

**Leading Better-seeking Teams to Improve  
Instructional and Organizational Effectiveness Series:**

## **Orienting & Focusing**



Georgia Leadership Institute  
for School Improvement

**A Performance-based Learning Module  
for Georgia's Educational Leaders**

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# Related Modules

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## Module Series

This **Leading Better-seeking Teams to Improve Instructional and Organizational Effectiveness Series** includes:

- *Leading Better-seeking Teams: Recruiting & Selecting\**
- *Leading Better-seeking Teams: Orienting & Focusing*

\*Prerequisite modules — Complete prior to beginning this module.

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## Additional Prerequisites

- *Using Leader Stories to Build Shared Vision and Commitment*
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## Related GLISI Modules

Using norms and covenants (ground rules and agreements that guide how a team works together) is a powerful way to orient a new team. It is strongly recommended that you work through *Leading a Team to Develop Norms and Covenants* soon after completing this module.

Additionally, you may wish to refer to these modules for reference while you work through this module:

- *Leading Teams Through Group Decision-making Processes*
  - *Leading Tactical Meetings*
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# Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"><li>• A group of individuals who have been selected and recruited to serve on a Better-seeking Team (BST)</li><li>• A school-based initiative for improvement that has been identified for further analysis</li></ul>	Orient and focus a new Better-seeking Team (BST)	<ul style="list-style-type: none"><li>• The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment</li><li>• GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment</li></ul>

# Module Introduction

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## **Orienting and Focusing**

As schools continue to make efforts to improve achievement for all students, it is important that everyone in the school is involved in the process through a collaborative approach. When an issue or an opportunity for improvement is identified, school leaders need to be able to identify a team of individuals with the expertise, experience, and value to address that improvement need or opportunity. Selecting, recruiting, orienting, and focusing individuals for a team to guide the improvement initiative is an important skill that promotes the success of the initiative.

Once you have recruited and selected team members to be part of the Better-seeking Team (BST), your next critical step is to get that team oriented and focused on the task at hand.

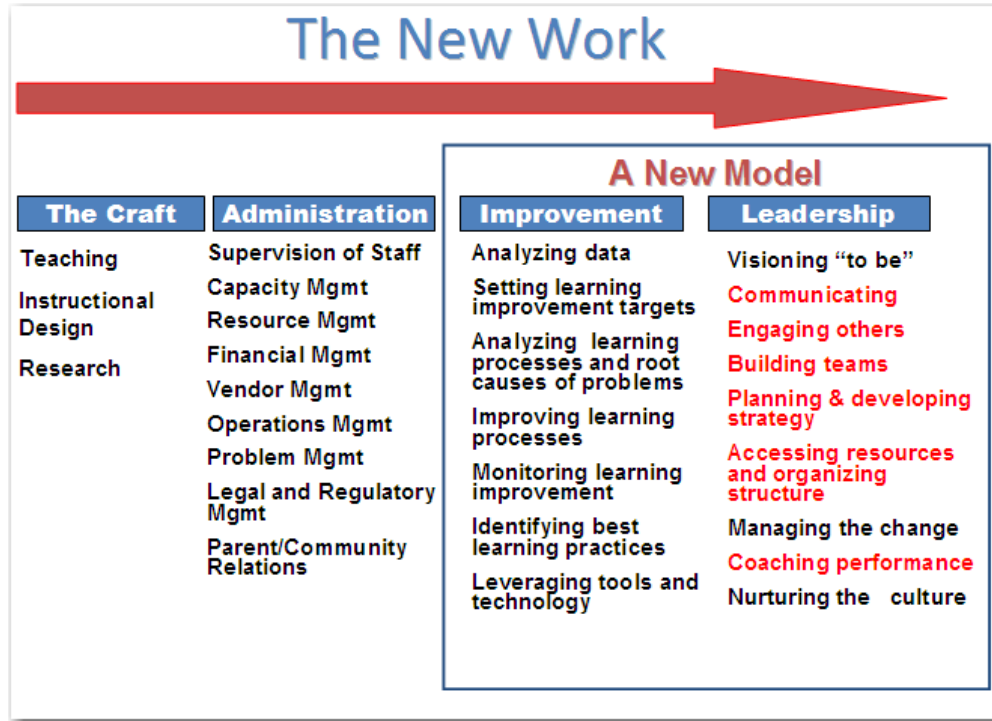
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## **Orienting and Focusing is Essential to Accomplishing the New Work**

The new work is focused on comprehensive school improvement. It takes educational professionals from a culture of working in individual silos to engaging a team's collective knowledge, experience, and skills for the improvement of the entire school community. The new work goes beyond the craft of teaching and the administration of the process. It also embraces process improvement components and leadership skills that are key to fostering a team-based culture of "better seekers," thus positively impacting dropout and graduation rates.

The new work is too complex for any principal, superintendent, or individual team member to accomplish alone. By engaging key stakeholders in this process you can focus and orient the BST to the desired outcome as quickly as possible. This will maximize the timeframe in which you are able to move the improvement initiative to implementation.

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**Ensuring Team-based Improvement through Orienting and Focusing**

As you learned in Module 1 of the Better-seeking Teams Series, Recruiting and Selecting, research has shown that increased stakeholder involvement is critical to school improvement. As the diagram on the following page illustrates, Team-based Improvement is one of three best practices that are essential to achieving desired results.

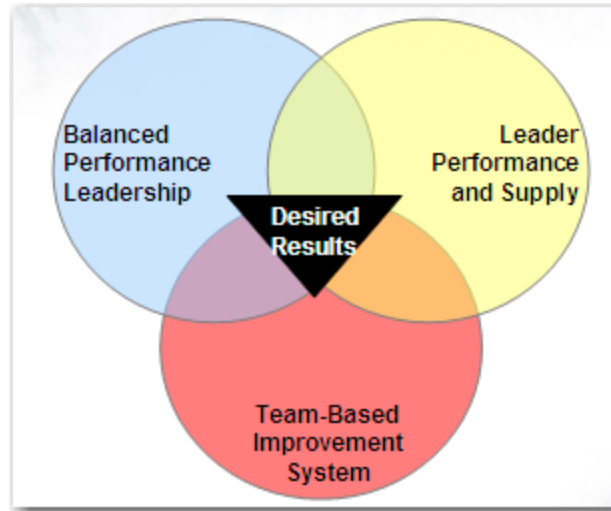
Those three components are:

- **Balanced Performance Leadership** – to plan, monitor, measure, and manage organizational and individual performance – and communicate needs and results to stakeholders
- **Leader Performance and Supply** – to maintain a pipeline of high-performing leaders at all levels and in all stakeholder groups
- **Team-based Improvement** – to leverage best practices and engage all stakeholders

*(Continued next page)*

**Ensuring Team-based Improvement through Orienting and Focusing**

The goal is to establish a culture of team-based improvement so that teams work together to solve problems and sustain success. Once your BST is recruited and selected, you must make a conscious effort to get them clearly oriented and focused on the task. This will ensure that they stay centered on the real issue and work toward the right resolutions.



