responses as a group.

Who are the stakeholders in my system, and what roles might they play in a collaborative partnership?

_____

_____

_____

How would I characterize the existing relationships among stakeholder groups in my system?

_____

_____

_____

_____

What school improvement issues do I care about, and who else in my system might be willing to work on them?

_____

_____

_____

Have I previously worked with a partner to address education-related issues? What other existing relationships might I build on?

_____

_____

_____

_____

2C: Potential Partner Brainstorm Template
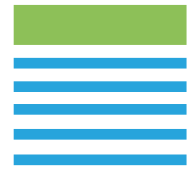
PURPOSE

This tool can help you identify the other stakeholders in your system and consider the strength of your relationships with them, for the purpose of selecting potential partners for collaboration.

STEP 1

Use the list below of common stakeholder groups to start your brainstorming. Who do you know in these groups and others that may be partners in your collaborative work?

Stakeholder Groups

Administration

Association/Union

Universities, Non-Profits

Student Groups

Parents & Community Groups

School Boards

STEP 2

Once you've identified your potential partners, consider the strength of those relationships, and sort them accordingly. With whom do you already have strong relationships, and with whom do you need better relationships?

Have Strong Relationships

Need Better Relationships

2D: Relationship Continuum Self–Assessment

PURPOSE

This tool can help you consider the nature of your working relationships and understand how you might work to improve them, so that they fall into the "Cooperative" or "Partner" category.

INSTRUCTIONS

1. Consider the stakeholders in your system, and assess your relationship with them using the continuum. Where do you believe the relationships fall? Place your answers in the first two columns of the table on the next page.

2. As your collaboration progresses, consider which characteristics you and your partners need to attend to in order to move towards Cooperative and Partner. Brainstorm ways that you might strengthen your relationship and put your thoughts in the last column of the table.

Very Adversarial	Adversarial	Traditional	Cooperative	Partner
• Hostile environment • Slowdowns • Legal challenges • Strikes/lockouts • "Work to rule"	• Lack of trust • Poor communication • Rigid, legalistic interactions • "Gotcha" mentality • Use of power and rights whenever possible • Win/lose attitude	• Moderate level of trust and credibility • Sharing of some information • Union leaders have some knowledge of district issues • Administration understands union's history and mission • Some joint efforts, but mostly reactive problem-solving	• Open sharing of much information • High level of trust and credibility • Leaders of stakeholder groups see the need for collaboration • Awareness of mutual goals • Few grievances or arbitrations • Mechanisms for educators' voices to be heard • Anticipatory problem-solving	• Shared vision, goals, and action plans • Presence of collaborative teams at all levels • Educators share in many decisions • Joint problem-solving fixes most problems; fighting is rare • "We won't let each other fail" mentality

Adapted from 1199 SEIU/League
Labor Management Project (2018).
labormanagementinitiatives.org/why-partner/

2D: Relationship Continuum Self-Assessment (cont'd)

Potential Partner	Current Relationship Continuum	How to Strengthen

2E: Extending the Invitation

This tool can help you invite stakeholders to collaborate with you.

STEP 1: Who to Invite
In this step, you'll think about **who** you'll invite, and **what** you're inviting them to.

For your first invitation, it makes sense to select someone with whom you already have a good working relationship, or someone you think would be open to collaboration based on their reputation or on observation of how they work and interact with others.

Initial Invitee: _____

Consider your invitee's position in the district or school, their internal stakeholders, and the groups they report to. What do they care about? What will resonate most with them? Is there a specific issue or problem taking a lot of their attention right now? Next, gather specific, relevant data or examples of an issue of importance that you can use to either grab their attention or to support your ask. Think about your invitee – are they more likely to respond to hard data, or to a story about another school or district?

Issue of importance: _____

Relevant resources:

_____
_____
_____
_____
_____

Next, define the desired result of the conversation. In a perfect world, what would be the outcome of this conversation? What are you inviting them to do? What do you envision the next step being?

Desired outcome: _____
_____

2E: Extending the Invitation (cont'd)

STEP 2: Draft Your Invitation
Choose an invitation style, review the sample invitations, and use the template to draft your invitation.

Regardless of who you're talking with or the topic, your invitation should begin with a strong opener that grabs your listener's attention and makes a connection to their interests. Your invitation should end with a specific request to take the next step towards a collaborative partnership. Base the request on your desired result from Step 1.

Use your own natural speaking style and vocabulary, and remember to keep your invitee and their interests in mind. To what information and style are they likely to respond favorably?

Invitations can take various forms, depending on your objective, your personal style, who you're talking with, and the issue at hand. The styles are not radically different, but one may feel more applicable or more natural than another.

Invitation Styles:
1. Problem/Solution:
   - Strong opener: articulate the problem or pain point
   - Present a potential solution
   - Request to take next step

2. Join Me!
   - Strong opener: statement of excitement or question
   - Supporting information
   - Request to take next step

3. Tell a Story:
   - Strong opener: our present state (what is the critical issue, what are the stakes)
   - The problem (potential consequences, what happens if we take no action?)
   - What we can do about it/potential solution
   - Request to take next step

4. Compare/Contrast:
   - Strong opener: present compelling future vision
   - Contrast with present situation
   - Present how we might get to future vision
   - Request to take next step

5. Monroe's Motivated Sequence: (Various examples and templates can be found online.)
   - Attention (strong opener)
   - Need (state the problem or need)
   - Satisfaction (outline a solution)
   - Visualization (tell them how they'll benefit from your solution)
   - Action (request to take next step)

Invitation Template

Invitee:
_____

Issue I know this person cares about:
_____

Desired outcome:
_____

Invitation style:
_____

Strong opener:
_____
_____
_____

Other elements of your selected invitation style:

Element:	Your text:

Request to take the next step:
_____
_____

Also refer to the sample invitations on the next page.

Example 1: Join Me! Style, Using Data

Have you seen the national *Call to Action* for education partnerships? The educators', principals', superintendents', and school boards' associations are jointly encouraging their members across the nation to work together on student-centered goals, like language arts proficiency. There's research that shows schools and districts robustly using these partnerships average twelve-and-half percent more students performing at or above grade level in English language arts, as well as other benefits. I'll send you a copy of the information. I think we could work together to really make a difference. Can we sit down next week to talk in more detail?

Example 2: Compare/Contrast Style, Using a Story

Imagine being able to report a twelve-and-half percent increase in student language arts performance! We both know this has been an ongoing and stubborn problem for us. I just watched a video about a high school in Illinois that was facing some of our same problems, and they've been able to make tremendous headway by using education partnerships to overcome some of their toughest challenges. I'll send you the link. If you're interested, I think we could make some real progress by working together. Can we sit down next week to talk in more detail?

Discover Shared Goals

Learn the Case for Collaboration	Identify Partners & Discover Shared Goals	Commit to Collaborate

Consider & Discuss:
Potential Shared Interests

3A

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What information do we already have about the topic(s) of shared interest?

_____

_____

_____

What data sources do we have for that information?

_____

_____

_____

What additional information would help clarify the problem we're trying to solve, or the needs of those we're hoping to impact?

_____

_____

_____

Which stakeholder groups is it important that we hear from on this topic?

_____

_____

What methods might we use to gather the information we need?

_____

_____

_____

3B: Discovering Shared Goals
Planning Template

PURPOSE

This tool helps identify areas of interest for you and your partners to address collaboratively. It is a short questionnaire for partners, staff, and/or parents to identify common interests. Use the results to help your team formulate broad shared goals.

INSTRUCTIONS

Review the items below and answer them as a group using the table on the following pages to record your discussion.

Make a list of the issues that stakeholders in your system care about. Issues might be district-level or school level. (For example: literacy retention, collaborative climate, etc.)

What data are available to help you know how impactful these issues are in your system? For each issue, list data that may already exist to help you better understand it.

For example, if "retaining new teachers is an issue in your district, the district likely has data on the numbers of new teachers hired each year, their placement, how many receive mentoring or other professional supports, the percentage of teachers who remain in the district after several years, etc.

How do we decide what to address first? Rank the issues you listed, based on the considerations below (as well as other considerations you deem important for your context). You may need to revisit this initial ranking after further data collection, but for now, assign an initial ranking.
- How important is the issue to stakeholders?
- What impacts does the issue have on students?
- What is the level of effort needed to complete the task?
- Who is willing to participate in addressing the issue?
- How much time do you have to work on the issue?

3B: Discovering Shared Goals Planning Template (cont'd)

Issue	Data	Where does this rank and why?

3C: NEA's Opportunity Checklist

PURPOSE

This tool helps identify areas of interest for you and your partners to address collaboratively. It is a short questionnaire for staff and/or parents to collect data to identify common interests. Use the results to help your team formulate shared goals and begin the work.

INSTRUCTIONS

Do students and educators at your school have everything they need? If not, this is your opportunity to speak up! On the lists below and on the following pages, place a checkmark next to the top areas where school needs to improve.

To take advantage of the association's/union's natural network, building representatives can be responsible for distributing and collecting the checklists, and compiling data for each school. Building representatives can report the results to their principal and/or School Leadership Team, and to the education association's/union's executive board, who can then compile district-level data and share educators' most pressing concerns with district administrators and other stakeholders.

NOTE: Complete this form online at: pages.email.nea.org/your-school-checklist. Completing the form online allows for follow-up from NEA with additional resources.

Community: It's important that your school is open to the community it serves.

- [ ] A welcoming front office
- [ ] Active community involvement (parent support groups, and a community liaison, for example)
- [ ] Materials available in the languages the school serves

Healthy Students in Modern Schools: Students need their essential human needs met, and to be in a healthy learning environment that is clean and in good working order.

- [ ] Healthy meals
- [ ] School nurse
- [ ] School counselor

3C: NEA's Opportunity Checklist (cont'd)

- ☐ A roof that is free of leaks
- ☐ Healthy indoor air quality (free of mold, proper ventilation, and proper temperature control)
- ☐ Clean, unbroken flooring
- ☐ Ample and appropriate learning spaces (cafeterias, gyms, auditoriums, playgrounds, libraries, and computer labs with enough computers for all students)
- ☐ Class sizes that allow for one-on-one attention

Well-Rounded Curriculum: All students need access to the right courses to prepare them for life after graduation.

