

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

## **Recruiting & Selecting**



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*
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## Prerequisites

You should complete *Leading a Team to Develop Performance Foundations* (Balanced Performance Improvement Series) before beginning the Leading Better Seeking Teams Series.

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## Related GLIS Modules

Other modules related to this topic include:

- *Conducting Effective Meetings to Improve Student Achievement and Organizational Effectiveness*
  - *Leading a Team to Analyze and Display Data Using Quality Tools*
  - *Leading a Team to Analyze Performance Factors*
  - *Leading a Team to Analyze Root Causes Using Quality Tools*
  - *Leading a Team Develop Norm and Covenants*
  - *Leading a Team to Develop Performance Foundations*
  - *Leading a Team to Develop SMART Goals*
  - *Leading a Team Through Group Decision-making*
  - *Leading Faculty Study Group Series, 1 of 2: Getting Started*
  - *Leading Faculty Study Group Series, 2 of 2: Maintaining Momentum*
  - *Leading Team Discussions*
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# Contents

<b>Related Modules .....</b>	<b>2</b>
<b>Contents .....</b>	<b>3</b>
<b>Progress Tracker .....</b>	<b>4</b>
<b>Performance Objective(s).....</b>	<b>5</b>
<b>Module Introduction .....</b>	<b>6</b>
<b>Topic 1: Defining Personal Characteristics of the BST.....</b>	<b>15</b>
<b>Topic 2: Identifying BST Team Roles and Responsibilities.....</b>	<b>31</b>
<b>Topic 3: Recruiting &amp; Selecting a BST .....</b>	<b>42</b>
<b>Final Practice .....</b>	<b>48</b>
<b>Final Assessment .....</b>	<b>59</b>
<b>Recommended Reading and Resources .....</b>	<b>69</b>
<b>Acknowledgments .....</b>	<b>70</b>



# Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"> <li>• An improvement initiative that requires a team of individuals to address</li> <li>• Instructional and organizational data validating the area of need</li> <li>• Selection criteria for the types of skills and knowledge, characteristics, values, and experience that individuals need to carry out the improvement initiative</li> <li>• A pool of candidates from which to recruit and select team members</li> </ul>	<p>Recruit and select members of the BST who are qualified to assess an area of need and implement team-based improvement targeting that need.</p>	<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>

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# Module Introduction

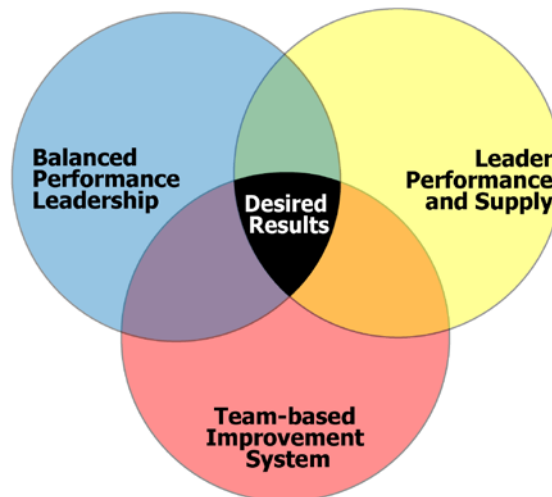
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## Team-based Improvement: Key to Initiating School Improvement

While learning interventions are key to school improvement, there are additional factors that must also occur simultaneously to bring school improvement to reality. It is dependent upon three critical best practices that must work in tandem to accomplish **desired results** within the learning environment.

Those three components are:

- **Team-based Improvement** – to leverage best practices and engage all stakeholders
- **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



The *Leading Better-seeking Teams* module series supports the realization of the first best practice, **Team-based Improvement System**. Research has shown that increased stakeholder involvement is critical to school improvement. The goal is to establish a culture of team-based improvement so that teams work together to solve problems and sustain success.

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**Team-based  
Improvement  
Through a Better-  
seeking Culture**

In *Educational Leadership*, March 2006, Roland Barth stated, “The nature of the relationships among the adults within a school has a greater influence on the character and quality of that school and on student accomplishment than anything else.”

The Better-seeking Team (BST) is a vital element in any leader journey toward school improvement. A BST is any team within a school or district that included “better-seekers” — faculty, staff and leaders who share a commitment to continuous improvement and who combine their talents and abilities to accomplish a specific goal or series of goals.

**Better-seeking Cultures:**

- Take advantage of the power of synergy....the total is greater than the sum of its parts
- Align acts of improvement
- Stay data-focused
- Follow a deliberate process of Plan-Do-Check-Act
- Analyze root causes and avoid “solution jumping”
- Develop good performance measures that lead to SMART Goals
- Foster team growth and learning
- Remove communication barriers
- Accomplish targeted action planning
- Share best practices
- Promote team collaboration
- Enforce team accountability

It is imperative that all leaders, faculty, staff, and critical mass of stakeholders be collaboratively engaged in a team-based approach, lending their expertise and perspective to analyze the potential causes of issues and seek consensus on the solutions. Although individual contributions are critical to any initiative, the success or failure of an initiative will greatly depend on how well all individuals can collaborate and work as a team toward a common goal.

The “better-seeking” process is an action vehicle for the work of any teams focused on collective inquiry to drive student achievement and adult professional growth.