## **Why is Orienting and Focusing Important?**

### What's in it for the leader?

- All key stakeholders are highly engaged.
- The team becomes familiar with the task more quickly and engages the issue at a faster pace.
- Ownership is transferred to the team for solving an identified school improvement initiative.
- The team gains a “laser-like focus” on an improvement initiative.
- A better-seeking culture and learning organization is created.
- The structure is provided to plan and execute all improvement initiatives.
- As a performance leader, you build credibility among your staff with the knowledge and skills to implement school improvement initiatives efficiently.

### What's in it for the other adults in the school/district?

- Consensus is cultivated among stakeholders regarding improvement initiatives.
- Teachers have an active influence on the outcomes of issues that matter for student achievement and learning.
- The appropriate mix of skill and talent is maximized for focusing on most impactful improvement needs.
- Teachers have a clear understanding of talents and resources available within their team.

### What's in it for students and student achievement?

- The classroom becomes more enriched.
  - Expectations and outcomes are clearly communicated.
-

**What are the Results of This Task?**

When this task is performed, you can expect the following results:

Tangible Results:

- Established processes and procedures for working together are developed.
- Trained teacher leaders provide leadership and support for the entire school.
- Rules and regulations for orienting and focusing BSTs are established.
- A manual is developed for orienting and focusing BSTs.
- Roles and responsibilities for each team member are defined.
- Goals and improvement efforts are defined and documented.
- Expressed trust among team members is evident as they work together.

Intangible Results:

- Buy-in and commitment from the team on school improvement initiatives are established.
  - Agreement and support from leadership and staff are granted.
  - Teachers and staff are empowered to improve processes and practices.
  - Improvement goals and initiatives have a greater chance of successful implementation.
  - The team is more focused on alignment of goals and improvement efforts.
  - Ownership and accountability for school improvement initiatives are created.
  - A culture of trust is evident throughout the organization.
  - An established team is trained to address local school issues.
-

**What is the Leader's Role?**

- Provide the focus and guide the activities for the orientation of the BST.
  - Direct the training and provide support and direction for the improvement initiatives.
  - Serve as the liaison between the school and the system and school board where appropriate for school initiatives.
- 

**Does Educational Context Matter?**

Educational context refers to characteristics of a given school or district, such as size, location (urban/suburban/rural), demographics (ethnic ratios, English as a second language), and socioeconomic status (free and reduced lunch ratios).

**No**, educational context does not matter – this task is performed the same way in all types of schools/districts.

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**Tip(s)**

- The improvement initiative should be one that impacts graduation rates, dropout rates, and student progression.
  - Space must be adequate for the team meeting.
  - All members of the team need to be in attendance.
  - The orienting and focusing process may require more than one meeting to complete.
- 

**Begin With the End in Mind**

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
  - Understand the standards (performance criteria) by which your performance will be assessed
  - Gauge your current level of performance against what will be expected of you by the end of the module
  - Prioritize which areas to concentrate on as you work through the module
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# Topic 1: Orienting the BST

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## **Orienting the BST**

The first step in getting a new BST oriented and focused is to give the participants the big picture about the improvement initiative that lies ahead.

You probably described the project to each member during the recruiting and selecting phase. However, your first meeting with the entire team provides the opportunity to describe the project in greater detail, in a setting where everyone on the team will hear the same message.

In this topic you will:

- Gather materials needed for the kick-off meeting and create an agenda
  - Use your leadership story to share your vision for this team-based improvement initiative
  - Get the BST clearly focused on the area needing further analysis
- 

## **Why Use Project Details to Orient and Focus the BST?**

When you conducted the initial steps of recruiting and selecting your BST members, your goal was to get the “the right people, on the right bus, in the right seats.” You now have a team populated with a strong leader, and with a diverse set of members that fulfill all of the skills and roles needed to accomplish the task. Your goal in this module is to get the right people who are now on the bus going in the right direction. Laying the foundation with the project details enables the team success because they have a clear understanding what tasks have to be accomplished on the project.

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**Using Your Leadership Story to Shape Team-based Improvement Success**

Noel Tichy researched common characteristics of winning organizations and found these organizations were led by leaders who were skilled in relating their leadership stories. Good leaders use story-telling to engage and energize others and to influence them to follow and respond accordingly.

You learned in the GLISI module, *Using Leadership Stories to Build Shared Commitment and Vision*, that there are three types of leadership stories. These leadership stories enable others to understand your fundamental views about school improvement, and your attitude about creating a culture of “better seekers”. They also allow the team to imagine the future. Who you are as a leader is:

- Shaped by what you have learned and experienced
- Rooted in your beliefs
- Often attributable to others who have mentored and influenced you

Your ability to communicate your leadership stories is a prerequisite for becoming a transformational leader. It is essential for getting your teams focused and oriented on the improvement initiative.

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**Using Teambuilding to Orient the BST**

Many teams are put together well and with the appropriate members. However, they do not succeed in their mission and goals because they lack the ability to work together as a cohesive team.

One of the most important tangible results of team interaction is the building of trust among team members. One of the intangible results is the culture of trust that can result throughout the organization. Trust makes it possible for each team member to carry out his/her role and to work within his /her belief system without fear of being ridiculed or intimidated by other team members.

The development of team interaction can be accomplished through any number of simple team-building activities. However, team interaction will not occur without a design. The more a team interacts, the deeper their interaction becomes.

Before you get your BST focused on the improvement initiative, devote some time to helping the BST get to fully know each other. Take time to plan and incorporate a team-building activity as part of orienting your BST. You can find many activity ideas and team-building guidelines by searching online or at your local library.

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**When Do I  
Begin This Task?  
(Cues)**

You begin this task once you have recruited and selected the members for this BST.

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**What Is the  
Leader's Role?**

Your role is to seize this preparation time as an opportunity. Make sure you have gathered and organized all the components necessary to get your BST jump-started with a clear directive.

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**What Resources  
are Required?**

- Completed Worksheets (or other working papers, if you created your own) used in the GLISI module, *Leading Better-seeking Teams: Recruiting & Selecting* (which provide information about why you selected the individuals on this team)
  - Your leadership stories you created in the GLISI module, *Using Leadership Stories to Build Shared Commitment and Vision*
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**How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
-

**Step-Action Table**

Step	Action
<b>1. Gather relevant materials</b>	<ul style="list-style-type: none"> <li>• Gather the following materials in order to prepare for this portion of your presentation to the team:               <ul style="list-style-type: none"> <li>○ Completed Worksheets (or other working papers, if you created your own) used in the GLISI module , <i>Leading Better-seeking Teams: Recruiting &amp; Selecting</i> (which provide information about why you selected the individuals on this team)</li> <li>○ Any initial documentation you reviewed that led you to choose this improvement initiative for further analysis.</li> </ul> </li> <li>• Use this information to pre-meditate your comments to the team. In addition, make copies of any documents you wish to share as handouts with the team.</li> </ul>
<b>2. Create an agenda</b>	<ul style="list-style-type: none"> <li>• Create an agenda for the kick-off session that includes items such as, but not limited to:               <ul style="list-style-type: none"> <li>○ Your Vision for Team Based Improvement</li> <li>○ Focus of the BST Meeting – Area of Need                   <ul style="list-style-type: none"> <li>– Desired results/outcomes of the project</li> <li>– The BST Task</li> </ul> </li> <li>○ The value within the team as it relates to the improvement initiative</li> <li>○ Team’s Professional Learning Needs</li> <li>○ Task Assignments</li> <li>○ Next Steps</li> </ul> </li> </ul>