- ☐ Full day kindergarten
- ☐ Fine Arts (music, art, and theatre, for example)
- ☐ Advanced courses (science and math, for example)
- ☐ A pathway for advancement for every student (a path from general education courses to college prep, honors, AP and/or IB)
- ☐ Regular physical education classes (150 min./week in elementary school, 225 min./week in middle and high school)
- ☐ Foreign language courses
- ☐ Career and technical education

School Climate: It's important that students feel safe and respected in their classrooms and in their school.

- ☐ Students have a safe, reliable, and secure way to get to school
- ☐ An environment that welcomes and celebrates diversity
- ☐ A policy of restorative practices to create an environment of respect and collective responsibility (school policy with alternatives to suspension and expulsion)
- ☐ Use of early warning systems to keep students on track
- ☐ A community free from bullying and harassment

Quality Educators: It's important that all educators are prepared and excited to help students excel.

- ☐ Educators who have high expectations for every student in the school
- ☐ Teachers teaching in their credentialed subject
- ☐ Teachers are fully prepared to teach students in their school (teachers have completed a residency program where they were mentored by great teachers)
- ☐ Librarians
- ☐ Paraeducators and other education support professionals
- ☐ All staff trained in positive behavior supports and bullying prevention (all staff includes teachers, paraeducators, other education support professionals, and specialized instructional support personnel (SISP))
- ☐ All school staff contributing to a culturally responsive learning environment
- ☐ Staff that has time to collaborate
- ☐ Relevant, timely professional development

3D: Community
Outreach Guide

PURPOSE

This tool can help you brainstorm how you might meaningfully include parents and the community in your collaboration.

How do we already include the voices of parents and community in decision-making?

How could we better include those voices? Examples:
- Survey parents'/community priorities for district/school improvement
- Hold a community conversation or town hall to solicit input on the district's priorities or on specific topics
- Include parents/community members on committees or task forces
- Reach out to community partners for collaboration

3E: OPSCAN Survey

PURPOSE

The referenced surveys can help you determine stakeholders' needs and wants for their school.

What is OPSCAN?

Optical scanning (OPSCAN) survey tools allow a large number of survey responses to be easily entered and analyzed. NEA has developed a portfolio of surveys covering a broad range of school and educator issues to help gain an accurate view of stakeholder opinions and needs. All responses are anonymous.

How to Use This Tool

We recommend you use this tool to supplement the Opportunity Checklist. After determining stakeholders' most pressing concerns, you can use a survey to dig deeper into opinions on a subset of issues. Surveys can also provide insight into educators' relationships with other stakeholders and their perceived level of voice and influence in their schools.

While the Opportunity Checklist is intended to be informal and result in a preliminary understanding, these surveys provide more formal, scientifically valid quantitative results about both the content issues that stakeholders care about, and about the strength of the relationships among the collaboration partners and stakeholders which can help you move forward with educator-led school improvement efforts. Local associations/unions should administer these surveys with their district leadership to all employees across the district or in targeted schools.

To conduct an OPSCAN survey, a local education association/union member requests a survey through their UniServ director or state affiliate, who works with NEA to conduct the survey. NEA processes the data and provides the results within three weeks. The request must come from an NEA-affiliated individual, such as a local association/union president, and must be approved by the state association/union before being submitted to NEA.

OPSCAN survey topics:

- **Parent and Community Involvement in School:** Rates levels of involvement and satisfaction with various aspects of the school, and gathers information on the roles of parents, school staff, and community members in promoting student achievement and school success.

- **Professional Development Issues:** Contains items about the availability, quality, and effectiveness of PD activities, as well as on desired types of content, delivery, and scheduling.

- **School Culture:** Questions relate to: existence of shared vision, collaboration, communication, time/resources, efficacy, tolerance for ambiguity, culture of inquiry, and reflection.

- **School Restructuring:** Questions relate to: school mission and goals, curriculum, instruction, school organization, facilities and equipment, assessment, and staff development.

- **School Safety and Student Discipline:** Questions relate to: weapons, gangs, illegal drugs, theft, vandalism, and interpersonal behaviors among students and staff, as well as the root causes of student misconduct.

- **Staff Satisfaction:** Questions relate to: job accomplishments, workload and working conditions, professional development and training, compensation and benefits, relationships and communication, administrative leadership and support, and safety and environment, as well as union or professional association services.

- **Technology Issues:** Covers a broad range of technology-related areas, such as how computers are used for instructional purposes, teachers' uses of the internet, obstacles to the use of technologies, and the adequacy of various technologies. The survey is designed primarily for teachers, although others can answer to the best of their abilities.

3F: The Priority Matrix Tool

PURPOSE: This tool can help collaborative teams and committees select a shared content goal to work on by prioritizing among various alternatives.

INSTRUCTIONS

For each identified issue, discuss its relative impact in your district or school and the level of effort that would be required to adequately address it. Then, write the issue in the appropriate section of the matrix. It is recommended that newly-formed partnerships select an issue that falls into the High Value (low effort + high impact) or Quick Win (little to no effort + some impact) categories. As your partnership develops, you'll build your capacity to address Big Projects (high-effort issues of significant impact).

HIGH

Significant Effort, Low Impact =
Low Value

High Effort, Significant Impact =
Big Project

Level of Effort

Little to No Effort, Some Impact=
Quick Win

Low Effort, High Impact =
High Value

LOW

LOW   **HIGH**

Amount of Impact

Commit to Collaborate

Learn the Case for Collaboration	Identify Partners & Discover Shared Goals	Commit to Collaborate

4A: Collaboration Skills Evaluation

PURPOSE | Individually use this self-reflection tool to consider the interpersonal skills that support collaboration, and take inventory of your own strengths and weaknesses. Place a check mark in the bar to indicate your personal capacity in each of the collaboration skills listed below.

Needs work   Great!

- Actively listening to team members
- Agreeing on roles that capitalize on individual strengths
- Analyzing problems without assigning blame
- Building consensus
- Compromising when necessary to move the group forward
- Delegating tasks with open discussion
- Displaying a willingness to problem solve
- Encouraging reluctant group members to participate
- Facilitating group discussion
- Following through with commitments
- Forgiving others when they come up short
- Giving credit to others for their contributions
- Identifying compatible partners to carry out projects
- Identifying obstacles to success
- Maintaining a sense of humor
- Recognizing the strengths and weaknesses of others
- Sharing feelings of frustration or dissatisfaction as they occur
- Speaking respectfully with team members
- Taking a leadership role
- Taking responsibility for mistakes
- Updating collaborators on project developments

Adapted from Doyle, A. (2018). Collaboration Definitions, Skills, and Examples. thebalance.com/collaboration-skills-with-examples-2059686

4B
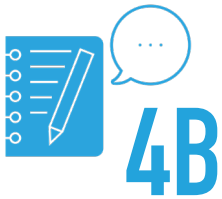
Consider & Discuss:
Individual Collaboration Skills

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on your responses to the Collaboration Skills Evaluation, tool 4A, and record your responses to the prompts below.

As an individual, which collaboration skills come easily to me, and which are more challenging?

_____

_____

_____

_____

_____

In this partnership, which collaboration skills would I like to strengthen?

_____

_____

_____

_____

_____

What can I do to strengthen my collaboration skills?

_____

_____

_____

_____

_____

_____

4C: Collaborative Attributes List

Collaborative groups should use this tool to discuss the collaborative attributes that are most relevant and important to the group.

INSTRUCTIONS

Use this tool as a discussion guide for your group, to consider the collaborative climate attributes that are most important to you. What attributes would you like to see in your partnership? Hold an honest conversation about each attribute: Do you agree it would be worthwhile? How have you demonstrated the attribute in the past? If you agree it's worthwhile and you haven't demonstrated it well to date, what will you do to improve going forward?

☐ **Awareness** – We each see ourselves and each other as necessary parts of a working system

☐ **Motivation** – We have the drive to gain consensus when engaging in joint problem-solving

☐ **Participation** – We are equally committed to participating in a collaborative partnership

☐ **Shared decision-making** – Working together is the default and we collaborate on as many important decisions as possible

☐ **Professional discretion** – We respect the professional autonomy of those within our system and create space for role-appropriate, independent decision-making at all levels

☐ **Peer collaboration** – We support educators in working together for their students' success

☐ **Social support** – We portray each other as valued partners to our peers

4C: Collaborative Attributes List (cont'd)

☐ **Goal alignment** – We seek to align goals among stakeholders in our system by emphasizing our common purpose and shared priorities

☐ **Authenticity** – We are honest with each other about our thoughts, feelings, and opinions

☐ **Psychological safety** – We create an environment where all partners feel comfortable sharing thoughts and opinions, and where participants are not harshly judged for mistakes, voicing concerns, or holding unpopular viewpoints

☐ **Mediation** – We are able to positively negotiate, compromise, and get to agreement

☐ **Reciprocity** – We share information, and we expect sharing in return through reciprocity

☐ **Reliability** – We are consistently reliable, and in return expect our partners to follow through

☐ **Reflection** – We think through the possibilities, and are willing to consider alternatives

☐ **Engagement** – We proactively engage, rather than wait and react

Enter any additional attributes here:

_____

_____

_____

_____

Adapted from indicators of a collaborative climate in research from McCarthy and Rubinstein (2017), from information found at: aiim.org/What-is-Collaboration# and blog.risebeyond.org

4D: Building a Strong Partnership

PURPOSE

This tool presents key components to successful partnerships – the sustainable structures that you're committing to build together. Use it to discuss *what* you'll commit to; other tools will help with *how* to do it.

INSTRUCTIONS

Discuss each component with your partners. What do they mean to you? What are your partnership's aspirations for each component? After your discussion, partners can write their initials in the box provided.

KEY COMPONENTS TO A STRONG EDUCATION PARTNERSHIP   INITIALS

An agreement between district and education association/union leadership to work together with local stakeholders on plans to improve schools, and a **pledge not to let each other fail.**

A commitment to **start somewhere.** Identify shared student-centered goals, and then work collaboratively and share decision-making in the improvement processes to achieve them.