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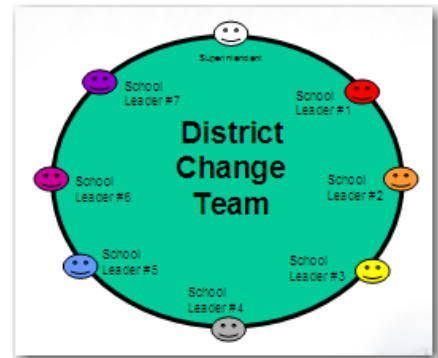
## Three Types of Better-seeking Teams

Depending on your position, you will recruit and select Better-seeking Teams for a variety of purposes and at varying levels within the organization. Some of those purposes include (but are not limited to) getting to the root of systemic issues, managing ongoing tasks, studying problems, and implementing solutions.

There are three types of teams you need to understand to successfully complete this module series:

### 1. Strategic Teams

- Usually appointed by the organization's leaders to work on a systemic issue that is foundational to the success of the organization such as mission, vision, values, and planning.
- Members may volunteer to serve based on project interest, but all members are formally invited.
- **Example:** A District Change Team (DCT) has been created to address the district graduation rate (52%). The DCT is comprised of representatives of schools / departments throughout the district.



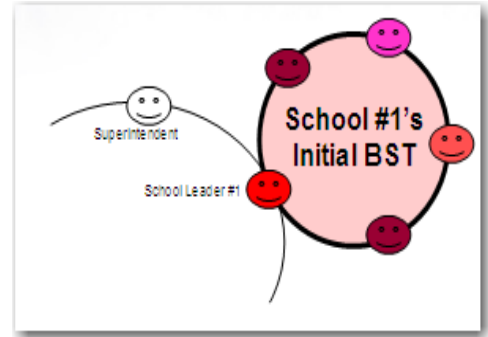
With the graduation rate in mind, each DCT team member returns to the school to form *structural* teams. The structural team will analyze the specific causes that impact graduation rate within their own school community.

### 2. Structural Teams

- Also known as an Initial Better-seeking Team or IBST.
- Exist to manage ongoing tasks related to the organization.
- Members automatically participate because of their role in the organization.
- May be cross-functional or formed as a grade-level team or department team.

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- **Example:** Each District Change Team member forms an IBST in his/her school to analyze the data and causes contributing to the 52% graduation rate.



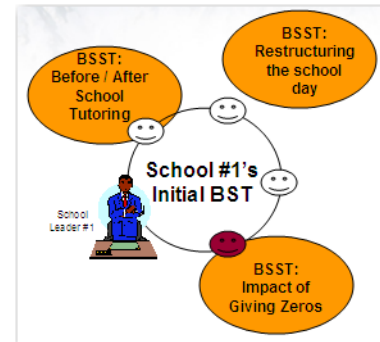
The elementary school IBST discovers 40% of third-graders are failing math.

The IBST decides to cascade three issues further down in their own organizations. Those issues are:

- Restructuring the school day
  - Providing before/after school tutoring
  - Looking at the impact of giving zeros
- These issues are handed off to a “dynamic” team or a Better-seeking Solutions Team.

### 3. Dynamic Teams

- Known as a Better-seeking Solutions Team or a BSST.
- Exists to tackle improvement-oriented projects and tasks.
- Often include individuals closest to the problem or opportunity.



- Teams are formed and dissolved as needed.
- Participation may be appointed or self-initiated.
- **Example:** Three BSSTs are created with each given one of the issues identified by the IBST.
- They dig deeper into that issue, further validate its impact, and put together an action plan for implementation.

**Engage Critical  
Mass of  
Stakeholders**

Depending on the nature of your improvement initiative, you will fill your team with the critical mass of stakeholders needed to reach your required goal. This necessitates a group that embodies a variety of participants. For instance, a grade-level BST would likely consist of all teachers; and a student culture BST would include students, faculty, and staff. However, a community-involvement BST would probably include parents and business leaders as well as teachers and students. Sometimes, the political situation in a school or district dictates what type of participants should be invited to the team.

Consider which of these performers and stakeholders need to make up the membership of your team:

- Teachers
  - Administrators (principals, assistant principals, etc.)
  - Support staff
  - District staff
  - Students
  - Parents
  - Community leaders
-

## **The Leading Better-seeking Team Series of Modules**

This module is the first of four in this Leading Better-seeking Teams series. Regardless of which type of BST you work with, this module guides you through the steps to effectively recruit and select your team. You will want to use Part 1 and Part 2 to get any BST started.

The second module in the series is Part 2: Orienting and Focusing. This module helps you get the team you have recruited and selected off “on the right foot” so they can quickly become more effective.

The final two modules in the series focus on different aspects of working toward a solution regarding an identified area of need. The remaining modules are:

- Part 3: Refining the SMART Goal and Cascading the Work shows you how to lead the IBST through the initial analysis of the improvement initiative identifying potential causes and refining the SMART Goal. You will then cascade the work of planning for implementation to the BSST.
- Part 4: Implementing the Action Plan guides you through the steps of leading your BSST through implementing the actions needed to bring the SMART Goal to reality.

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## **Recruiting and Selecting**

In an effort to meet the goals of the schools – which are to improve overall graduation rates, dropout rates, and impact student progression – it is important for everyone in the school to be involved in a collaborative, team-based improvement effort.

The “better-seeking” process is an action vehicle for the work of any team(s) focused on continuous improvement. In this module, you will learn skills to recruit and select a group of individuals who will form a Better-seeking Team (BST).

You will:

- Define the desired personal characteristics of the BST
  - Identify the team roles and responsibilities of the BST
  - Select and recruit the appropriate individuals who satisfy the criteria for the BST
-

**Why is Recruiting and Selecting Individuals for a Better-seeking Team Important?**

What's in it for the leader?