Step	Action
<b>3. Welcome and introduce the team</b>	<ul style="list-style-type: none"> <li>• Welcome participants and distribute materials.</li> <li>• Have team members introduce themselves. Here are some ideas on how to conduct introductions:               <ul style="list-style-type: none"> <li>○ Have individuals introduce themselves by answering a set of questions that includes name, role, length of time in role – and one or two others such as why they want to serve on this team, tell about their first job in education, or one of their personal interests</li> <li>○ Ask a provocative question (perhaps topical to the purpose of the team, or about a current issue in education), give people time to write or draw a response, and instruct them to share their creation during their introduction</li> <li>○ Have people pair off, interview each other for a few minutes, and then introduce their partners</li> </ul> </li> <li>• Make sure you introduce yourself, too!</li> </ul>
<b>4. Share your leadership vision</b>	<ul style="list-style-type: none"> <li>• Highlight the key component of your leadership story that you want to use to reinforce the important work of team-based improvement.</li> </ul>
<b>5. Lead a team-building activity</b>	<ul style="list-style-type: none"> <li>• Choose a team-building activity by premeditating what you want the team to get out of the activity. Consider these questions:               <ul style="list-style-type: none"> <li>○ What response do you expect from the participants after the activity?</li> <li>○ What do you expect the participants to learn from the activity?</li> <li>○ How will you, as the leader, address a negative response from the group? A positive response from the group? Group members who choose not to participate?</li> <li>○ What strategy can you use to get the “pulse” of the group after the activity is completed?</li> </ul> </li> <li>• Lead the BST through a team-building activity to help them get to know one another.</li> </ul>

Step	Action
<b>6. Lead a debrief / reflection discussion</b>	<ul style="list-style-type: none"> <li>• Debrief the team’s experience with the team-building activity by asking questions that help the team discover how observations, interruptions, encouragement, body language, etc. can impact <u>team interaction and engagement</u>.</li> <li>• Lead the team in a discussion to identify both <u>enhancers and barriers to team interaction</u> - during the activity, and in the “real world.” <ul style="list-style-type: none"> <li>○ <b>Enhancers</b> contribute to the work of the team. For example, all members were encouraged to give input.</li> <li>○ <b>Barriers</b> deter team engagement. For example, some members did not participate in the activity.</li> </ul> </li> <li>• Ask the team to <u>relate the activity to their real-life tasks</u> – such as, to explain what action(s) they need to take regarding how they will interact in order to accomplish the tasks for the improvement initiative.</li> </ul>
<b>7. Introduce the improvement initiative</b>	<p>Tell the team about the improvement initiative, including:</p> <ul style="list-style-type: none"> <li>• The student achievement (or other) data that indicated a need for improvement and further analysis</li> <li>• The initial analysis that was used to identify the improvement need (if done yet – or, perhaps the BST will do this as one of their early activities)</li> <li>• How the team was formed</li> <li>• Any decisions that were made / directions that have been given by organizational leadership about how the project should be approached</li> <li>• Any other written documentation about the project that you wish to reference or share.</li> </ul> <p><b>Tip:</b> You are simply giving an overview of the project at this point. Save details about outcomes and steps / tasks for later in the conversation for later topics.</p>

Step	Action
<b>8. Reinforce each team member's value</b>	<ul style="list-style-type: none"><li>• Share your reasons for asking that person to join the team. Don't forget to speak about your own value!</li><li>• Refer back to your working papers from <i>Leading Better-seeking Teams: Recruiting &amp; Selecting</i>, particularly topics 1 and 2 and their practice worksheets.</li><li>• Share positive comments about <u>each person's</u>:<ul style="list-style-type: none"><li>○ Personal attributes</li><li>○ Work style</li><li>○ Values</li></ul></li><li>• Also describe specifically how each member contributes to the <u>team's need for</u>:<ul style="list-style-type: none"><li>○ Skills / experience</li><li>○ Knowledge</li><li>○ Resources</li><li>○ Time commitment</li><li>○ Job roles (teacher, principal, etc.)</li></ul></li></ul>

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
- 

### Practice Scenario

Conduct a meeting in which you will orient the BST. During this meeting you will:

- Welcome and introduce the team
- Share your leadership vision
- Help the BST members get to know each other using a team-building activity
- Introduce the improvement initiative
- Reinforce each team member's value regarding their involvement with the targeted improvement initiative

To conduct this practice you will identify two peers to help you with this Practice. Your volunteers should:

- Be people that you know well enough to be able to discuss their qualifications for a team role.
  - Act as themselves, using what they know about education and your organization to participate in the meeting.
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**Topic Practice Worksheet**

What materials (about the team and about the project) will you gather in order to plan your remarks to the team? Place a checkmark next to those you will use as handouts.

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What method will you use to have team members introduce themselves?

What key highlights will you share from your leadership stories to emphasize your commitment to team-based improvement?

What team-building activity will you incorporate to help the team members learn about one another? What questions will you use to debrief the activity?

**Topic Practice Worksheet**

What will you say to introduce the improvement initiative to the team?

Student achievement (or other data) showing need:

Initial “first look” review of improvement initiative performed to date:

Decisions / directions from leadership:

Other:

**Topic Practice Worksheet**

What comments do you wish to make about each team member (get information from your *Leading Better-seeking Teams: Recruiting & Selecting* worksheets; use back of page if more space needed):

Team Member	Personal Attributes, Work Style, Values	Skills / Experience, Knowledge, Resources, Time Commitment, Job Role

**Topic Practice Performance Checklist**

Select one:  Performer's self-assessment  Performance Coach's observations

Performer's Name: \_\_\_\_\_

Performance Coach's Name: \_\_\_\_\_

Date of Performance: \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Gathered relevant materials	<input type="checkbox"/> Completed Worksheets (or other working papers from <i>Leading Better-seeking Teams: Recruiting &amp; Selecting</i> ) are evident  <input type="checkbox"/> All documentation related to the improvement initiative you are leading	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Created an agenda	Agenda contains the following items <input type="checkbox"/> Your Vision for Team-based Improvement <input type="checkbox"/> Focus of the BST Meeting – Area of Need – Desired results/outcomes of the project – The BST Task <input type="checkbox"/> The value within the team as it relates to the improvement initiative <input type="checkbox"/> Team's Professional Learning Needs <input type="checkbox"/> Task Assignments <input type="checkbox"/> Next Steps	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
3. Welcomed and introduced the team	<input type="checkbox"/> Welcomed participants	<input type="checkbox"/> Yes
	<input type="checkbox"/> Distributed materials	<input type="checkbox"/> No
	<input type="checkbox"/> Incorporated a brief activity to help the team members introduce themselves	
4. Shared leadership vision	<input type="checkbox"/> Highlighted key components of their leadership story to reinforce the important work of team-based improvement.	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Facilitated a team-building activity	<input type="checkbox"/> Chose an appropriate team-building activity based on the intended outcome	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Effectively led a debrief and discussion of the team-building activity	
6. Introduced the improvement initiative	<input type="checkbox"/> A brief overview of the improvement initiative is given, including:	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> The student achievement (or other) data that indicated a need for improvement	
	<input type="checkbox"/> Any initial conversations that have taken place by organizational leadership about how the project should be approached	
	<input type="checkbox"/> Any other written documentation about the project to reference or share.	