A rich web of communication and collaboration structures among stakeholders at all levels of the local school system (e.g., regular meetings between district department leaders and educators appointed through their association/union; district- and school-level leadership teams; working committees; professional learning communities).

Planning tools and defined goals and objectives, so that everyone involved in collaboration understands expectations of the group members, the work to be done, and so that progress can be monitored and managed.

Training and ongoing support in collaborative processes, relationship building, and subject matter expertise.

Connection to other education partnerships working on similar projects, or in a similar context, for sharing and mentorship.

4E

Consider & Discuss: Guiding Principles & Behaviors

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

Which of the principles from ABC's PAL were most compelling, and why?

_____

_____

_____

_____

_____

Which principles do we feel strongly about adopting in our district?

_____

_____

_____

_____

_____

What behaviors are we willing to commit to, to foster our partnership?

_____

_____

_____

_____

_____

4F: Guiding Principles Guiding Behaviors:
Codifying Your Commitments

This tool can guide you and your partners toward agreeing upon and codifying the guiding principles and guiding behaviors that will characterize your working relationship.

STEP 1

Discussion

Gather your partners together to discuss your shared vision for the partnership. Keep the focus on the relationships, not a particular topic.

Use the following questions to guide your discussion, and then use what you discuss to serve as the foundation for your shared commitments.

- What do you both/all believe about the role of education/school in students' lives?
- What do you both/all believe about your responsibilities towards students?
- What do you both/all believe about each stakeholder's roles in student success?
- How should disagreements be handled?
- When your partner is not in the room, how will you speak to others of them and this partnership?

STEP 2 — Write Your Commitments
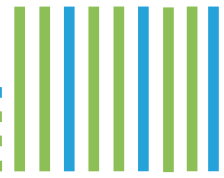
Guiding Principles

We believe...
[Draft your shared beliefs about your students and your shared responsibility for ensuring their success.]

_____

_____

_____

_____

_____

Guiding Behaviors

We will honor these principles in our relationship with one another by...
[Draft your commitments toward one another – the behaviors that will characterize your relationship as partners.]

_____

_____

_____

_____

_____

4G: Overarching Goals Template

PURPOSE This tool can help leadership teams clarify their overarching goals. Partnership goals often include both content-related goals (the initiatives that you'll form working committees to address collaboratively) and relational goals (what steps can we take to uphold our guiding principles and behaviors?).

Partnership Goals

Now that your team has a clearer idea of how you'll work together and the principles and behaviors most important to you, revisit your work from *Discover Shared Goals*, Chapter 3, and articulate what issue(s) you'll address and what you hope to achieve. A content goal might read, "By the end of next year, we'll increase the percentage of fourth-graders meeting ELA standards in targeted schools." A relationship goal might read "Partners will attend joint training in collaboration at least once per year."

Write your overarching partnership goals here.

4H: Sample Joint Letter

INSTRUCTIONS: Use the following example to craft your own joint letter announcing your partnership, describing your shared commitments, the topic the partnership will first address, and how you envision the work getting started.

Dear employees of **[school district]**,

Dear **[stakeholder(s)]**,

We are very excited to announce our commitment to engage in a formal collaboration process to address **[topic]** in our school system, an issue that has significant impact for our students. We will be working together to co-create solutions. We have committed to not letting each other fail in this endeavor.

Research has long shown that collaboration between and among educators in a school yields positive outcomes. **[School district]** is a school system that values the voice and professionalism of its educators. We know that educators are closest to the students and are uniquely positioned to advise on issues of teaching and learning. More recent research has shown that a formal education partnership between a district's administrators, education associations/unions, and other stakeholders can serve as a powerful antecedent to educator collaboration within schools.

Over the next couple of months, we will form district and school leadership teams to support working committees around **[issue]**. The committees will include representatives from throughout the school system who have an interest and the skills to realize our goal. All working committee members will have a shared voice in decision-making and the group process. District and school leadership teams will provide support and oversight for the project. These teams will be comprised of members from all aspects of system leadership – administrators, education association/union representatives, school board members, and parent and community members.

This partnership may require us to work together in new ways, and we hope you will join us in our excitement and follow our collaboration process so that – together – we can make a difference in the lives of our students.

Respectfully,

[Partner 1] and **[Partner 2]**

Identify Collaborative Teams & Functions

Consider & Discuss: Collaborative Structures

5A

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What committees or other working groups already exist in our system, and at what levels?

_____

_____

_____

How do these existing groups align with our partnership's identified overarching content goals?

_____

_____

_____

_____

Do these existing groups currently function collaboratively?

_____

_____

_____

What additional teams and committees should we create over time to address our shared goals?

_____

_____

_____

_____

_____

5B: Map Your Working Groups
The District Level

PURPOSE

This tool can help you think through who should be represented on your DLT, consider the district-level working committee(s) that might be needed to address specific aspects of your overarching district content goal(s), and identify schools where you want to implement collaborative structures and processes.

INSTRUCTIONS: Part 1– Brainstorm DLT Members

Knowing what you now know about District Leadership Teams, enter the names of any individuals you'd like to join you as part of the DLT in the spaces below. Remember that a strong leadership team composition includes leaders and representatives from administration, the education association/union, school boards, and parent and community groups, particularly those representing historically marginalized populations. Use the table below to help you consider the stakeholders who should be encouraged to participate on your DLT.

Represented Stakeholder Group or POV	Potential DLT Member

INSTRUCTIONS: Part 2– Map Your Working Committees

Use this part of the tool to: revisit your shared content goals; brainstorm the working committees you'd like to see addressing each goal; consider if there are existing committees or task groups that would be good candidates to take on this collaborative work, or if a new working committee is needed. Use a separate worksheet for each shared goal or working group.

Shared Goal/Focus Area of Working Group: _____

_____

_____

Map Out the Working Group To Tackle That Goal

Is there an existing working group that might take on this work? If so, do they currently function collaboratively? Are participants capable of authentic collaboration? If you think they are, continue with the questions below. If not, it may be advisable to convene a new team or committee.

For this existing group, who is included? Who else should be included? Beyond the group's members, should other modifications be made? (such as to their scope, purpose, methods, meeting frequency, etc.)

INSTRUCTIONS: Part 3 – Select Your Schools

Select the school(s) where you'll establish collaborative structures. Consider and discuss the following in making your selections.

Do our shared goal affect all schools, or just some?

_____

_____

_____

_____

_____

_____

Do we want to implement SLTs at several schools to encourage cross-pollination of ideas and solutions, or pilot with one school first?

_____

_____

_____

_____

_____

_____

_____

Which schools already have a collaborative atmosphere that would make them good candidates for this work?

_____

_____

_____

_____

_____

_____

_____

5C: Map Your Working Groups
The School Level

This tool can help you think through who should be represented on your SLT, and consider the school-level working committee(s) that might be needed to address specific aspects of your school's content goal(s).

School Name: _____

INSTRUCTIONS: Part 1– Brainstorm SLT Members

As with the DLTs, a strong leadership team composition includes leaders and representatives from administration, the education association/union, school boards, and parent and community groups, particularly those representing historically marginalized populations. Use the table below to help you consider the stakeholders who should be encouraged to participate on your SLT.

Represented Stakeholder Group or POV	Potential SLT Member

INSTRUCTIONS: Part 2– Map Your Working Committees

Use this part of the tool to: revisit your shared goals; brainstorm the working committees you'd like to see addressing each goal; consider if there are existing committees or task groups that would be good candidates to take on this collaborative work, or if a new working committee is needed. Use a separate worksheet for each shared goal or working group.

Shared Goal/Focus Area of Working Group: _____

_____

Map Out the Working Group To Tackle That Goal

Is there an existing working group that might take on this work? If so, do they currently function collaboratively? Are participants capable of authentic collaboration? If you think they are, continue with the questions below. If not, it may be advisable to convene a new team or committee.

For this existing group, who is included? Who else should be included? Beyond the group's members, should other modifications be made? (such as to their scope, purpose, methods, meeting frequency, etc.)

5D: Collaborative Structures Worksheet

PART 1 INSTRUCTIONS:

Use the sample chart of collaborative structures below as a guide to draw your existing structures, then consider what additional teams or committees you might want to establish. Draw your chart on the next page.

District Leadership Team

Working Committee
Focus Area:
Elem & Middle Schools
(existing)

Working Committee
Focus Area:
High Schools
(existing)

Working Committee
Focus Area:
Child Development
(existing)

Working Committee
Focus Area:
Adult Education
(new)

Working Committee
Focus Area:
ELA Proficiency
(new)

Oakwood MS Leadership Team

Working Committee
Focus Area:
Professional Development
(existing)

Working Committee
Focus Area:
ELA
(existing)