- It gives you confidence that the team will work effectively and efficiently to achieve its goal
- You learn how to match individuals' talents with the improvement initiative at hand
- You develop teams with characteristics, roles, and values needed to fulfill the intended goal
- You are fostering self-directed ownership by key stakeholders for solving other identified school improvement initiatives.

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

- A passive observer becomes a decision-maker
- All teachers have a clear picture of the outcomes that matter for student achievement and learning
- The appropriate mix of skill and talent is maximized for focusing on the improvement needs with the greatest impact
- A clear direction is communicated and brought to reality

What's in it for students and student achievement?

- Strong leadership teams ensure that all student needs are met
  - The classroom becomes a learning community
  - Students know what is expected of them and the outcomes that are needed to be successful
-

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

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

Tangible Results:

- Student achievement improves
- Stakeholder engagement increases
- Purposeful teams of individuals with the expertise, characteristics, and values needed to carry out the assigned school improvement initiatives
- Standard list of requirements (expertise, characteristics, values, roles) for various types of school improvement initiatives, which can be used to select and recruit for future Better-seeking Teams
- There is a transformation to more shared inquiry and decisions that make a difference (leading indicator)

Intangible Results:

- More accurate decisions are made, based on research, clear criteria, and specific feedback
  - Teacher satisfaction increases
  - There is a greater percentage of successful school improvement initiatives
  - Positive morale among colleagues increases
  - Greater willingness among team members to fill in where others lack certain strengths
  - Greater willingness among team members to ask for help when needed
  - Decisions are made from a more thorough understanding of candidates' or future team members' strengths and areas of need
  - There is a greater understanding of the impact and contributions of effective teams as opposed to teams that are not effective
-

### What is the Leader's Role?

Your role throughout this module is to recruit and select a team that supports the conditions of practice that create team-based improvement. Your goal is to get the right people on the right bus going in the right direction.

To help you achieve the performance results you want, you must have a clear understanding of the improvement initiative and be able to make conscious efforts to shape that culture by accurately assessing who will be the key members of your Better-seeking Team.

In addition, to effectively lead your team through the activities in this module, you should:

- Be prepared with the necessary materials and supplies
  - Schedule and communicate meeting times and locations to participants
  - Thank the participants, acknowledging everyone's worthwhile contribution to the group and commitment to future actions
- 

### 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: Defining Personal Characteristics of the BST

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## **Defining the Desired Personal Characteristics of the BST**

When you select individuals to serve on a Better-seeking Team, look for people with specific personal characteristics and values. Because these individuals will be working on a team toward a common goal, look for people with certain team-related traits regardless of the type of initiative the team will be addressing. In addition, take time to consider individuals with the right mix of characteristics, skills, and values to ensure the resulting team has the combined strengths needed to work on the improvement initiative.

In this topic you will:

- Identify the BST needs based on the perceived improvement initiative
- Consider the personal attributes, work style, and values that each candidate brings to the team, based on the improvement initiative
- Identify potential candidates that make up the critical mass of stakeholders that are key to working on the designated area of need

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## **Engaging a Critical Mass of Stakeholders is Key**

Better-seeking Teams are made up of people with diverse skills and personalities, who use their strengths in full, and compensate for each others weaknesses. The teams are designed to engage faculty and staff and a critical mass of stakeholders to produce a particular improvement result. A “critical mass of stakeholders” means the minimum number of people with shared understanding to tip the balance and initiate change. You need to make some thoughtful and deliberate decisions about who those stakeholders are based on the task at hand.

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**What are the Desired Personal Characteristics of BST Candidates?**

There are several types of characteristics that you need to consider when recruiting and selecting desirable BST candidates.

- Consider the **personal attributes** of potential candidates to ensure that your BST is willing to go the extra mile to carry out the area of need and achieve its goals.
  - Review **work styles** of potential candidates to make sure the BST has the ability to perform certain tasks and complete necessary work within the timeframe given.
  - Identify whether potential candidates have the necessary **values** to ensure the BST can work together effectively as a group toward a common goal.
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**When Do I Begin This Task? (Cues)**

You begin this task once you have identified an area of need that requires focused attention and further analysis.

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

Your mission is to get the right people on the right bus in the right seat at the right time. As you do this, you must keep the area of need clearly in focus as you define the appropriate characteristics. This will enable you to make the best matches of skill and talent against the area of need needing further analysis and capitalize on individual and collective strengths of the team members to the greater good of the school.

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**What Resources are Required?**

“Defining the Personal Characteristics of BST Candidates” Practice Worksheet (Located in the Topic 1 Practice)

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**Tip(s)**

There are several common errors that leaders make when selecting and recruiting members for a Better-seeking Team to address an improvement initiative. These errors are general in nature and may not always apply to all teams; however, your teams will have a much greater opportunity for success if you avoid these errors:

- Preconceived notions you have as to who needs to be on the BST
- Incorrectly identifying the improvement initiative
- Using only existing teams
- Rushing through the selection process
- Selecting the most popular staff member(s)
- Selecting the most vocal staff member(s)
- Selecting negative staff member(s) with the intention of making them positive
- Selecting only those who agree with the leader
- Not completing all aspects of the Practice Worksheets and exercises included in this module

Let the area of need and the talents and experience of the individuals drive the makeup of the BST. Use the Practice Worksheet provided in the Topic Practice to help you address these issues relative to successful recruiting and selecting effective team members.

