

Guidance Notes for Outside Facilitators

[From the *Guide for Team Designing a Comprehensive System to Address Barriers to Learning and Teaching and Re-engage Disconnected Students*]
<http://smhp.psych.ucla.edu/pdfdocs/studentssupport/toolkit/designteamguide.pdf>

Design Process

After a design team has had its introduction to key concepts and prototype frameworks and participated in formative discussions, the team is ready to focus on the work ahead in terms of a set of specific tasks to be accomplished. These are organized sequentially and in keeping with the team's schedule for the next couple of months.

Design team meetings are facilitated by staff assigned for this purpose. Facilitation involves

- >helping team members prepare for the meeting
- >actively facilitating the meeting itself
- >writing-up first drafts of the products generated at each meeting
- >circulating drafts to elicit improvements from team members
- >revising drafts into a form for inclusion into the design document (see the generic outline for the design document in Appendix A of the *Guide for the Team* ...)

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To make the meeting productive, each member pursues a set of delineated pre-meeting preparation tasks (alone or as part of a work group).

The general format for the meeting itself:

- >sharing of findings from having pursued the preparation tasks
- >analyses to formulate insights and implications
- >design conclusions
- >a presentation highlighting matters related to preparing for next meeting

Additional Guidance Notes about Facilitation

Everyone on a design team probably has done a fair amount of process facilitation. The main point of bringing in outside facilitation is to offer expertise related to designing a comprehensive system of learning supports. The danger in bringing in someone from the outside is that the responsible department leads for the design product, some team members, and staff assigned to facilitate the work during and between meetings will not assume ownership. The process must enhance their sense of ownership and avoid dampening their motivation and initiative. Outsiders must bend over backwards to avoid being viewed as the drivers of the work. Outsiders are there to help as needed and appropriate.

Roles for Facilitating Process

- (a) Primary Meeting Facilitator – Design Team Leader
- (b) Secondary Meeting Facilitators – Outside folks as needed and appropriate
- (c) Staff member to write-up and circulate team work products and upcoming plans

- (1) In the organization meeting(s) to get things going, outside facilitation is used to
 - (a) present a big picture of the imperative for and the key elements of a comprehensive and cohesive system to address barriers to learning and teaching and re-engage disconnected students.
 - (b) present an overview of the work of a design team for developing such a system
 - (b) provide input and backup facilitation as the team undertakes its initial goals
- (2) The outside facilitator can help the team leader prepare the agenda for the first full day working meeting. Here is an example of such an agenda:
 - (a) an enthusiastic kick-off statement by the design team leader highlighting the importance of the work and the commitment of the department leadership to making it happen
 - (b) a brief review of the big picture (e.g., the imperative and the key elements of the system to be designed)
 - (c) overview presentation and team discussion to further clarify the design team's goals, processes, outcomes, timeline, and support needs

- (d) work related to Goals 1 and 2 – some presentation as needed to provide a foundation for carrying out tasks; product-oriented team and smaller work group activities (see Guide for examples of tasks)

[Goal 1: Clarify how student and learning supports are *framed* to address the state's most pressing concerns (e.g., dropout prevention)

Goal 2: Arrive at a recommended design for the intervention framework for a *Comprehensive System of Learning Supports* (e.g., a comprehensive system to address barriers to learning and teaching and re-engage disconnected students by cohesively weaving together school and community resources for learning supports.)]

- (e) detailing the action plan for translating the work of the day into refined product drafts and then circulating these for feedback in the week immediately following the design team meeting
 - (f) detailing action plans for preparing to accomplish Goals 3 at the next meeting
 - (g) summarizing and celebrating what has been accomplished (e.g., through a brief presentation to the Superintendent or Deputy followed by commendations for the work)
- (3) As new folks join in the process, it is essential that steps be taken to bring them up to speed prior to their first appearance at a design team meeting (e.g., they should read what is available and someone should meet with them one-to-one to amplify and clarify). The outside facilitators can help establish a mechanism for this.
- (4) Outside facilitators can provide continuing support (e.g., coaching, technical assistance, review of drafts, feedback) at any time in response to requests and spontaneously as appropriate.
- (5) Involvement of outside facilitators encourages continuing high level involvement (e.g., commitment and endorsement) of the chief state school officer and senior staff at various stages. This is essential to fully integrating the work into the department policies and practices as a high priority.
- (6) Outside facilitators can play similar roles with respect to systemic change strategic planning and then with design roll out and implementation.
- (7) Outside facilitators provide on ongoing catalyst for essential systemic changes.