Working Committee
Focus Area:
School Climate
(new)
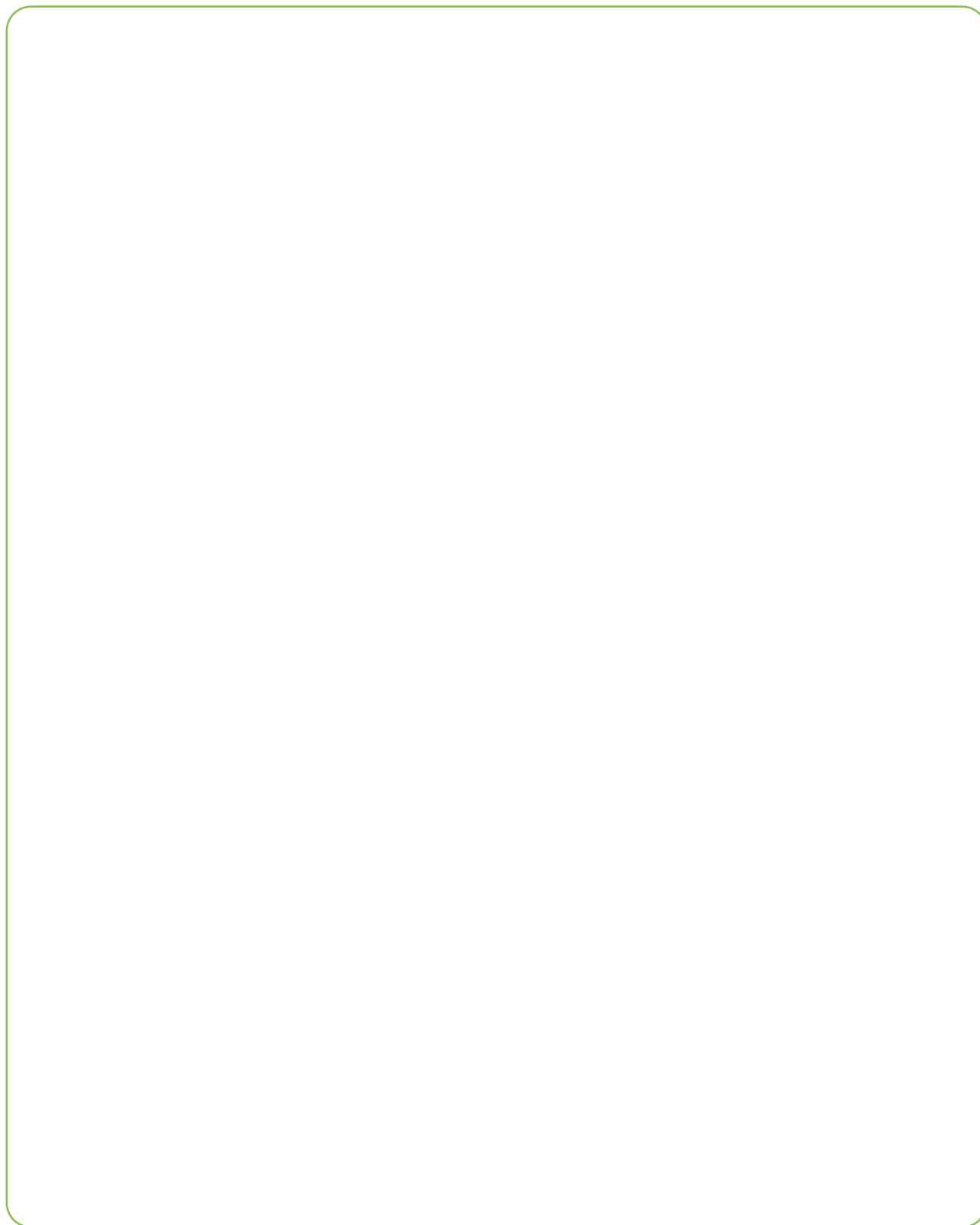
What do our current structures look like?

What's missing?

5D: Collaborative Structures Worksheet (cont'd)

Now draw your own!

5D: Collaborative Structures Worksheet (cont'd)

PART 2 INSTRUCTIONS:

For any new leadership teams or working committees that you identified in Part 1, use the table below to consider who should be represented on each team or committee. Consider those impacted by the issue, as well as those with expertise and/or interest in the issue.

New Structure Name	Who Should Be Included?

Define Content for Collaboration

Identify Collaborative Teams & Functions	**Define Content for Collaboration**	Implement Collaboration
&		
Establish Support Resources	Define Process for Collaboration	

6A

Consider & Discuss: Refining Your Issue

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What aspects of our committee's purpose or issue are most compelling to us?

_____

_____

_____

_____

What aspects do we have the ability to influence?

_____

_____

_____

_____

What information or data might we need to help us decide what to work on first?

_____

_____

_____

_____

What are the best ways to gather that data?

_____

_____

_____

_____

6B: Root Cause Analysis: The Fishbone Diagram

This tool can help a collaborative group define an initiative for their work by better understanding the underlying causes for or contributing factors to the issue at hand, and helping prioritize which cause(s) to address. Fully understanding contributing factors and their significance helps groups hone in specific issue(s) to work on.

INSTRUCTIONS

1. Write the problem or the issue you want to investigate at the head of the fish.

2. Brainstorm the contributing causes and write a cause at the end of each "fishbone."

3. For each cause identified, drill further down into the root causes. Ask yourselves "what are the sub-causes?" Write the answers on the spines of the fishbone below the related cause. Asking why you believe a cause is occurring can help identify sub-causes.

4. Sometimes a sub-cause has its own sub-causes. In those cases, draw additional spines on the fishbone as needed.

5. After identifying sub-causes, return to your causes and evaluate them by asking "if we fixed THIS, how many other things would fall into place?" Then rank each cause, with 1 being the most significant, 2 being the next most significant, etc. Write the ranking in the associated circle.

Note: Depending on your issue and number of potential causes and sub-causes, it may be preferable to do this exercise on a wall or whiteboard with sticky notes.

6B: Root Cause Analysis: The Fishbone Diagram (cont'd)

Identify the Issue

Cause

Cause

Cause

Cause

Cause

Cause

RANKING

RANKING

RANKING

RANKING

RANKING

RANKING
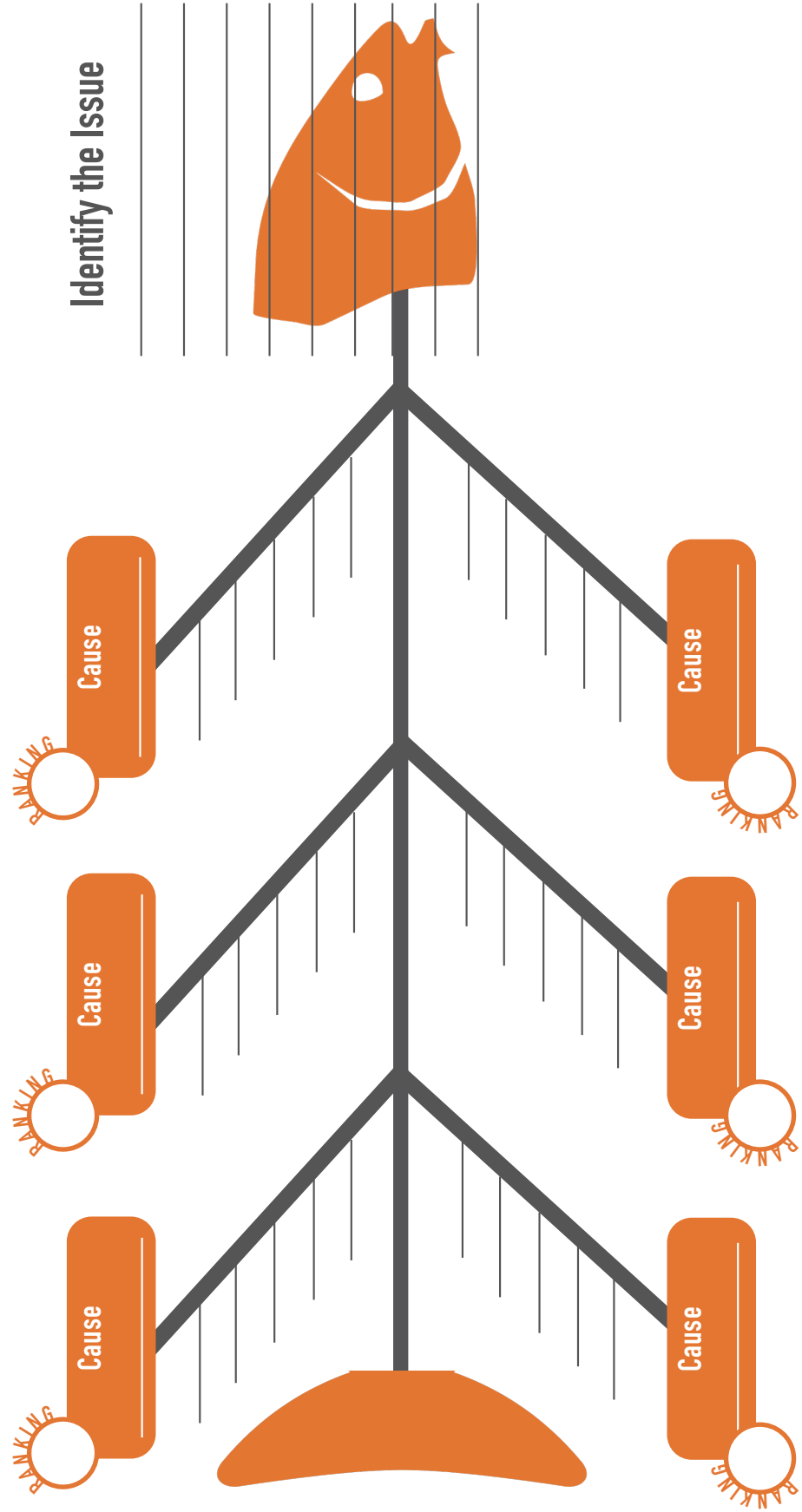
6C: Root Cause Analysis:
The Five Whys

The *5 Whys* is a technique pioneered in the automotive industry by Toyota. It helps a group better understand the root causes of an issue, which makes it easier to decide how to approach solutions. Use this tool to gain further insight into the highest-priority sub-causes identified.

INSTRUCTIONS: Write the original cause. As a group, discuss "why did this occur?" and write down the answer. Continue to ask why each answer occurred until you've answered "why?" five times. Repeat this process for each potential cause of the issue your team has identified.

Example

Issue:	Too many unexcused absences.
Cause:	Notification policies aren't being followed.
Why?	Parents don't know how to report absences.
Why?	They can't find the information on the website.
Why?	The website is poorly organized and labeled.
Why?	Overall website design was not well thought out.
Why?	Funding wasn't available for a professional design.

Template

Issue: _____

Cause: _____

Why? _____

Why? _____

Why? _____

Why? _____

Why? _____
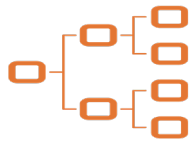
6D: Driver Diagram

PURPOSE: Use a driver diagram to identify possible solutions that will inform your committee's project objectives.

INSTRUCTIONS

Note: Use the template below as a guide. There is no set number of drivers on a driver diagram; edit the diagram to suit the topic you're working with. You may also find it easier to complete this activity on a whiteboard or using sticky notes.