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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
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**Step-Action Table**

Step	Action
<b>1. Conduct an initial review of the data</b>	<ul style="list-style-type: none"> <li>• Review any data that led you to conclude that this area of need requires attention by a BST.</li> <li>• Reconfirm that this area of need is where the BST should concentrate its time and effort.</li> </ul>
<b>2. Identify team needs</b>	<ul style="list-style-type: none"> <li>• Identify the specific skills and resources that are required by the BST to perform the task at hand.</li> <li>• Answer the following questions.               <ul style="list-style-type: none"> <li>○ What knowledge and expertise do I need to tap for this BST?</li> <li>○ What resources do I need to access for this team-based improvement initiative to be successful?</li> <li>○ What time commitments are involved on the part of the critical mass of stakeholders?</li> <li>○ How will I create a sense of urgency with the stakeholders to accomplish the goal?</li> </ul> </li> </ul>

Step	Action
<p><b>3. Consider candidates' personal attributes</b></p>	<p>For each candidate, ask yourself the following questions. In cases where you can answer “yes” to a question, you should note specific examples and observations in which the candidate has demonstrated the attribute.</p> <p><b>Positive attitude:</b></p> <ul style="list-style-type: none"> <li>• Does the individual have a positive attitude?</li> <li>• How does the individual respond when asked to help out a colleague or take on additional responsibility?</li> <li>• Does the individual agree to help out or does s/he complain about the request?</li> </ul> <p><b>People skills:</b></p> <ul style="list-style-type: none"> <li>• Does the individual enjoy working together with colleagues or does s/he prefer working as an individual contributor?</li> <li>• Does the individual seek out colleague input and involvement or does s/he stay to him or herself?</li> </ul> <p><b>Proven track record:</b></p> <ul style="list-style-type: none"> <li>• Has the individual worked on other similar projects and were they successful?</li> <li>• Did others report that the individual was a significant contributor?</li> <li>• Did the individual realize and document lessons learned on previous initiatives?</li> </ul> <p><b>Confidence:</b></p> <ul style="list-style-type: none"> <li>• Does the individual have confidence to perform the project tasks?</li> <li>• Will the individual say that s/he can perform the assigned tasks effectively?</li> <li>• Does the individual openly share best practices and lessons learned from past experiences?</li> </ul> <p><b>Self-discipline:</b></p> <ul style="list-style-type: none"> <li>• Does the individual complete assignments on time and within the budget?</li> <li>• Does the individual do what s/he says s/he will do?</li> </ul> <p style="text-align: center;"><i>(continued next page)</i></p>

Topic 1: Defining Personal Characteristics of the BST  
Leading Better-seeking Teams: Recruiting & Selecting

Step	Action
	<p><b>Communication skills:</b></p> <ul style="list-style-type: none"> <li>• Does the individual ask for help or delegate assignments when needed?</li> <li>• Does the individual report status on time?</li> <li>• Does the individual ask for clarification when something is unclear or provide clear explanations to others who have questions about something unclear?</li> <li>• Can the individual facilitate meetings, mentor others, or provide other guidance or directions in an articulate manner when necessary?</li> </ul> <p><b>Discontent with the status quo:</b></p> <ul style="list-style-type: none"> <li>• Does the individual take appropriate action when s/he observes something that needs to be improved?</li> <li>• Does the individual ask questions about why things are done in a certain way?</li> <li>• Does the individual discuss and suggest ways to improve current school and teaching practices?</li> </ul>

Step	Action
<p><b>4. Consider candidates' work style</b></p>	<p>For each candidate, ask yourself the following questions. Note specific examples and observations.</p> <p><b>Makes decisions based on facts:</b></p> <ul style="list-style-type: none"> <li>• Does the individual use evidence and data to make decisions?</li> <li>• Does the individual analyze data before drawing conclusions and making decisions?</li> </ul> <p><b>Takes initiative:</b></p> <ul style="list-style-type: none"> <li>• Does the individual volunteer to lead an improvement effort when either s/he or another person identifies an opportunity?</li> <li>• Does the individual complete tasks without being asked or ask for additional responsibility when his/her tasks are complete?</li> </ul> <p><b>Mobilizes teachers around a common purpose:</b></p> <ul style="list-style-type: none"> <li>• Does the individual describe the improvement opportunity to other teachers and what success would look like if they were to work as a team and address the issue?</li> <li>• Does the individual convince teachers that they are needed to solve problems and complete tasks towards achieving a common goal or purpose?</li> </ul> <p><b>Gathers and uses resources:</b></p> <ul style="list-style-type: none"> <li>• Does the individual gather and refer to appropriate resources and other forms of data, such as district and school reports and educational research?</li> </ul> <p><b>Completes the steps in the Plan-Do-Check-Act Cycle:</b></p> <ul style="list-style-type: none"> <li>• Does the individual follow the Plan-Do-Check-Act Cycle on a regular basis when appropriate?</li> </ul> <p><b>Sustains the commitment of others:</b></p> <ul style="list-style-type: none"> <li>• Does the individual collaborate with colleagues to ensure that work is accomplished within the allotted timeframe?</li> <li>• Does the individual regularly check to ensure that the goals of the improvement initiative are achieved?</li> <li>• Does the individual assist and support colleagues, or help them find assistance or support elsewhere when needed?</li> </ul>