Evidence	Criteria	Proficient? Give Feedback.
7. Reinforced each team members' value	<input type="checkbox"/> Shared positive comments about each person's personal attributes, work styles, and values  <input type="checkbox"/> Described each member's contribution regarding skills, knowledge, resources, and time commitment	<input type="checkbox"/> Yes <input type="checkbox"/> No

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## Topic 2: Focusing the BST on Team Roles

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### **Focusing on Team Roles**

Common sense suggests that engaging the skills, experience, and talents of each team member and a critical mass of stakeholders is crucial to leading the improvement of graduation rates, dropout rates and student progression. So why isn't common sense common practice? The answer maybe that people don't know their value or don't understand the value others bring.

You have gathered the talent, experience, and skill you need to accomplish the task. Now is the time to guide your team in assessing the roles and value added by individual BST members.

In this topic you will:

- Guide each team member to determine the individual value they bring to the BST
- Determine team coverage for the 8 Roles of School Leaders™ with the BST

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### **The 8 Roles of School Leaders™**

In Module 1: Recruiting and Selecting, team members became aware of their individual strengths and areas of opportunity as a leader. Now, as they gather as a BST, it is important that they thoroughly understand how their leadership roles fit within the rest of the team. Knowledge of these job roles, and the Priority Performances related to each, will likely be vital to the team's ability to assign tasks across members so that each can contribute their strengths to the efforts.

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### **When Do I Begin This Task? (Cues)**

You start this immediately after you have introduced the project to the team, and the team members are introduced to each other.

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### **What Is the Leader's Role?**

Your role is to ensure that common sense become common practice. You will guide your BST through the process of taking what they know about the 8 Roles of School Leaders™ and use it to maximize their effectiveness as a team

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**What Resources  
are Required?**

- Each team member's completed copy of the 8 Roles of School Leaders™ Assessment
  - Copies of *Your Team(s): Are All 8 Roles Covered?* (Found in Appendix A)
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**How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
-

**Step-Action Table**

Step	Action
<p><b>1. Review the 8 Roles of School Leaders™</b></p>	<ul style="list-style-type: none"> <li>• Review the 8 Roles of School Leaders™ with the BST.</li> <li>• Give a brief overview of the 8 Roles of School Leaders™ Assessment and instruct the BST to pull out their copy of the assessment that they completed.</li> </ul>
<p><b>2. Encourage each BST member to share the value that they bring to BST</b></p>	<ul style="list-style-type: none"> <li>• As a group, direct each team member to share and discuss their results of their 8 Roles of School Leaders™ Assessment. Have each team member share the value they bring to the BST. They should reflect on their value to the BST as it relates to the improvement initiative by answering the following questions.            Of all the roles I checked:           <ul style="list-style-type: none"> <li>○ Which role would I most like to lead on our BST?</li> <li>○ What is my perceived strength?</li> <li>○ What is my area of opportunity?</li> <li>○ How will I apply my role strength on the BST to accomplish the goals of the identified improvement need?</li> </ul> </li> <li>• Based on the BST's knowledge of this team member, encourage discussion regarding the roles that they have mentioned.</li> <li>• Talk about your own roles and solicit any feedback from the team regarding any other roles they feel you should take on to help them success</li> </ul> <p><b>Tip:</b> You may wish to rotate team roles over time in order to share responsibilities and foster professional learning. In this case, identify those who will fill the roles first, and agree upon the time period for which they will serve; repeat the process when the time period is up</p>

Step	Action
<b>3. Determine team coverage of the 8 Roles of School Leaders™</b>	<ul style="list-style-type: none"><li>• Using the <i>Your Team(s) – Are All 8 Roles Covered?</i> (found in Appendix A), have a recorder enter each team members' name into the column that corresponds to their level of mastery in each of The 8 Roles of School Leaders™.</li><li>• Conduct a meaningful conversation around the following questions:<ul style="list-style-type: none"><li>○ Are all of the 8 Roles of School Leaders™ covered by the current membership of our team? If not, what are we going to do about it?</li><li>○ Are there people on the team who can grow into one or more of the 8 Roles of School Leaders™ over time? If so, brainstorm on learning opportunities that can facilitate and speed up that process.</li></ul></li></ul>

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
- 

### Practice Scenario

Conduct a meeting in which you will focus the BST on team roles. During this meeting you will:

- Review the 8 Roles of School Leaders™
- Encourage each BST member to share their value they bring to the BST
- Determine team coverage of the 8 Roles of School Leaders

Using the same colleagues who volunteered for Topic Practice #1, have them continue to take on the roles of your BST members.

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**Topic Practice Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Review the 8 Roles of School Leaders™	<input type="checkbox"/> Reviewed the 8 Roles of School Leaders™ with the BST	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Determine the value that each member brings to BST	<input type="checkbox"/> Directed each team member to share and discuss their results related to the following: <ul style="list-style-type: none"> <li>– Which role would I most like to lead on our BST?</li> <li>– What is my perceived strength?</li> <li>– What is my area of opportunity?</li> <li>– How will I apply my role / strength on the BST to accomplish the goals of the identified improvement need?</li> </ul> <input type="checkbox"/> Shared own roles and solicited feedback regarding other roles team feels are necessary to take on to help them succeed	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Determine team coverage of the 8 roles	<input type="checkbox"/> Determined that the 8 Roles of School Leaders™ are covered sufficiently	<input type="checkbox"/> Yes <input type="checkbox"/> No

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# Topic 3: Focusing the BST on Professional Learning

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## **Selecting Professional Learning to Support Improvement Initiative**

Well-selected, well-oriented, and well-focused teams can still fail to meet their goals if they lack the knowledge and skills they need to perform the school improvement initiative task(s). Introducing professional learning early in the process can help provide focus that will enable the team to achieve success.

In this topic, you will identify professional learning needs based on the improvement initiative, identified team knowledge and skill building opportunities

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## **Two Types of Professional Learning**

There are two types of professional learning to provide to a new BST in order to make sure they are equipped to produce results:

- Information / activities that provide knowledge and skills related to school leadership in general (such as GLISl's 8 Roles of School Leaders™)
  - Information / activities that provide knowledge and skills specific to the initiative's tasks / goals
-

**Initiative-related  
Professional  
Learning**

In deciding what initiative-related professional learning to provide to the BST, remember that the important thing is that the BST member knows how to operate most effectively in his or her job role and area of responsibility to address the primary issues of the school improvement task.

The team will be responsible for using the data and documentation to identify the problem, define what the desired results look like when successfully met, and then to identify an effective plan of action to meet the desired results. The professional learning that is provided must address any part of the process where team members lack understanding or are unable to perform, such as analysis of data or methods for effectively developing school improvement /action plans.