1. Write the project goal on the left-most box.

2. Brainstorm some ideas about where the issue's solution might lie. These are the primary drivers. The causes identified in the fishbone analysis are often reframed into primary drivers. Enter primary drivers in the appropriate boxes of the driver diagram.

3. Next, brainstorm the possible components of the primary drivers. These are typically discrete, actionable ideas that, once identified, can help clarify how to accomplish the goal. These are the secondary drivers – enter them in the Secondary Driver boxes. Causes and sub-causes from the fishbone analysis can become secondary drivers by asking "what might we do differently related to this cause that would be likely to help achieve our goal?" Secondary drivers become the project objectives.

Goal:

Primary Driver:

Primary Driver:

Secondary Driver:

Secondary Driver:

Secondary Driver:

Secondary Driver:
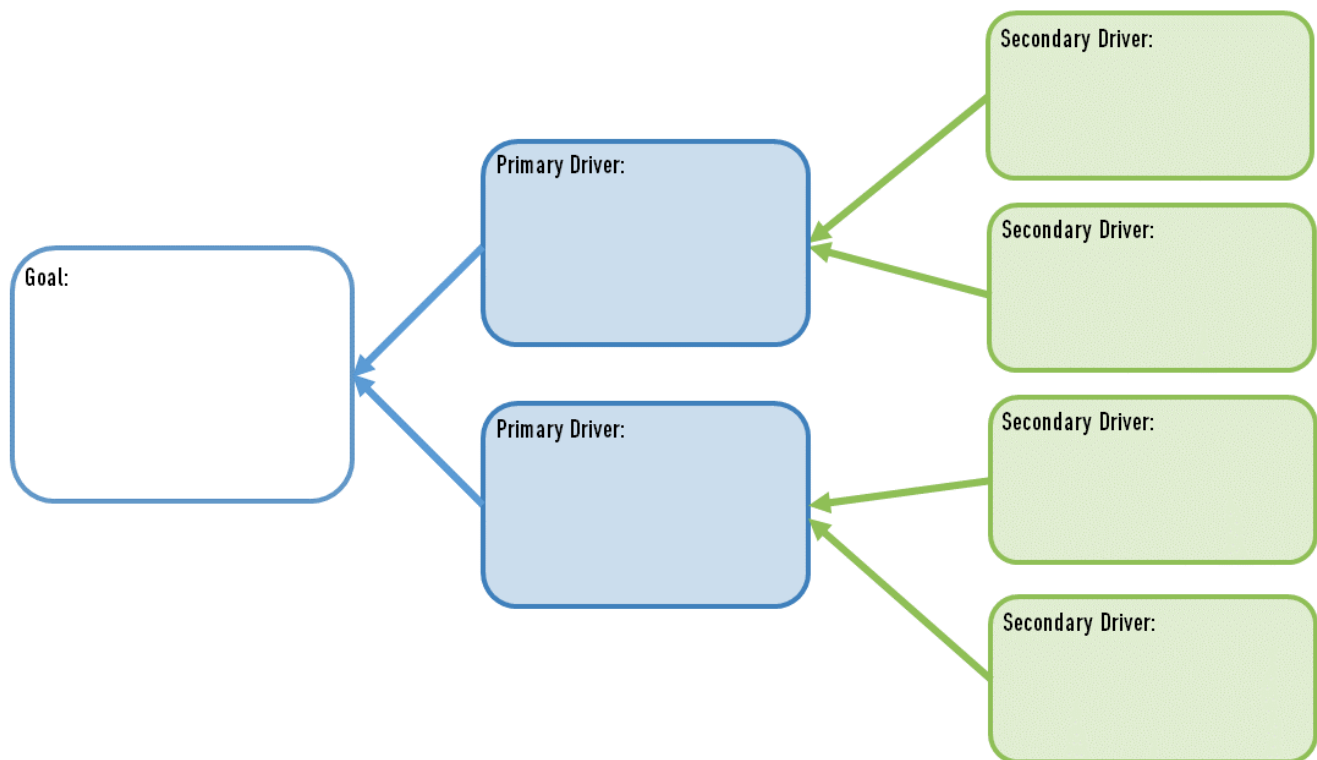
6E: Goal and Objectives Template

PURPOSE

This tool can help collaborative groups define a project goal and identify objectives toward that goal.

Initiative Goal

State your goal in terms of your desired result and time frame. For example, a goal related to language arts achievement might read, "By the end of this year, we will select a new language arts curriculum and it will be implemented next year in targeted schools."

Write your initiative's goal here:

_____

_____

_____

_____

Initiative Objectives

Objectives outline the steps you'll take to achieve your goal. Use the guiding questions below to help you write your objectives, then record them on the following page.

As you write your objectives, make sure that they are:

🖉 Specific: What do we want to achieve in this step towards our goal?

🖉 Pertinent: Does completing this objective bring us closer to achieving our goal?

🖉 Realistic: Do we have the resources and capabilities to complete this objective? If not, do we have a way to access additional resources?

🖉 Data-informed: What determines success? What information or metrics will we use to measure progress?

🖉 Time-bound: Do our objective deadlines align with the overall goal time frame? Do some objectives have to be met before others can begin?

6E: Goal and Objectives Template (cont'd)

Initiative Objectives
Objective 1:
Objective 2:
Objective 3:
Objective 4:
Objective 5:

When you set and achieve objectives, you will have reached your goal!

Consider & Discuss:
Project Planning

6F

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What steps might be needed to reach each objective?

_____

_____

_____

_____

_____

_____

_____

Is our current committee membership broad enough to accomplish this work, or are there others we should invite to join us?

_____

_____

_____

_____

Will we need outside support, such as a subject matter expert, specific school or district data, etc.?

_____

_____

_____

_____

_____

6G: Project Plan Template

This tool helps your team plan, track initiative progress, re-evaluate tasks, subtasks and due dates, and ultimately demonstrate success.

Because a project plan is meant to be a working, evolving document, we suggest you use an editable Excel or Word version and use the template below as a guide. You should customize the template to fit your project, such as adding columns for notes or other project information.

1. Enter the goal and objectives recorded in Tool 6E, *Goal and Objectives Template*, in the appropriate rows.
2. For each objective, enter the necessary tasks and subtasks.
3. For each task and subtask, enter the initials of the person responsible for overseeing the work, the expected date the task will be completed, and any deliverables or other output of the effort.
4. Save your plan where all team members have access (such as a shared drive or Microsoft Teams) so each member can review and update the plan.
5. During the project, each lead should use the *% Complete* column to let other committee members know of their progress.

Goal:				
Objective 1:				
	Lead	**Due Date**	**% Complete**	**Product/Output/Metrics**
Task 1:				
Subtask 1a:				
Subtask 1b:				
Task 2:				
Task 3:				

Establish Support Resources

Identify Collaborative Teams & Functions	Define Content for Collaboration	
Establish Support Resources &	Define Process for Collaboration	Implement Collaboration

Consider & Discuss: Support for Working Committees

7A

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What relational support might the working committees need as they begin their work? Throughout their projects? How might we provide that?

_____

_____

_____

_____

_____

What content areas are working committees addressing? What types of content-related support might they need?

_____

_____

_____

_____

_____

Will we need to budget and arrange logistics for outside support, such as trained facilitators or subject matter experts?

_____

_____

_____

_____

_____

7B: Support Resources

This tool can help you identify sources of support for the collaborative teams and committees in your partnership. The completed tool is a clearinghouse of potential support resources that you can refer to and add to throughout your partnership's work.

INSTRUCTIONS

Brainstorm available content-specific and relational support resources, and use the chart below to document who might be able help, and the types of support they can provide.

Relational Support Resources	Content–Related Support Resources
Organization/Contact: Support Available/Area of Expertise:	Organization/Contact: Support Available/Area of Expertise:
Organization/Contact: Support Available/Area of Expertise:	Organization/Contact: Support Available/Area of Expertise:
Organization/Contact: Support Available/Area of Expertise:	Organization/Contact: Support Available/Area of Expertise:

7C: Role–Alike Comms Worksheet

This tool can help district administrators and education association/union leaders align their leadership structures to establish regularly scheduled communications between key individuals.

INSTRUCTIONS

1. Enter existing district administration positions under District Administration on the left.
2. Where there's an association/union position that corresponds well, enter the association/union position across from the corresponding administrator.
3. Where there's not alignment, are there association/union positions that can be repurposed or created to better align with administration? Make a plan to address them. Refer to the ABC Unified example, if desired.
4. Help establish standing meetings by introducing the individuals, explaining the purpose and importance of this ongoing communication, and making a recommendation for how often they might meet.

How Might You Align Leadership Structures?

District Administration		Association/Union
	⟷	
	⟷	
	⟷	
	⟷	
	⟷	
	⟷	

Consider & Discuss:
7D Communicating Within the Partnership

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

How will our team keep informed about working committee projects, and how can working committees communicate with us about support needs and project status? What types of communication structures might best support that? Consider meetings or other check-ins, scheduled emails, an online collaboration space such as Slack or Microsoft Teams, shared project files, etc.

_____

_____

_____

_____

_____

_____

What existing venues do we use to communicate with your own stakeholders? How will we use those venues to communicate with them about the partnership and collaborative projects? Or, will we use new/additional venues for this work? Remember to consider two-way communication: communication from members and staff to partners, and from partners to members/staff.

_____

_____

_____

_____

_____

_____

7E: Communication Plan Template

PURPOSE

This tool can help leadership teams define their communication plans, both individually with their internal stakeholders and within the partnership.

PART 1: Practitioner/Stakeholder Communications

Each leadership team member should use the template below to define how and how often you'll communicate with your internal stakeholders. Remember to consider both reporting to your stakeholders on progress and successes, and gathering stakeholder input to bring back to the leadership team.

Stakeholder Group	Objective/Content	Method & Frequency	Responsible Party
Association members	Report on committee projects; listen for emerging issues	Monthly 10-minute meeting + newsletter	Building reps

7E: Communication Plan Template (cont'd)

PART 2: Intra-Partnership Communications

Use the template below to define how often your leadership team will check in with each of your teams and committees, and the types of information to be shared.

....