Step	Action
<p><b>5. Consider candidates' value</b></p>	<p>For each candidate, ask yourself the following questions. Note specific examples and observations.</p> <p><b>Courageous:</b></p> <ul style="list-style-type: none"> <li>• Does the individual accept responsibility when results are less than positive?</li> <li>• Does the individual give constructive feedback when necessary to ensure that his/her colleague knows what to do to improve?</li> <li>• Has the individual been known to work out of his/her “comfort zone” where s/he lacks certain skills and there are many unknowns?</li> </ul> <p><b>Risk-taker:</b></p> <ul style="list-style-type: none"> <li>• Does the individual take appropriate risks?</li> <li>• Does the individual do things that s/he believes must be done without asking permission?</li> </ul> <p><b>Open-minded:</b></p> <ul style="list-style-type: none"> <li>• Is the individual willing to consider other ways to complete a task or accomplish a goal?</li> </ul> <p><b>Optimistic:</b></p> <ul style="list-style-type: none"> <li>• Is the individual positive about the work to be accomplished and optimistic that the work, once accomplished, will achieve the goals of the initiative?</li> </ul> <p><b>Enthusiastic:</b></p> <ul style="list-style-type: none"> <li>• Does the individual congratulate colleagues when they do something well or produce expected results?</li> <li>• Does the individual talk about improvement initiatives with passion and joy?</li> <li>• Does the individual encourage others to take on tough assignments?</li> </ul> <p><b>Decisive:</b></p> <ul style="list-style-type: none"> <li>• Can the individual make decisions?</li> <li>• Does the individual analyze data before making decisions?</li> </ul> <p><b>Critical reflection:</b></p> <ul style="list-style-type: none"> <li>• Before making a final decision, does the individual weigh all the options?</li> <li>• Does the individual identify the risks and benefits of various solutions?</li> </ul> <p><b>Creative:</b></p> <ul style="list-style-type: none"> <li>• Does the individual try new strategies with colleagues or students?</li> </ul> <p style="text-align: right;"><i>(continued next page)</i></p>

Step	Action
	<p><b>Flexible:</b></p> <ul style="list-style-type: none"> <li>• Is the individual willing to change course or direction on a project at a moment's notice when the situation calls for it?</li> </ul> <p><b>Perseverance:</b></p> <ul style="list-style-type: none"> <li>• Is the individual tenacious, stopping at nothing in order to complete assigned work on time and according to expectations?</li> </ul> <p><b>Committed to student learning:</b></p> <ul style="list-style-type: none"> <li>• Is the individual committed to helping all students learn and be successful regardless of the effort needed to develop skills and knowledge?</li> </ul>
<p><b>6. Identify potential candidates</b></p>	<ul style="list-style-type: none"> <li>• Based on your consideration of these questions, narrow the list of candidates to only those you feel possess the personal characteristics to make a good team member. Consider the following: <ul style="list-style-type: none"> <li>○ Teachers</li> <li>○ Administrators</li> <li>○ Support Staff</li> <li>○ District Staff</li> <li>○ Students</li> <li>○ Parents</li> <li>○ Community Leaders</li> </ul> </li> <li>• Keep this list of candidates available, so that when it is time to assemble a BST, you will have a "short list" of people to consider as your core candidates.</li> </ul>
<p><b>7. Check to avoid common errors</b></p>	<p>Before continuing, ask yourself this set of questions to ensure that you are avoiding common errors made when selecting team members:</p> <ul style="list-style-type: none"> <li>• Using only existing teams: Am I considering this person primarily because s/he already serves as a member of existing team(s)?</li> <li>• Selecting the most popular staff member(s): Am I considering this person primarily because s/he is a popular member of the faculty / staff?</li> <li>• Selecting the most vocal staff member(s): Am I considering this person primarily because s/he is one of the most vocal faculty / staff?</li> <li>• Selecting negative staff member(s) with the intent to make them positive: Am I considering this person primarily because s/he is a negative force in the organization, and I would like to get him or her "on my side?"</li> <li>• Selecting only those who agree with the leader: Am I considering this person primarily because I expect him or her to agree with my ideas and actions as the leader?</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

In this practice you are going to define the personal traits, work styles, and values that should be characteristics of your BST relative to the perceived improvement initiative.

Using the “Desired Characteristics of BST Candidates Practice Worksheet,” you will:

- List the improvement need on which you want the BST to focus
  - Identify the requirements needed for the BST:
    - Knowledge and expertise
    - Skills and resources
    - Time and attention
  - Define the desired characteristics of members of the BST (A “memory jogging” checklist would be provided around three areas):
    - Personal attribute (i.e. positive attitude, people skills)
    - Work style (i.e. takes initiative, makes decisions based on fact)
    - Values (i.e. courage, flexible)
  - List the names of potential candidates (internal stakeholders/external stakeholders) you are considering for the BST.
  - Confirm that in selecting these candidates you are avoiding some common errors.
  - Share your work with your coach.
-



**Practice Worksheet**

Use this page as a “memory jogger” as you consider whether each of your candidates has the desired characteristics of a BST member.

Personal Attributes	Work Style	Values
<input type="checkbox"/> Positive attitude	<input type="checkbox"/> Makes decisions based on facts	<input type="checkbox"/> Courage
<input type="checkbox"/> People skills	<input type="checkbox"/> Takes initiative	<input type="checkbox"/> Risk-taker
<input type="checkbox"/> Proven track record	<input type="checkbox"/> Mobilizes teachers around a common purpose	<input type="checkbox"/> Open-minded
<input type="checkbox"/> Confidence	<input type="checkbox"/> Gathers and uses resources	<input type="checkbox"/> Optimistic
<input type="checkbox"/> Self-discipline	<input type="checkbox"/> Completes the steps in the Plan-Do-Check-Act Cycle	<input type="checkbox"/> Enthusiastic
<input type="checkbox"/> Communication skills	<input type="checkbox"/> Sustains the commitment of others	<input type="checkbox"/> Decisive
<input type="checkbox"/> Discontent with the status quo		<input type="checkbox"/> Critical reflection
		<input type="checkbox"/> Creative
		<input type="checkbox"/> Flexible
		<input type="checkbox"/> Perseverance
		<input type="checkbox"/> Committed to student learning

**Practice Worksheet**

For each of the characteristics that the candidate has demonstrated, list an example below.