Appropriate professional development related to the initiative is provided to:

- Train staff in the value that each brings to the task
- Train staff in effective strategies for improvement in the identified area of need
- Target direct, guided, and meaningful instruction for staff
- Insure relevancy to the specific initiative identify research-based strategies

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**When Do I  
Begin This Task?  
(Cues)**

You begin this task once you have completed the 8 Roles of School Leaders™ Assessment with the BST and determined what role coverage is needed.

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**What Is the  
Leader's Role?**

Your role is to assist the BST in figuring out the level of professional development needed and providing access to the identified professional development resources.

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**How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
-

**Step-Action Table**

Step	Action
<p><b>1. Determine the professional learning needs</b></p>	<ul style="list-style-type: none"> <li>• Based on the 8 Roles of School Leaders™, guide the team to brainstorm the collective and individual professional development needed in order to accomplish the strategies and tasks to support the improvement initiative.</li> <li>• Consider the following questions:                             <ul style="list-style-type: none"> <li>○ Based on the data from the 8 Roles of School Leaders™, what does the team need to be led to do?</li> <li>○ What must we know (knowledge) and be able to do (skills) in order to meet the goal?</li> <li>○ What strategies will need to be implemented in order to achieve the goal?</li> </ul> </li> </ul> <p><b>Example:</b> Based on the group results from the 8 Roles of School Leaders™ Assessment, and the discussion, the team says, “This process is great...except that we don’t know how to analyze data or analyze causes, etc.” This discovery from the assessment would lead to the training that would provide support for the team in the area of Professional Learning. The team member with the strength in a given role, such as data analysis, would either lead the team or provide the leadership for securing the training.</p>
<p><b>2. Brainstorm professional learning content needed to achieve success</b></p>	<ul style="list-style-type: none"> <li>• Based on the needs identified in the previous activity, brainstorm what professional learning <u>content</u> the BST members need that meets these criteria:                             <ul style="list-style-type: none"> <li>○ Provide targeted, direct, meaningful instruction related to the improvement initiative</li> <li>○ Are relevant to the specific initiative</li> </ul> </li> <li>• Include research-based strategies that have proven effective in situations relevant to the specific initiative</li> </ul>

Step	Action
<p><b>3. Prioritize the professional learning needs</b></p>	<ul style="list-style-type: none"> <li>• Using the brainstormed list of professional learning content, prioritize the BST needs in the order of importance. As you prioritize, ask the following questions:               <ul style="list-style-type: none"> <li>○ Which professional learning needs will have the highest impact on our success in reaching the desired outcome?</li> <li>○ In which professional learning content areas does our team lack the most skill and need guidance immediately?</li> </ul> </li> </ul>
<p><b>4. Brainstorm professional learning delivery methods</b></p>	<ul style="list-style-type: none"> <li>• For each professional learning content area, brainstorm a variety of <u>types</u> (delivery methods) of professional learning opportunities that can deliver the necessary content – including, but not limited to:               <ul style="list-style-type: none"> <li>○ Direct instruction (e.g. in a BST meeting)</li> <li>○ Reading (books, journals) and resources (videos, etc.)</li> <li>○ Experiences (field trips, shadowing, data collection, etc.)</li> </ul> </li> </ul>
<p><b>5. List any details to make sure the professional learning happens</b></p>	<ul style="list-style-type: none"> <li>• List any details the BST will need to accomplish to make the professional learning happen.</li> <li>• Decide who among the BST is responsible for any further research or steps to bring the professional learning to reality.</li> <li>• Using your schedule, list such items as:               <ul style="list-style-type: none"> <li>○ The Professional learning need</li> <li>○ Delivery method for the professional learning need</li> <li>○ Who will own making that professional learning need happen</li> <li>○ Completion deadline</li> </ul> </li> </ul> <p><b>Tip:</b> Work with the professional learning team in your organization to schedule the opportunities for your team. You may provide some professional learning during the team’s initial meeting(s), but the overall program will probably continue over time.</p>

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
- 

### Practice Scenario

Conduct a meeting in which you will focus the BST on Professional Learning. During this meeting you will:

- Review the 8 Roles of School Leaders™ and establish professional learning needs
- Prioritize the professional learning needs
- Establish a schedule for making the professional learning needs happen

Using the same colleagues who volunteered for Topic Practices #1 and #2, have them continue to take on the roles of your BST members.

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**Topic Practice Worksheet**

Which 8 Roles of School Leaders™ assessment is appropriate for your audience / initiative?

School-level       District-level

What will we employ on this improvement initiative?	What professional learning <b>content</b> could be related?	What <b>delivery methods</b> could be used (describe)?
<u>Knowledge</u>		<input type="checkbox"/> Direct instruction <input type="checkbox"/> Reading <input type="checkbox"/> Resources <input type="checkbox"/> Experiences
<u>Skills</u>		<input type="checkbox"/> Direct instruction <input type="checkbox"/> Reading <input type="checkbox"/> Resources <input type="checkbox"/> Experiences

Review your work and confirm whether your ideas meet these criteria:

<input type="checkbox"/> Targeted	<input type="checkbox"/> Direct / Relevant	<input type="checkbox"/> Meaningful	<input type="checkbox"/> Research-based
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**Topic Practice Worksheet**

List any details regarding the targeted professional learning, how it will happen, and when.

Professional Learning Need	Selected Delivery Method	Owner	Completion Date
	<input type="checkbox"/> Direct instruction  <input type="checkbox"/> Reading  <input type="checkbox"/> Resources  <input type="checkbox"/> Experiences		
	<input type="checkbox"/> Direct instruction  <input type="checkbox"/> Reading  <input type="checkbox"/> Resources  <input type="checkbox"/> Experiences		
	<input type="checkbox"/> Direct instruction  <input type="checkbox"/> Reading  <input type="checkbox"/> Resources  <input type="checkbox"/> Experiences		

**Topic Practice Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Determined professional learning needs	<input type="checkbox"/> Guided the team to identify professional learning needs specific to achieving the improvement initiative regarding required knowledge and skills	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Brainstormed what professional learning <u>content</u> the BST members need, that meets these criteria:	
	<input type="checkbox"/> Included research-based strategies proven effective in situations relevant to the specific initiative	
	<input type="checkbox"/> Prioritized the BST needs in the order of importance	
	<input type="checkbox"/> Brainstormed <u>types</u> (delivery methods) of professional learning opportunities that can deliver the necessary content	
2. Listed any details to make sure the professional learning happens	<input type="checkbox"/> Listed any detail BST will need to accomplish to make the professional learning happen	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Decided who among the BST is responsible for any further research or steps to bring the professional learning to reality	

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# Topic 4: Focusing the BST on Team Assignments

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## Focusing on the BST Around Team Assignments

You now have a BST with individuals who bring the right mix of skills and talents. Your team has developed a focus, team cohesion, and norms for working together.

In this topic, you will:

- Identify the tasks that the team will complete in order to accomplish the goals of the improvement initiative
- Assign tasks to the team

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## When Do I Begin This Task? (Cues)

You begin this task once you have introduced the BST and the task at hand, assessed team roles, and identified professional learning opportunities

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## What Is the Leader's Role?

Your role is to make sure each team member is clear as to his or her individual and team assignments they will undertake as it relates to the improvement initiative.