Team or Committee	Objective/Content	Method & Frequency	Responsible Party
Oakwood working committee on ELA	Progress; support needed?	Google Workspace and/or monthly check-in	Working comm

Chapter 8:

Define Process for Collaboration

Identify Collaborative Teams & Functions

Define Content for Collaboration

&

Establish Support Resources

Define Process for Collaboration

Implement Collaboration
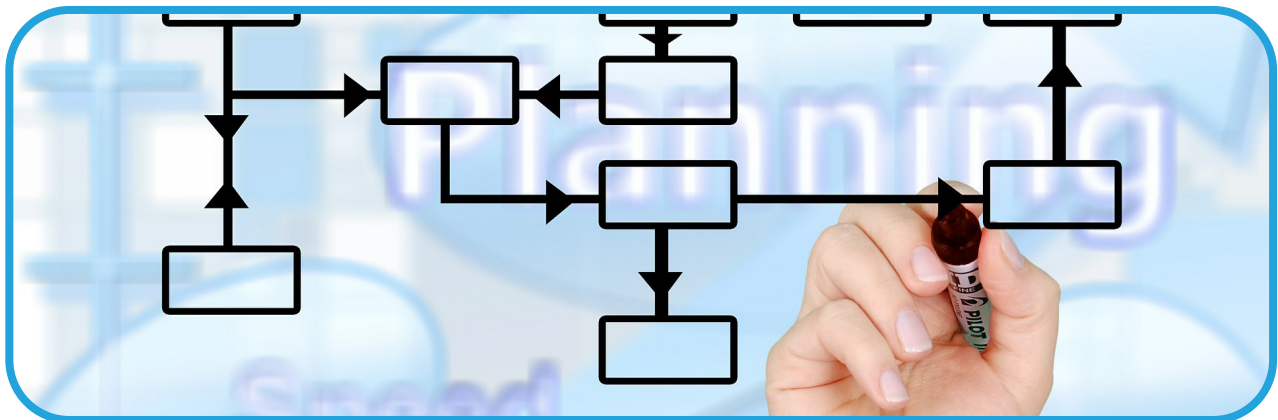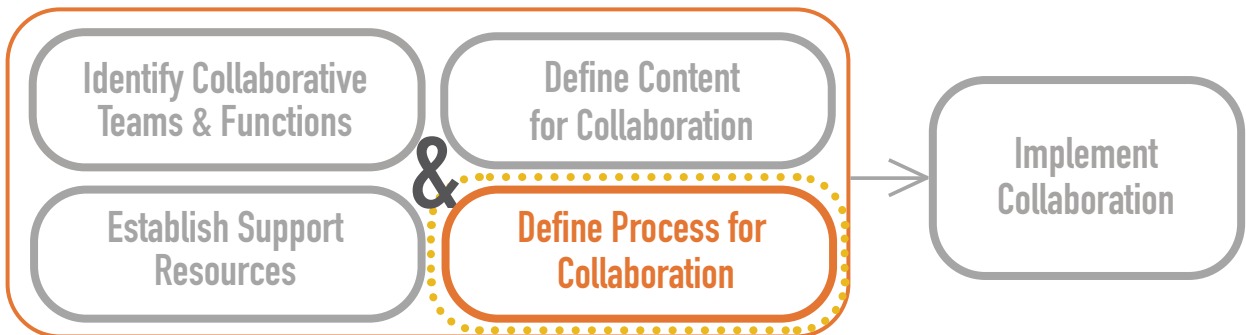
8A: Collaborative Climate
Check-In Tool

This tool can help collaborative teams and committees foster a collaborative climate by assessing their group's current capacity in each of the five characteristics of a collaborative climate.

INSTRUCTIONS As a group, reflect on and discuss your group's capacity in each area, and place a check mark along the scale to indicate where your group falls at this point. Consider: What does this characteristic mean to us? How do we demonstrate it when we work together? How do we demonstrate it with our internal stakeholders? Make an improvement plan for any areas you feel need to be improved.

Today's date: _____

How consistently do we demonstrate each characteristic?

Never   Sometimes   Always

Peer collaboration – The amount and quality of collaboration among stakeholders in a system, encompassing information sharing, social support, and the extent to which stakeholders successfully work together to accomplish goals.

Discretion – The amount of autonomy afforded to stakeholders.

Goal alignment – The extent to which stakeholders work towards common goals.

Psychological safety – The extent to which stakeholders are comfortable voicing their concerns and sharing their opinions.

Shared decisions – The extent to which stakeholders collaborate on important decisions.

Consider & Discuss:
Shared Decision-Making

8B

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

? What types of decisions can truly be shared by our team or committee?

_____

_____

_____

_____

? What types of decisions fall towards the outside of the continuum?

_____

_____

_____

? How will we ensure all participants understand where each decision falls and why?

_____

_____

_____

_____

? Are there meeting logistics or other group norms that might facilitate shared decision-making?

_____

_____

_____

8C: Decision–Making Check–In Tool

PURPOSE: This tool helps collaborative team members clarify which decision-making process will be used for a given decision.

All collaborative group members need clarity about where a given decision falls on the continuum. When one person believes the decision is theirs to make and another believes that decision-making is shared, it leads to disappointment, frustration, and mistrust.

INSTRUCTIONS: Use this tool to assign a number to each decision before the decision-making process starts. Make sure that all group members know what sort of decision-making process is being used for each decision.

The 7-Point Decision–Making Continuum (from W. Patrick Dolan)

1	2	3	4	5	6	7
My Decision, I Will Ask You if I Need You	*My Decision, and I Will Inform You*	*My Decision After We Consult*	*We Will Make the Decision Together*	*Your Decision After We Consult*	*Your Decision, and Will Inform Me*	*Your Decision, You Will Ask Me if You Need Me*

Act: Define Process for Collaboration
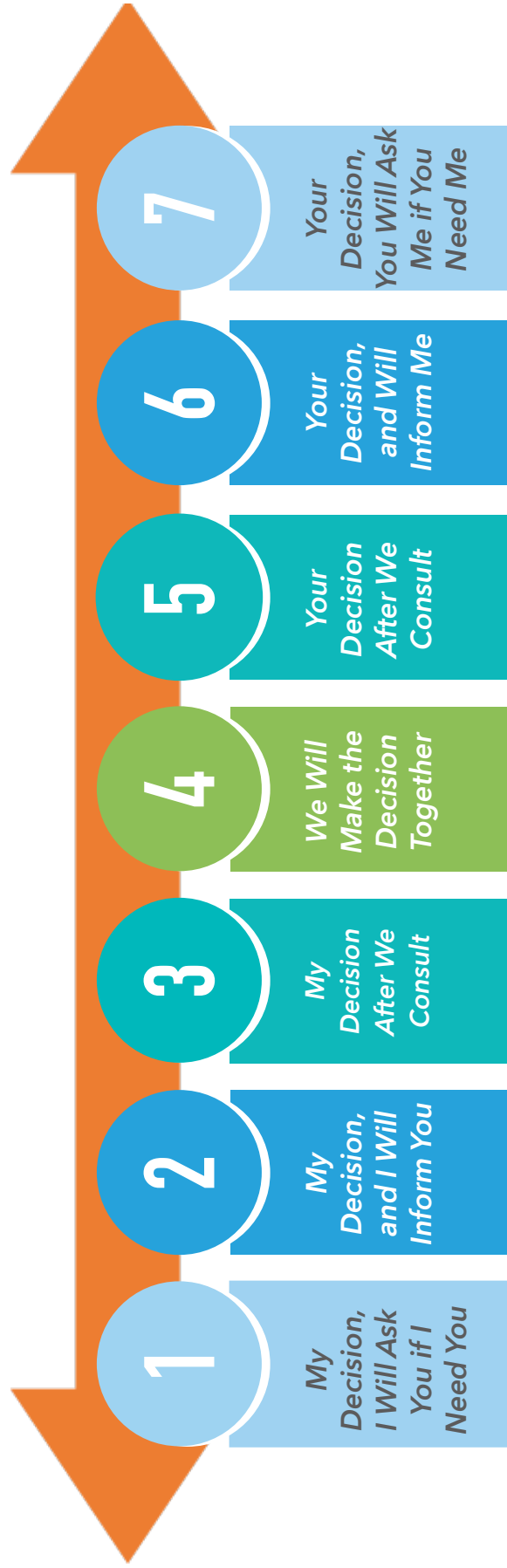
8D: Conflict Resolution Style Inventory

PURPOSE

This tool can help individuals identify their more and less dominant conflict resolution styles within a particular context.

Consider sharing and discussing individual results as a team to better understand your team's dynamics.

INSTRUCTIONS: Think about a recent or recurring type of conflict you've faced. Then, read each statement below and enter the score that reflects how often the statement accurately describes your approach to that conflict.

Transfer the scores to the scoring box at the end of the activity and total the scores by column to see your dominant and less dominant conflict resolution styles within the chosen context.

Complete the inventory again with a different context in mind to determine how your style is affected by different contexts.

SCORES:
1 = Never   2 = Seldom   3 = Sometimes   4 = Often   5 = Always

1. _____ I avoid getting in the middle; I keep any disagreement to myself.
2. _____ I use my position to influence others to accept my suggestions.
3. _____ I believe in meeting each other halfway.
4. _____ I usually allow concessions to others.
5. _____ I try out various ideas to see if there is a way to satisfy all sides.
6. _____ I usually avoid discussing my differences of opinion with others.
7. _____ I am able to use my authority to get decisions in line with what I want.
8. _____ I will find a middle road to avoid an impasse.
9. _____ I try to accommodate the other side's wishes.
10. _____ I try to work my plan into the other side's plan for a mutually acceptable approach.
11. _____ I try to stay out of disagreements with others.

12. _____ I use my expertise to get a result that works for me.

13. _____ I propose a middle ground to try to break the deadlock.

14. _____ I tend to go along with others' suggestions to satisfy their needs.

15. _____ I try to work with others to find solutions that satisfy all expectations.

16. _____ I try to keep my disagreement to myself to avoid hard feelings.

17. _____ I generally pursue my side of an issue.

18. _____ I negotiate with others to reach a compromise.

19. _____ I am often persuaded to support other people's suggestions.

20. _____ I share information in order to solve the problem together.