Candidate Name	Examples of Personal Attributes	Examples of Work Style	Examples of Values
<p><b>Final Decision:</b>                      Would I select this candidate?</p> <p><input type="checkbox"/> Yes  <input type="checkbox"/> No</p>			
<p><b>Final Decision:</b>                      Would I select this candidate?</p> <p><input type="checkbox"/> Yes  <input type="checkbox"/> No</p>			
<p><b>Final Decision:</b>                      Would I select this candidate?</p> <p><input type="checkbox"/> Yes  <input type="checkbox"/> No</p>			

**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. Conducted an initial review of the data	<input type="checkbox"/> Established a first look at potential improvement initiative <input type="checkbox"/> The area of need is identified <input type="checkbox"/> Data is presented that shows this area of need requires attention by a BST	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Identified the specific skills and resources that are required by the BST to perform the task	The following team requirements are identified relative to the perceived improvement initiative <input type="checkbox"/> Skills/expertise <input type="checkbox"/> Resources <input type="checkbox"/> Knowledge <input type="checkbox"/> Time commitment	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Considered candidates’ personal attributes	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a “yes” answer <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 1: Defining Personal Characteristics of the BST  
Leading Better-seeking Teams: Recruiting & Selecting

Evidence	Criteria	Proficient? Give Feedback.
4. Considered candidates' work styles	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Considered candidates' values	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Identified initial list of BST Candidates	<input type="checkbox"/> Established initial list of individuals who qualify as potential BST candidates	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Common selection errors are avoided	<input type="checkbox"/> Leader has asked him/herself questions to check that selection errors have been avoided	<input type="checkbox"/> Yes <input type="checkbox"/> No

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## Topic 2: Identifying BST Team Roles and Responsibilities

### Identifying Team Roles and Responsibilities

You've identified the general characteristics, skills, and values needed of any individual who will collaborate with others and work on a team. Now it's time to start narrowing down the list by looking at what individuals will need to do in the way of leadership and task specific roles.

In this topic you will:

- Revisit the improvement initiative as it relates to the BST
- Reflect on your own value you bring to the team by completing the 8 Roles of School Leaders™ Assessment
- Further clarify the values the BST members bring to the table and verify that you have all the necessary roles covered for this BST and the appropriate members identified

### Maximizing the 8 Roles of School Leaders™ identified by GLISI within Better-seeking Teams

Different types of teams usually need different skill sets, depending on the nature of their improvement initiatives. However, there are some general roles that are common to all types of teams. GLISI has developed the 8 Roles of School Leaders™ Assessment. The 8 Roles for School Leaders™ (listed on next page) define the competencies and tasks that effective leaders must know and be able to do to perform their job roles at maximum proficiency. The BST should be comprised of leaders in each of the eight roles in order to perform more effectively. Each Better-seeking Team will need to include one or more of the roles described below based on the improvement initiative being analyzed.

<b>The 8 Roles of School Leaders™</b>	
1. Curriculum, Instruction, and Assessment Leader	Implements systems approach to instruction in a standards-based environment by leading collaborative efforts to prioritize curriculum, develop aligned assessments, and plan instruction to improve student achievement.
2. Data Analysis Leader	Leads teams to analyze multiple sources of data to identify improvement needs, symptoms, and root causes.
3. Process Improvement Leader	Identifies and maps core processes and results to create action plans designed to improve student achievement.
4. Learning and Professional Development Leader	Applies proven, systematic processes for improvement through analyzing human performance; planning for improvements; designing, developing, and supporting implementation of solutions to close performance gaps. This leader helps individuals make full use of their strengths toward personal and organizational goals and works to create a collaborative teaching and learning organization which develops leaders at all levels.
5. Relationship Leader	Identifies and develops relationships among customer and stakeholder groups and communicates goals and priorities focused on student learning.
6. Performance Leader	Strategically plans, organizes, measures, monitors, and manages systems and processes necessary to improve student achievement.
7. Operations Leader	Effectively and efficiently organizes resources, processes, and systems to support teaching and learning.
8. Change Leader	Drives and sustains change in a collegial environment focused on continued improvement in student achievement.

**Defining Your Value as Part of the BST**

Before you verify that all members of the BST have a defined leadership role within the BST, it is critical that you, as the Leader, are clear on the value you bring to the team and where your areas of opportunity are.

Part of this process includes first assessing where your value is among the 8 Roles of School Leaders™ and the rounding out the team with the other roles that are necessary for accomplishing the desired outcome.

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**Defining Each Team Member's Value as Part of the BST**

A key step in selecting who will be on the BST is assessing the unique value each person brings to the BST. Just as you will do, you will have potential candidates reflect on their role and value they would be able to offer by completing the 8 Roles of School Leaders™ Assessment. Using this assessment as one part of your individual discussion with the candidates, you will be able to form a better idea of whether each candidate is a good fit for the work of the BST you are forming.

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

You begin this task once you have defined the desired personal characteristics of the BST, conducted an initial review of personal attributes and work styles that need to be evident in the team, and completed a preliminary analysis of who should be part of the BST.

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

Your role is to make an honest and accurate assessment of your value to the BST.