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## Tip(s)

- Make sure each member of the team contributes to the task discussion
  - Ensure that each team member is assigned to at least one task
  - Set the example by volunteering for one of the tasks
  - Assign large tasks to two or more team members as appropriate (or break the task into multiple sub-tasks)
  - Give a copy of the assignments and dates for assessment meetings to each team member
-

**How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
-

**Step-Action Table**

Step	Action
<p><b>1. Identify desired outcomes</b></p>	<ul style="list-style-type: none"> <li>• As a group, identify one or more desired outcomes / results for the initiative. Ask: What will a successful initiative look like when it is completed?</li> <li>• Consider all types of outcomes / results that might be appropriate for this project, tangible and intangible, including but not limited to:               <ul style="list-style-type: none"> <li>○ Data analysis completed</li> <li>○ Cause analysis completed</li> <li>○ Research completed</li> <li>○ Reports written</li> <li>○ Changes in organization policies, procedures, schedules</li> <li>○ Communication with others in the organization</li> <li>○ Professional learning for others in the organization</li> <li>○ Changes in behavior (student or adult)</li> <li>○ Changes in organizational culture</li> </ul> </li> </ul> <p><b>Tip:</b> If appropriate, use processes for group discussion and decision-making (brainstorming, multi-voting, etc.) to generate ideas and then decide on a final list. (Refer to GLISI module <i>Leading a Team Through Group Decision-making.</i>)</p> <p><b>Tip:</b> You may also wish to format desired outcomes as SMART Goals - that is, described in statements that are Specific, Measurable, Attainable, Relevant, and Time-oriented. (Refer to GLISI module <i>Leading a Team to Develop SMART Goals.</i>)</p>
<p><b>2. Identify tasks needed to reach desired results/ outcomes</b></p>	<ul style="list-style-type: none"> <li>• Facilitate a discussion in which the team generates a list of tasks that are necessary to move toward desired outcomes. Explain that this may be a list of only initial tasks in the process, and that as a team you may repeat this step again later in the project.</li> <li>• Agree as a team on a final list of tasks</li> </ul>

Step	Action
<p><b>3. Assign and document tasks</b></p>	<ul style="list-style-type: none"> <li>• Encourage each team member to volunteer for identified tasks. As the leader, model desired behavior for volunteering for one or more tasks. (However, allow / encourage other members of the team to select tasks before you do, if possible).</li> <li>• Assign tasks that are left over. Ensure that each member of the BST has responsibility for some aspect of the project.</li> <li>• Assign larger tasks to two or more individuals, and encourage BST members to call on each other for assistance with their tasks.</li> <li>• Match the team members' skills, preferences, and abilities to their tasks where appropriate and possible.</li> <li>• Document the tasks as part of the meeting records to make sure they are formally noted.</li> </ul> <p><b>Tip:</b> If the BST has already had training in The 8 Roles of School Leaders™, also consider their assessment results when making task assignments. (See Topic 3, Using Professional Learning to Focus the BST).</p> <ul style="list-style-type: none"> <li>• Capture details related to the final tasks. You may choose to create a template on a flip chart, white board, or with a computer / projector. It should be something you (or a scribe on the team) can update in “real time” during this discussion with your team.</li> </ul> <p>Your format should include items such as:</p> <ul style="list-style-type: none"> <li>○ Name of task</li> <li>○ Person(s) assigned</li> <li>○ Dates / time frame (start and stop, status checkpoints)</li> <li>○ Resources needed (people, materials, time, money)</li> </ul>
<p><b>4. Set next meetings</b></p>	<ul style="list-style-type: none"> <li>• Remind everyone that the team needs to meet regularly to give task progress reports.</li> <li>• Develop a list of dates for future meetings (on the flip chart or board). Be sure to work around key dates on the organizational calendar (testing dates, teacher work days, official holidays, etc.)</li> </ul>
<p><b>5. Close the discussion</b></p>	<ul style="list-style-type: none"> <li>• Thank BST members for their participation, and describe the value they added by actively adding to this discussion.</li> <li>• Inform team members “by when” you will be sending the task assignments and other documentation from the meeting to them.</li> </ul>
<p><b>6. Follow up</b></p>	<p>Send out documentation by the date to which you committed.</p>

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
- 

### Practice Scenario

Conduct a meeting where you focus the BST on team assignments. During the meeting, you will:

- Identify the desired outcomes
- Identify and assigns tasks needed to reach desired results
- Set next steps

Using the same volunteers from your previous topic practices #1-3, have them continue in their roles as BST members.

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**Topic Practice Worksheet**

Briefly describe the improvement initiative to be discussed.

What is your understanding of the desired outcomes / results of this improvement initiative?

What tasks do you (as the leader) expect that the BST must undertake in order to meet the desired outcomes / results of the project? And which team members would you like to see assigned to each of the tasks?

Task	Assigned To

**Topic Practice Worksheet**

Capture additional details related to each task.

Task	Resources Needed	Completion Date

Determine how often you wish for the BST to meet going forward. Identify “block-out dates” on which the team should not meet based on the organizational calendar. Premeditate any dates you would like to suggest to the team.

Premeditate how you would like to close the discussion.

**Topic Practice Performance Checklist**

**Select one:**    Performer's self-assessment    Performance Coach's observations

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. Identified desired outcomes	<input type="checkbox"/> Considered all types of outcomes that are appropriate for the project	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Identified steps needed to reach desired results/outcomes	<input type="checkbox"/> Facilitated discussion which generates a list of tasks <input type="checkbox"/> Brings group to consensus regarding the tasks necessary to reach the final outcome	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Assigned and documented tasks	<input type="checkbox"/> Encouraged members to volunteer for tasks <input type="checkbox"/> Assigned tasks to appropriate team members <input type="checkbox"/> Documented tasks capturing details such as <ul style="list-style-type: none"> <li>– Tasks Assigned</li> <li>– Persons Assigned to Task</li> <li>– Date/Times</li> <li>– Resources Needed</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 4: Focusing the BST on Team Assignments  
Leading Better-seeking Teams: Orienting & Focusing

Evidence	Criteria	Proficient? Give Feedback.
4. Set next meeting	<input type="checkbox"/> Developed dates for next meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Closed the discussion	<input type="checkbox"/> Thanked BST members for their time and involvement <input type="checkbox"/> Informed BST members of next steps	<input type="checkbox"/> Yes <input type="checkbox"/> No

# Final Practice

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## Instructions

- Perform this practice, referring to the topic step-action tables as needed.
  - Complete the Final Practice Worksheet, listing results that are realistic based on the information in the practice scenario.
  - Check your work.
  - Meet with your Performance Coach to review the results and decide what to do next.
  - Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
    - Communicating the time and location of the meeting to the participants in advance
    - Preparing and providing copies of a meeting agenda
    - Being prepared with all the necessary materials and resources
-

**Practice Scenario**

Conduct a meeting where you will orient and focus a BST on an identified improvement initiative. Facilitate the team through all four techniques for focusing and orienting:

- Orient the BST
- Focusing them on their team roles
- Focus them on Professional Learning opportunities
- Focus them on team assignments

Recruit a small group of volunteers to help you with this Final Practice. Ideally, these will be two to four people who are on your real BST, but not the whole team. (If you cannot use members of your real BST, use people who serve on another team with you). Advise your volunteers to “play themselves” in the scenario of being introduced to a new team, for a new project, for the first time.