21. _____ I try to avoid unpleasant exchanges with others whenever possible.

22. _____ I sometimes use my power to gain the upper hand.

23. _____ I use "give and take" so that a compromise can be reached.

24. _____ I usually try to satisfy the other person's expectations.

25. _____ I try to bring all concerns out in the open to resolve the issue.

Score Your Responses:

For each question, enter your numerical response in the corresponding box below, then total the scores by column then check your results using the scoring guidance below.

1:	2:	3:	4:	5:
6:	7:	8:	9:	10:
11:	12:	13:	14:	15:
16:	17:	18:	19:	20:
21:	22:	23:	24:	25:
Total =	Total =	Total =	Total =	Total =
Avoid	Compete	Compromise	Accommodate	Collaborate

Scoring;

21 - 25 points:	this is a very dominant tendency
15 - 20 points:	this is a slightly dominant tendency
11 - 14 points:	this is an average tendency is neither dominant nor minor
6 - 10 points:	this is a less dominant tendency
0 - 5 points:	this is a minor tendency

8E: Group Norms Activity

INSTRUCTIONS Distribute color-coded sticky notes for the six categories below, and project on a screen or distribute the category descriptions below. Ask all participants to brainstorm words and phrases they want to include in the group norms, ensuring everyone has at least one idea for each category. It may also be helpful to think in terms of "What would make our time together meaningful and enjoyable?" Use the responses to complete the template on the next page.

Meeting Logistics

- *When and where do we meet?*
- *How often? For how long?*
- *Will we require a quorum?*
- *How will cancellations or rescheduling be handled?*

Recordkeeping

- *How will agendas be developed?*
- *What will be recorded?*
- *How will notes be recorded and distributed?*
- *How will we handle disputes over what was recorded?*

Confidentiality

- *Will meetings be open to others?*
- *What meeting topics/information will be considered confidential?*
- *Will we jointly develop "talking points" that can be shared outside of the meeting?*

Open Participation

- *How will we encourage all members to participate?*
- *What can we do to promote active listening and discourage interruptions?*
- *What can we do to help us favor inquiry over judgment? To help us respect all voices?*

Decision–Making

- *How will we make group decisions and make sure everyone understands the process for a particular decision?*
- *How will we encourage inclusive decision-making?*
- *What process will we use to reconsider previous decisions?*
- *How will we addresses conflicts?*

Member Expectations

- *What are our expectations for meeting attendance and participation?*
- *What attitudes will we use when talking about our partnership with others?*
- *Do we want to establish norms regarding cell phone use and other distractions during our meetings?*

8E: Group Norms Activity (cont'd)

Meeting logistics:

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Recordkeeping:

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Confidentiality:

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Open Participation:

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Decision-Making:

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Member Expectations:

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Chapter 9:

Implement Collaboration

Identify Collaborative Teams & Functions	**Define Content for Collaboration**
Establish Support Resources	**Define Process for Collaboration**

&

→ **Implement Collaboration**
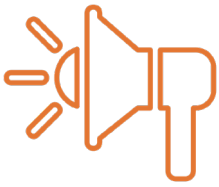
9A: External Communications Plan
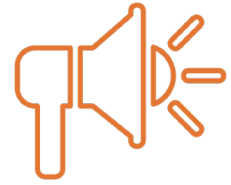
PURPOSE

This tool can help leadership teams plan how they'll communicate about the partnership and resulting positive impacts to the community at large.

INSTRUCTIONS

Use the template below to brainstorm who it's important to communicate with, and how and how often you'll communicate.

Venue	Objective/Content	Method & Frequency	Responsible Party
Community website	Recognize individuals; milestones, outcomes	Monthly	RDG

9B: Working Committee
Check-In Tool

Leadership teams can use this as a template to record the content and outcomes of their check-ins with each working committee to maintain a record of topics discussed and action items.

INSTRUCTIONS

- Use one copy of this tool for each working committee.
- At your initial check-in, discuss the working committee's anticipated project milestones (from their project plan), and any support needs they anticipate at this point, and enter the information in the *Schedule of Anticipated Milestones* section. This can help the leadership team anticipate support needs.
- Update the *Schedule of Anticipated Milestones* as needed throughout the working committee's project.
- Use the *Check-In Notes* section to record an overview of each check-in, including any resulting action items.

Working Committee Name: _____

Issue or Topic: _____

Schedule of Anticipated Milestones:

Milestone Description:	Anticipated Completion Date:	Anticipated Support Needs:	Other Notes:

9B: Working Committee Check-In Tool (cont'd)

Check-In Notes:

Check-In Date:	Attendees:	Topics Discussed:	Action Items & Responsible Party:	Other Notes:
12/1/21	AB, FL, RO, CC, RD	Committee is struggling to unpack high school students' lack of informational text comprehension	☐ CC to provide district assessment data by 1/15 ☐ PL to contact SME for possible consulting by 12/15	

Chapter 10:

Evaluate Content & Process Outcomes
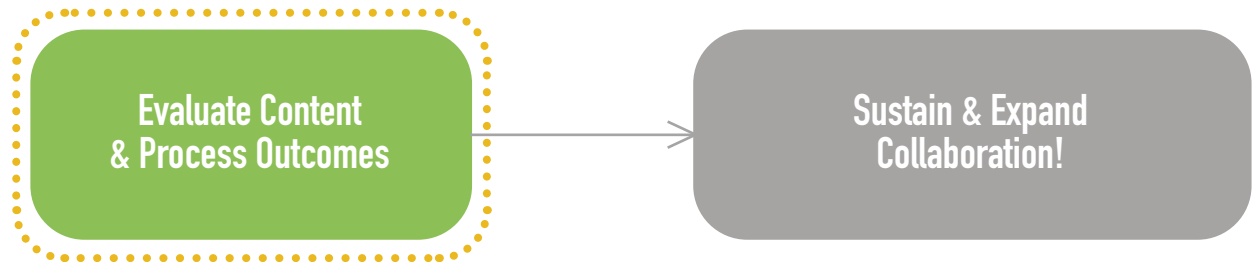
Evaluate Content & Process Outcomes → Sustain & Expand Collaboration!

Consider & Discuss:
Evaluating Project Resolution

10A

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

Did we meet our project goal? How do we know? (project plan, survey results, district data, etc.)

_____

_____

_____

_____

_____

What results did we see? If results were not what we hoped for, what are the likely causes?

_____

_____

_____

_____

Do we need to collect impact data to determine the extent to which we've met our goal? What might be the best approach?

_____

_____

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Activity 10A, Consider & Discuss: Evaluating Project Resolution (cont'd)

Did our project plan address all relevant aspects of our topic? Were all stakeholders' priorities represented?

_____

_____

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_____

Were we able to monitor progress throughout implementation? Why or why not?

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Should we conduct a needs assessment to shed light on current conditions and possible next steps?

_____

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10B: Results Analysis Template

PURPOSE This tool will help your team analyze the success of your work, and allow you to consider whether to continue the activities, modify them going forward, or stop doing them altogether.

As a team, complete a copy of this form for each major task, strategy, or process your team used to achieve your goal.

Task/Strategy/Process Employed:

_____

_____

How Effective Was It? In What Ways? (Hint: Use Data!)

_____

_____

_____

_____

_____

_____

Based on Your Results, Decide How To Proceed:

ADOPT	ADAPT	ABANDON
It worked! Standardize this idea by putting it into official policies or processes.	It almost worked! Make tweaks to what we did and try again to get even better results!	It didn't work! Ditch this idea and move on to a better one!

For Strategies We'll Adapt: What Should We Change, and How?

_____

_____

_____

_____

10C: Where Are You Going Next?

PURPOSE: This tool can help you and members of your collaborative group to reflect on your collaborative project and plan for your next initiative.

INSTRUCTIONS: Reflect upon your collaborative project. Consider your results and lessons learned, and use this tool to brainstorm your group's next steps. You may decide keep the same goal if your goal was not met, set a higher goal around the same issue, address another aspect of the original issue, or address a new issue.

Then, define your next steps. Consider the strategies you decided to adopt or adapt, the need for data collection/needs analysis, engaging subject matter experts, including new team members, etc.

How close did we get to our goal?

_____

_____

_____

What should our next goal be?

_____

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_____

What are our next steps?

_____

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10D: Identifying Repeatable Processes

PURPOSE: This tool can help you reflect on your collaborative processes, how helpful they were, how well you did applying them, and what you might want to change, if anything, going forward.

INSTRUCTIONS: Think through the collaborative processes you used, such as your group norms, decision-making and conflict resolution processes, communication channels, and project plan implementation. What worked well, and what might be improved? Are there other strategies or approaches that might work better? What can you change to improve them for future use? Carnegie's Adopt/Adapt/Abandon framework can be helpful for this reflection.

Process	How helpful?	What will we change or adapt going forward?

10E: Strengthening Partnerships

PURPOSE This tool can help leadership teams reflect on the strength of your partnerships by reviewing the key components below and considering how to continue strengthening those components.

Key Components to a Strong Education Partnership

An agreement between administration and association/union leadership to work together with local stakeholders on plans to improve schools, and **a pledge not to let each other fail**.

A commitment to *start somewhere*. Identify shared student-centered goals, and then work collaboratively and share decision-making in the improvement processes to achieve them.

A **rich web of communication and collaboration structures among stakeholders at all levels** of the local school system (e.g., regular meetings between district department leaders and educators appointed through their association/union; district- and school-level leadership teams; working committees; and professional learning communities).

Planning tools and defined goals and objectives, so that everyone involved in collaboration understands expectations of the group members, the work to be done, and so that progress can be monitored and managed.

Training and ongoing support in collaborative processes, relationship building, and subject matter expertise.

Connection to other education partnerships working on similar projects, or in a similar context, for sharing and mentorship.

10E: Strengthening Partnerships (cont'd)

Reflect: How Did We Do?

An agreement between administration and association/union leadership to work together with local stakeholders on plans to improve schools, and a pledge not to let each other fail.

☐ **Strong**　　　　☐ **Adequate**　　　　☐ **Needs Work**

We can strengthen this component by.....