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**What Resources are Required?**

The 8 Roles of the School Leaders™ Assessment - School Level

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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 value you bring to the BST</b></p>	<ul style="list-style-type: none"> <li>• Determine the value you, as the leader, bring the BST by:           <ul style="list-style-type: none"> <li>– Completing the 8 Roles of School Leaders™ Assessment (found on the GLISI website)               <ul style="list-style-type: none"> <li>○ Go to <a href="http://www.galeaders.org">www.galeaders.org</a></li> <li>○ Scroll to the bottom of the home page to a section titled <i>Downloads and Resources</i></li> <li>○ Link to the 8 Roles of School Leaders™ Assessment – School Level</li> <li>○ Assess your mastery of each of the 8 Roles of School Leaders™ by reading through the descriptions listed and pinpointing your mastery level on the designated scale of 1-4</li> <li>○ Complete pages 1-10 only</li> </ul> </li> <li>– Reflect on your value to the BST 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> </ul> </li> </ul>
<p><b>2. Compare your initial list of potential BST candidates against the 8 Roles of School Leaders™</b></p>	<ul style="list-style-type: none"> <li>• Review your initial list of potential candidates identified in Topic #1.</li> <li>• Think about each member of the BST and answer the following questions.           <ul style="list-style-type: none"> <li>– Based on my knowledge of the stakeholders (including my value), do I have all of the 8 Roles of School Leaders™ covered?</li> <li>– If I do not have all of the 8 Roles of School Leaders™ covered, what other stakeholders do I need to include?</li> </ul> </li> </ul> <p><b>Tip:</b> Based on your improvement initiative, think about all types of team members that exist within your school community. Make sure the right stakeholders are represented from areas such as teachers, administrators, support staff, district staff, students, parents, and community leaders.</p>

Step	Action
<p><b>3. Direct the potential team members to determine their own value to the perceived improvement initiative</b></p>	<ul style="list-style-type: none"> <li>• Communicate with each potential BST candidate your interest in their being part of this BST and assessing their value they would bring to the team. In that communication, give them the following information:           <ul style="list-style-type: none"> <li>– A brief introduction to the purpose of this BST</li> <li>– Importance of completing the 8 Roles of School Leaders™ Assessment as a potential BST member</li> <li>– Instructions on where to locate a copy of the 8 Roles of School Leaders™ Assessment and how to complete it (see instructions for accessing the form and completing it in Step #2 above.)</li> <li>– Let them know to bring their completed 8 Roles of School Leaders™ Assessment with them to the meeting you will have with each one of them individually</li> </ul> </li> <li>• Instruct each potential BST candidate to determine the value s/he will bring to the BST by answering the following questions prior to the meeting            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> </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**

In this practice, you will identify the team roles and responsibilities necessary for the BST members. You will:

- Complete the 8 Roles of School Leaders  Assessment (found on the GLISI Web site)
- Reflect on your value to the BST by answering the following questions located on the “Identifying Team Roles and Responsibilities Practice Worksheet”.

Of all the roles I checked:

- Which role would I most like to lead on our BST?
  - What is my perceived strength?
  - What is my area of opportunity?
  - How will I apply my role strength on the BST to accomplish the goals of the identified improvement need?
- Review your initial list of potential team members identified in Topic 1.
  - Notify the potential candidates that you want to meet with them individually to discuss BST participation and completion of the 8 Roles of School Leaders  Assessment.
  - Think about each team member you have chosen and answer the following questions located on the “Identifying Team Roles and Responsibilities Practice Worksheet.”
    - Based on my knowledge of the stakeholders (including my value), do I have all 8 Roles of School Leaders  covered?
    - Which BST member would take on which roles?
    - If I do not have all 8 Roles of School Leaders  covered, what other stakeholders do I need to include?
-





**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 the value s/he brings to the BST relative to the perceived improvement initiative	<input type="checkbox"/> Determine the value they, as the leader, bring the BST through completing the 8 Roles of School Leaders™ Assessment  <input type="checkbox"/> Indicated: – Which role they preferred on the BST? – Their perceived strength – Their area of opportunity – How they will apply their role strength on the BST to accomplish the goals of the identified improvement need	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Directed the potential team members to determine their own value to the perceived improvement initiative	Sent out initial communication to BST candidates which includes: <input type="checkbox"/> Purpose of BST <input type="checkbox"/> Purpose of the 8 Roles of School Leaders™ Assessment <input type="checkbox"/> Instructions for accessing and completing the 8 Roles of School Leaders™ Assessment as it relates to the BST	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Identifying BST Team Roles and Responsibilities  
Leading Better-seeking Teams: Recruiting & Selecting

Evidence	Criteria	Proficient? Give Feedback.
3. Verified that all of the 8 Roles of School Leaders™ are covered for the BST	<input type="checkbox"/> Compared initial list of potential BST members against the 8 Roles of School Leaders™  <input type="checkbox"/> Based on 8 Roles, appropriate BST members are included	<input type="checkbox"/> Yes <input type="checkbox"/> No

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## Topic 3: Recruiting & Selecting a BST

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### **Recruiting BST Candidates**

In Topic 1 you considered the personal characteristics of the BST and in Topic 2 you described the team roles and responsibilities. Now you are ready to learn how to recruit and select individuals for the work that the BST will accomplish.

Recruiting individuals involves contacting each team member to speak with them about their possible participation and commitment to work as a Better-seeking Team member towards a common goal. Selecting individuals involves a deliberate thought process that takes what you have learned about each individual's skills relative to the BST assignment, and allows you to make a determination as to whether they are right for the team. Then you can officially seat them on the BST. The method you use to contact individuals, explain the improvement opportunity and conduct your selection process is important to learn.