Ideally, you will practice using the real improvement initiative for which you will assemble a BST.

Have your Coach observe the meeting, and retain artifacts from the meeting.

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**Final Practice Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. Gathered relevant materials	<input type="checkbox"/> Completed Worksheets (or other working papers) from <i>Leading Better-seeking Teams: Recruiting &amp; Selecting</i> are evident	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Gathered all documentation related to the targeted improvement initiative	
2. Created an agenda	Agenda contains the following items	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Your Vision for Team-based Improvement	
	<input type="checkbox"/> Focus of the BST Meeting – Area of Need	
	– Desired results/outcomes of the project	
	– The BST Task	
	<input type="checkbox"/> The value within the team as it relates to the improvement initiative	
	<input type="checkbox"/> Team’s Professional Learning Needs	
<input type="checkbox"/> Task Assignments		
<input type="checkbox"/> Next Steps		

Evidence	Criteria	Proficient? Give Feedback.
3. Welcomed and introduced the team	<input type="checkbox"/> Welcomed participants	<input type="checkbox"/> Yes
	<input type="checkbox"/> Distributed materials	<input type="checkbox"/> No
	<input type="checkbox"/> Incorporated a brief activity to help the team members introduce themselves	
4. Shared leadership vision	<input type="checkbox"/> Highlighted key components of their leadership story to reinforce the important work of team-based improvement.	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Facilitated a team-building activity	<input type="checkbox"/> Chose an appropriate team-building activity based on the intended outcome	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Effectively led a debrief and discussion of the team-building activity	
6. Introduced the improvement initiative	<input type="checkbox"/> Gave a brief overview of the improvement initiative including:	<input type="checkbox"/> Yes <input type="checkbox"/> No
	– The student achievement (or other) data that indicated a need for improvement	
	– Any initial conversations have taken place by organizational leadership about how the project should be approached	
	– Any other written documentation about the project to reference or share.	

Evidence	Criteria	Proficient? Give Feedback.
7. Reinforced each team members' value	<input type="checkbox"/> Shared positive comments about each person's personal attributes, work styles, and values  <input type="checkbox"/> Described each members' contribution regarding skills, knowledge, resources, and time commitment	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Reviewed the 8 Roles of School Leaders™	<input type="checkbox"/> Reviewed the 8 Roles of School Leaders™ with the BST	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Determined the value that each member brings to BST	<input type="checkbox"/> Directed each team member to share and discuss their results related to the following: <ul style="list-style-type: none"> <li>– Which role would I most like to lead on our BST?</li> <li>– What is my perceived strength?</li> <li>– What is my area of opportunity?</li> <li>– How will I apply my role strength on the BST to accomplish the goals of the identified improvement need?</li> </ul> <input type="checkbox"/> Shared own roles and solicited feedback regarding other roles team feels are necessary to take on to help them success	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Determined team coverage of the 8 Roles	<input type="checkbox"/> Determined that the 8 Roles of School Leaders™ are covered sufficiently	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. Determined professional learning needs	<input type="checkbox"/> Guided the team to identify professional learning needs specific to achieving the improvement initiative regarding required knowledge and skills  <input type="checkbox"/> Brainstormed what professional learning <u>content</u> the BST members need, that meets these criteria:  <input type="checkbox"/> Included research-based strategies proven effective in situations relevant to the specific initiative  <input type="checkbox"/> Prioritized the BST needs in the order of importance  <input type="checkbox"/> Brainstormed <u>types</u> (delivery methods) of professional learning opportunities that can deliver the necessary content	<input type="checkbox"/> Yes  <input type="checkbox"/> No
12. Listed any details to make sure the professional learning happens	<input type="checkbox"/> Listed any detail BST will need to accomplish to make the professional learning happen  <input type="checkbox"/> Decided who among the BST is responsible for any further research or steps to bring the professional learning to reality	<input type="checkbox"/> Yes  <input type="checkbox"/> No
13. Identified desired outcomes	<input type="checkbox"/> Considered all types of outcomes that are appropriate for the project	<input type="checkbox"/> Yes  <input type="checkbox"/> No
14. Identified steps needed to reach desired results/outcomes	<input type="checkbox"/> Facilitated discussion which generates a list of tasks  <input type="checkbox"/> Brings group to consensus regarding the tasks necessary to reach the final outcome	<input type="checkbox"/> Yes  <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
15. Assigned and documented tasks	<input type="checkbox"/> Encouraged members to volunteer for tasks <input type="checkbox"/> Assigned tasks to appropriate team members <input type="checkbox"/> Documented tasks capturing details such as <ul style="list-style-type: none"> <li>– Tasks Assigned</li> <li>– Persons Assigned to Task</li> <li>– Date/Times</li> </ul> <input type="checkbox"/> Resources Needed	<input type="checkbox"/> Yes <input type="checkbox"/> No
16. Set next meeting	<input type="checkbox"/> Developed dates for next meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No
17. Closed the discussion	<input type="checkbox"/> Thanked BST members for their time and involvement <input type="checkbox"/> Informed BST members of next steps	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i>	<b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i>	<b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i>	<b>Distinguished</b> Could be Used as a Model to Teach Others

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

# Final Assessment

## When Can I Take the Final Assessment?

Complete the Final Assessment when you are able to sufficiently execute the module’s performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

## When Can I Add the Final Assessment to My Portfolio?

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

Yes	No
<p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> <li>• Final Assessment Performance Checklist</li> <li>• Final Assessment Feedback Form</li> <li>• Module Progress Tracker page</li> <li>• Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc.</li> </ul>	<p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> <li>• Obtain performance feedback from your Performance Coach</li> <li>• Review relevant topics in the module</li> <li>• Repeat Topic Practices and/or the Final Practice</li> <li>• Pursue additional learning, training and experience</li> </ul>

**Final Assessment  
Instructions**

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
  2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
  3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
  4. Review the following with your Performance Coach:
    - Task-related criteria on the Final Assessment Performance Checklist
    - Cross-cutting leadership skills on the Performance Feedback Form
    - Final Assessment Scenario (on the next page)
  5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
  6. Perform the Final Assessment as follows:
    - In a real school or district setting
    - With a team of teachers, staff, or other leaders as appropriate
    - Observed by your Performance Coach
  7. Retain artifacts from your performance (documents, slides, etc.)
  8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.
-

**Final Assessment  
Scenario**

As the leader\* of an improvement initiative in your school, you have already taken the first step of recruiting and selecting a BST to assist you with the project. Your next task is to orient and focus the seated BST on improvement initiative and their roles and responsibilities.

Assemble your new BST and facilitate them through a meeting in which you work through all four techniques for orienting and focusing.

- Introducing the project to the team
- Focusing them around their team roles
- Discerning the professional learning opportunities and make team assignment.
- Focusing the BST around team assignments

Have your Coach observe the meeting. Also, retain artifacts from the meeting.

\*NOTE: If you are not the leader of a real BST, work with your Coach to identify a real-school, real-time school team who can help you work through this Final Assessment.