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A commitment to *start somewhere*: identify shared student-centered goals, and then work collaboratively and share decision-making in the improvement processes to achieve them.

☐ **Strong**　　　　☐ **Adequate**　　　　☐ **Needs Work**

We can strengthen this component by.....

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10E: Strengthening Partnerships (cont'd)

A rich web of communication and collaboration structures among stakeholders at all levels of the local school system (e.g., regular meetings between district department leaders and educators appointed through their association/union; district- and school-level leadership teams; working committees; professional learning communities).

☐ **Strong** ☐ **Adequate** ☐ **Needs Work**

We can strengthen this component by.....

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Planning tools and defined goals and objectives, so that everyone involved in collaboration understands the work to be done and so that progress can be monitored and managed.

☐ **Strong** ☐ **Adequate** ☐ **Needs Work**

We can strengthen this component by.....

_____
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10E: Strengthening Partnerships (cont'd)

Training and ongoing support in collaborative processes, relationship building, and subject matter expertise.

☐ **Strong**　　　　☐ **Adequate**　　　　☐ **Needs Work**

We can strengthen this component by.....

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Connection to other education partnerships working on similar projects, or in a similar context, for sharing and mentorship.

☐ **Strong**　　　　☐ **Adequate**　　　　☐ **Needs Work**

We can strengthen this component by.....

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Chapter 11:

Sustain & Expand Collaboration!

Evaluate Content
& Process Outcomes

Sustain & Expand
Collaboration!

Consider & Discuss: Scaling Initiative Success

11A

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

Do we need to test whether what worked in one context will work in another?

_____

_____

_____

_____

_____

Do we want to implement similar interventions across a broader population of staff or schools?

_____

_____

_____

_____

_____

Do we want to continue to work on the same topic and either set a more ambitious goal or address another aspect of the topic?

_____

_____

_____

_____

_____

Activity 11A, Consider & Discuss: Scaling Initiative Success (cont'd)

Or, is this issue fully resolved within our system, indicating that it's time to move to other needs? If this is the case, it might be time for a needs assessment to re-evaluate the most pressing issues in your system. For detailed information on conducting a needs assessment and prioritizing issues to address, see the *Identifying and Prioritizing Needs* section in Chapter 3.

_____

_____

_____

_____

_____

_____

How will we stay informed of current system needs and issues? What data will we collect? How often?

_____

_____

_____

_____

_____

_____

11B: Scale & Spread Plan Template

PURPOSE | This tool can help your team develop a detailed plan to help you scale and spread your program/policy/strategy throughout your system.

INSTRUCTIONS: Customize this template as needed to fit your plan and the items you want to track. Revise your plan as needed along the way to incorporate lessons learned and to keep it current.

Complete the *For Each Site/Group* section in concert with each participating site/group to give them ownership of the project and to help ensure consistent expectations. When completing the implementation plan, refer to the information in the *Project Design* section of Chapter 6.

For the Project as a Whole:

Strategy to be scaled/spread: _____

Project lead: _____

Goal: _____

Sites/groups to adopt the change: _____

_____

_____

_____

_____

_____

Overall budget: _____

What resources might the new sites/groups need to be ready to adopt the strategy? (preparation, training, funding, etc.) _____

_____

_____

_____

_____

_____

11B: Scale & Spread Plan Template (cont'd)

For Each Site/Group:

For the site/group - point person(s) & contact information: _____

_____

Point person on leadership team, if different from project lead:

_____

Implementation Plan:

Because your plan is meant to be a working, evolving document, we suggest you use an editable Excel or Word version and use the template below as a guide, customizing it as needed to fit your project.

Objective 1:						
Tasks:	Point(s) of Contact:	Completion Date:	Status:	Resources/Data Needed:	Product/Output /Metrics:	Notes:
Objective 2:						
Objective 3:						

Consider & Discuss:
11C Reinforcing Sustainable Structures

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

What factors give a collaborative structure staying power/sustainability? Can we codify our structures, and in what ways?

_____

_____

_____

_____

_____

Did our teams and committees work well? Why or why not?

_____

_____

_____

_____

What should we change in our overall plan for collaborative teams and committees? Revisit your team's *Collaborative Structures Worksheet* (Activity 5D) and update as needed.

_____

_____

_____

_____

Activity 11C, Consider & Discuss: Reinforcing Sustainable Structures (cont'd)

How might our internal and external communications plans be expanded or improved? Revisit your *Communication Plan Template* (Activity 7E) and update it accordingly.

_____

_____

_____

_____

Did we establish role-alike communications between administration and the association/union (as discussed in *Establish Support Resources* (Chapter 7)? Were they effective? Should we adjust or expand these structures?

_____

_____

_____

_____

Do we have effective and consistent procedures to orient and onboard those new to collaboration?

_____

_____

_____

_____

What additional structures might help us as we expand collaboration in our system?

_____

_____

_____

_____

Consider & Discuss:
11D Sustaining Collaborative Processes

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

Did we use each step within this stage? Why or why not?

_____

_____

_____

What processes were most successful in each stage?

_____

_____

_____

_____

Did we modify our activities within one or more steps in this stage? How so?

_____

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_____

Were there additional steps we performed or processes we used that were helpful?
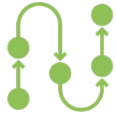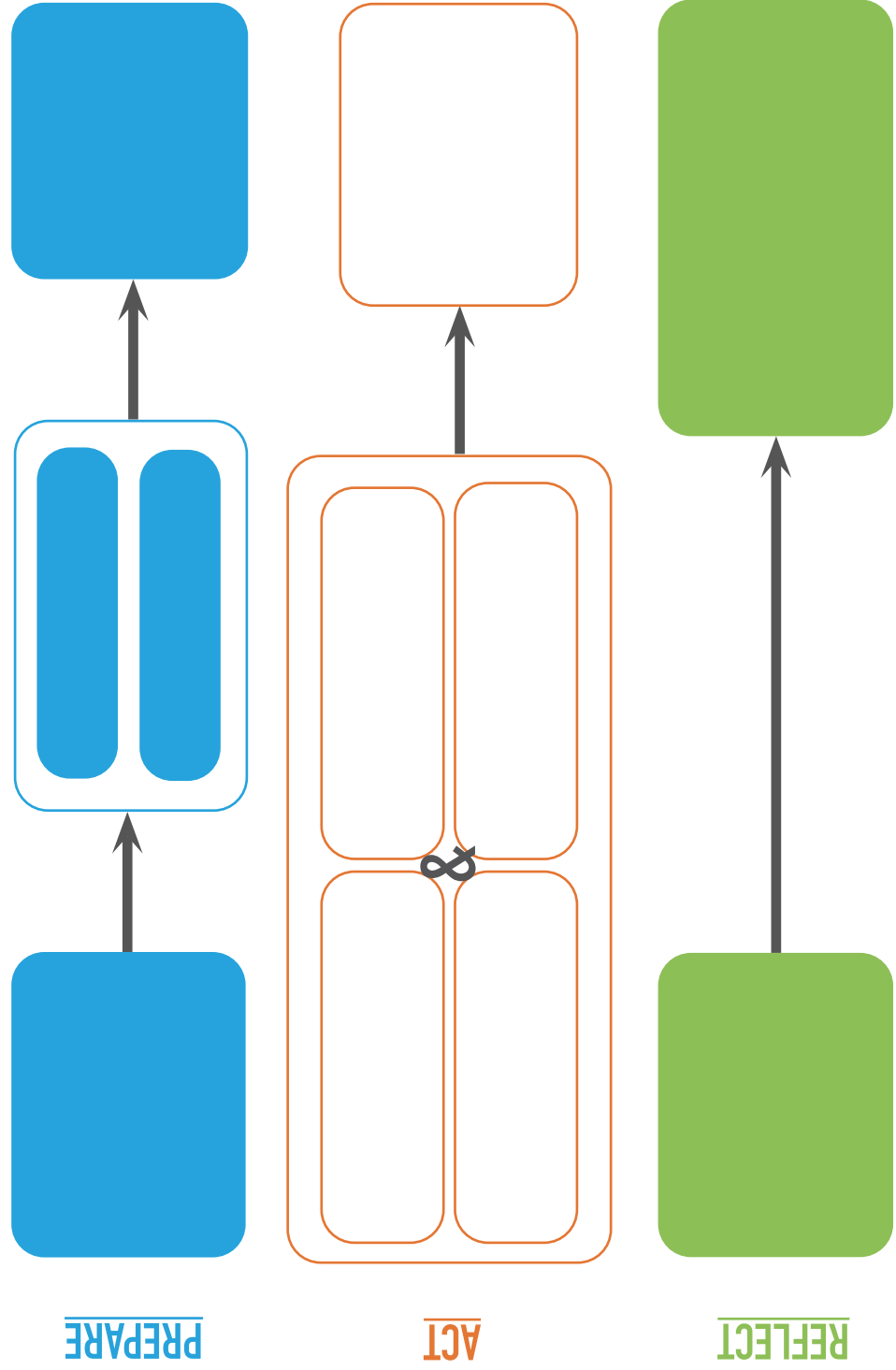
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11E: Collaborative Framework Template

PREPARE

ACT

REFLECT

Consider & Discuss: Expanding the Partnership

11F

INSTRUCTIONS

Spend 10 to 15 minutes reflecting on and responding to the questions below. We recommend that each partner respond to the questions individually, then discuss your individual responses as a group.

Is now a good time to expand our partnership? Why or why not? Is our partnership stable enough to include additional partners?

_____

_____

_____

What perspectives/voices are missing from our partnership?

_____

_____

_____

Does our partnership reflect our community in terms of race, culture, educational background, etc.?

_____

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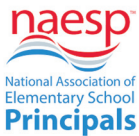_____

How will we onboard new partners?

_____

_____

_____

_____

National Labor Management Partnership

AASA — THE SCHOOL SUPERINTENDENTS ASSOCIATION

aft — A Union of Professionals

CCSSO — Council of Chief State School Officers

naesp — National Association of Elementary School Principals

NASSP — National Association of Secondary School Principals

nea — NATIONAL EDUCATION ASSOCIATION

nsba — National School Boards Association

National Labor Management Partnership
2022