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**Final Assessment Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. Gathered relevant materials	<input type="checkbox"/> Completed Worksheets (or other working papers) from <i>Leading Better-seeking Teams: Recruiting &amp; Selecting</i> are evident	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Gathered all documentation related to the targeted improvement initiative	
2. Created an agenda	Agenda contains the following items	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Your Vision for Team-based Improvement	
	<input type="checkbox"/> Focus of the BST Meeting – Area of Need	
	– Desired results/outcomes of the project	
	– The BST Task	
	<input type="checkbox"/> The value within the team as it relates to the improvement initiative	
<input type="checkbox"/> Team’s Professional Learning Needs		
<input type="checkbox"/> Task Assignments		
<input type="checkbox"/> Next Steps		

Evidence	Criteria	Proficient? Give Feedback.
3. Welcomed and introduced the team	<input type="checkbox"/> Welcomed participants	<input type="checkbox"/> Yes
	<input type="checkbox"/> Distributed materials	<input type="checkbox"/> No
	<input type="checkbox"/> Incorporated a brief activity to help the team members introduce themselves	
4. Shared leadership vision	<input type="checkbox"/> Highlighted key components of their leadership story to reinforce the important work of team-based improvement.	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Facilitated a team-building activity	<input type="checkbox"/> Chose an appropriate team-building activity based on the intended outcome	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Effectively led a debrief and discussion of the team-building activity	
6. Introduced the improvement initiative	<input type="checkbox"/> Gave a brief overview of the improvement initiative including:	<input type="checkbox"/> Yes <input type="checkbox"/> No
	– The student achievement (or other) data that indicated a need for improvement	
	– Any initial conversations have taken place by organizational leadership about how the project should be approached	
	– Any other written documentation about the project to reference or share.	

Evidence	Criteria	Proficient? Give Feedback.
7. Reinforced each team members' value	<input type="checkbox"/> Shared positive comments about each person's personal attributes, work styles, and values  <input type="checkbox"/> Described each members' contribution regarding skills, knowledge, resources, and time commitment	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Reviewed the 8 Roles of School Leaders™	<input type="checkbox"/> Reviewed the 8 Roles of School Leaders™ with the BST	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Determined the value that each member brings to BST	<input type="checkbox"/> Directed each team member to share and discuss their results related to the following: <ul style="list-style-type: none"> <li>– Which role would I most like to lead on our BST?</li> <li>– What is my perceived strength?</li> <li>– What is my area of opportunity?</li> <li>– How will I apply my role strength on the BST to accomplish the goals of the identified improvement need?</li> </ul> <input type="checkbox"/> Shared own roles and solicited feedback regarding other roles team feels are necessary to take on to help them success	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Determined team coverage of the 8 Roles	<input type="checkbox"/> Determined that the 8 Roles of School Leaders™ are covered sufficiently	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. Determined professional learning needs	<input type="checkbox"/> Guided the team to identify professional learning needs specific to achieving the improvement initiative regarding required knowledge and skills  <input type="checkbox"/> Brainstormed what professional learning <u>content</u> the BST members need, that meets these criteria:  <input type="checkbox"/> Included research-based strategies proven effective in situations relevant to the specific initiative  <input type="checkbox"/> Prioritized the BST needs in the order of importance  <input type="checkbox"/> Brainstormed <u>types</u> (delivery methods) of professional learning opportunities that can deliver the necessary content	<input type="checkbox"/> Yes  <input type="checkbox"/> No
12. Listed any details to make sure the professional learning happens	<input type="checkbox"/> Listed any detail BST will need to accomplish to make the professional learning happen  <input type="checkbox"/> Decided who among the BST is responsible for any further research or steps to bring the professional learning to reality	<input type="checkbox"/> Yes  <input type="checkbox"/> No
13. Identified desired outcomes	<input type="checkbox"/> Considered all types of outcomes that are appropriate for the project	<input type="checkbox"/> Yes  <input type="checkbox"/> No
14. Identified steps needed to reach desired results/outcomes	<input type="checkbox"/> Facilitated discussion which generates a list of tasks  <input type="checkbox"/> Brings group to consensus regarding the tasks necessary to reach the final outcome	<input type="checkbox"/> Yes  <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
15. Assigned and documented tasks	<input type="checkbox"/> Encouraged members to volunteer for tasks <input type="checkbox"/> Assigned tasks to appropriate team members <input type="checkbox"/> Documented tasks capturing details such as <ul style="list-style-type: none"> <li>– Tasks Assigned</li> <li>– Persons Assigned to Task</li> <li>– Date/Times</li> </ul> <input type="checkbox"/> Resources Needed	<input type="checkbox"/> Yes <input type="checkbox"/> No
16. Set next meeting	<input type="checkbox"/> Developed dates for next meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No
17. Closed the discussion	<input type="checkbox"/> Thanked BST members for their time and involvement <input type="checkbox"/> Informed BST members of next steps	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i>	<b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i>	<b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i>	<b>Distinguished</b> Could be Used as a Model to Teach Others

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

# Appendix A: Your Team(s) - Are All 8 Roles Covered?

The 8 Roles of School Leaders™ – Team Coverage Assessment			
Team Name:			
Assessment Date:			
<b>Team Coverage Guidelines</b> <ul style="list-style-type: none"> <li>If no one scores 3-4 on a role, get support from another individual in your school/district</li> </ul>	<ul style="list-style-type: none"> <li>Can serve as leaders in this role</li> <li>Can serve as mentors for others still developing in this role</li> </ul>	<ul style="list-style-type: none"> <li>2+ members can work together as co-leaders in this role, if no 4's are available</li> <li>All at this level should pursue learning/experience in this role</li> </ul>	<ul style="list-style-type: none"> <li>Should not serve as a leader in this role at this time</li> <li>May pursue learning/experience if desire future leadership in this role</li> </ul>
Leadership Role in the "New Work"	Team member(s) at Level 4	Team Member(s) at Level 2 – 3	Team Member(s) at Level 1
Curriculum, Assessment & Instruction Leader			
Data Analysis Leader			
Process Improvement Leader			
Learning & Performance Development Leader			
Relationship Leader			
Performance Leader			
Operations Leader			
Change Leader			

# Recommended Reading and Resources

Blanchard, K., et al. (2000). *High Five*. William Morrow and Company.

Donnellon, A. (1996). *Team Talk: The Power of Language in Team Dynamics*. Boston, MA: Harvard Business School Press.

Dufour, R. (2002). *The Learning Principal*. *Educational Leadership*, May 2002.

Elementary Principals As Leaders of Learning Featuring Rebecca Burnette Dufour. *The Video Journal of Education*, 12, (4).

Lencioni, P. (2002). *The Five Dysfunctions of a Team*. San Francisco, CA: Jossey-Bass Publishers.

Lynch, R. and Werner, T. (1992). *Continuous Improvement: Teams and Tools*. QualTeam, Inc.

Maxwell, J. (2002). *The 17 Essential Qualities of a Team Player*. Nashville, TN: Thomas Nelson Publishers.

Richardson, J. (1999, August/September). Norms put the 'Golden Rule' into Practice for Groups. *Tools for Schools*, 1-6.

Senge, P. (2000). *Schools That Learn: A Fifth Discipline Fieldbook for Educators, Parents, and Everyone Who Cares About Education*. New York: Doubleday

# Acknowledgments

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