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### **Why is Recruiting BST Candidates Important?**

Now that you've taken the time to review the characteristics of individuals to work on the school improvement initiative, you want to make every effort to ensure that selected individuals see the benefit of working on the initiative, and that they agree to participate as a BST member. You need to plan your conversation so that each individual understands the type of work in which s/he will be involved, if chosen for the BST. BST candidates also need to see how working on the project will be as rewarding and challenging as you say it will be and have a clear understanding of their role and responsibilities as a team member.

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**Plan for the  
Recruiting  
Conversation**

It is a good idea to premeditate the conversation you intend to have with your candidates. Take time to plan the conversation, which should include:

- An estimation of the amount of time the team member will be expected to give and an expression of appreciation for the candidate's time
- A general description of the improvement opportunity that needs further analysis
- The concept of the Better-seeking Team
- The type of work / tasks that the individual will be doing (such as analyzing data to look for probable causes)
- An initial assessment of the strengths, unique value, and impact you believe the individual will have on the initiative
- Your next steps regarding seating the BST and how you will communicate what the final makeup of the team will be

In addition to planning the points to cover with each individual, you should also anticipate what questions or concerns the individual may have about working on the initiative. You won't be able to anticipate every question or concern, but taking the time up front to think through these issues will help you articulate your responses and ensure that the meeting goes smoothly and according to plan.

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

You will begin this task once you have defined the desired characteristics of the BST, and identified their roles and responsibilities, and conducted an initial assessment of who the BST members should be.

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

Your role is to make sure each BST member is clear as to what the focus of the BST is, why they are being considered for a role on the team, and the value you see them bringing to the process. You also need to use this opportunity to make any final assessments regarding the fit of each potential candidate and decide who will be part of the Better-seeking Team.

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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
  - Note: There is no practice activity for this topic.
-

**Step-Action Table**

Step	Action
<p><b>1. Plan the points to cover with the candidates</b></p>	<ul style="list-style-type: none"> <li>• Plan how you will cover the following points, which can be the same for each candidate:                             <ul style="list-style-type: none"> <li>– A description of the improvement issue or opportunity and desired outcomes in simple, concise terms</li> <li>– The concept of the Better-seeking Team</li> </ul> </li> <li>• Plan how you will cover these points, which should be customized for each candidate:                             <ul style="list-style-type: none"> <li>– The type of work/tasks that the individual will participate in during the BST process</li> </ul> <p><b>Tip:</b> Give a couple examples of what the work / tasks might be, such as:</p> <ul style="list-style-type: none"> <li>○ Working with the other team members to review data and look for potential root causes of the improvement issue; or,</li> <li>○ Establishing baselines and performance metrics for measuring improvement around the improvement initiative</li> </ul> </li> <li>• The strengths, unique value, and impact the individual will have on the initiative based on the results they will share with you from the 8 Roles of School Leaders™ Assessment that they took prior to this meeting</li> <li>• Decide on the method you will use to communicate to the candidates whether they will be part of the BST and the information you want to give them regarding preparing for the BST meetings.                             <ul style="list-style-type: none"> <li>– If a candidate is chosen to be on the BST, include the timeframe they will be given to make their decision regarding being part of this BST (i.e. announcements about BST meetings, pre-work that may be required, etc.).</li> </ul> </li> </ul>
<p><b>2. Anticipate questions</b></p>	<p>Think through and note questions or concerns that each individual may have about working on the initiative</p>
<p><b>3. Schedule meetings with candidates</b></p>	<ul style="list-style-type: none"> <li>• Contact each BST member candidate to schedule a meeting and request his or her participation in the initiative.</li> <li>• Be sure to communicate the date, time, and location for the meeting.</li> </ul>

Step	Action
<b>4. Open the meeting</b>	<ul style="list-style-type: none"> <li>• Express appreciation for candidate’s time.</li> <li>• Describe the improve issue or opportunity and desired outcome in simple, concise terms.</li> <li>• Give brief overview of Team-based Improvement and a Better-seeking Culture</li> <li>• Discuss:               <ul style="list-style-type: none"> <li>– Type of team being assembled</li> <li>– Value individual brings to initiative</li> <li>– Timeframe for BST</li> </ul> </li> </ul>
<b>5. Go over the 8 Roles of School Leaders™ Assessment Results</b>	<ul style="list-style-type: none"> <li>• Encourage the candidate to share the individual results from the 8 Roles of School Leaders™ Assessment that they took prior to this meeting. Address the following questions with them.               <ul style="list-style-type: none"> <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> <li>– Which role would I most like to lead on our BST?</li> </ul> </li> </ul>
<b>6. Close the meeting</b>	<ul style="list-style-type: none"> <li>• Review the process you will use for notifying who will be part of this BST. Make the candidate aware of any next steps you anticipate and what you need to know from them at that point.</li> </ul> <p><b>Tip:</b> Let the candidate know whether you will let him or her know by email or a direct meeting, and once that communication takes place, the timeframe for individual to accept or decline. Tell them that you will also include information such as announcements about dates, times, and location of BST meetings, pre-work that may be required, etc</p> <ul style="list-style-type: none"> <li>• Clarify any questions and concerns the candidate may have.</li> <li>• Thank the candidate once again for his or her time and consideration.</li> </ul>
<b>7. Review your notes and make final selection of BST members</b>	<ul style="list-style-type: none"> <li>• Review your notes from each of your meetings with the potential BST candidates</li> <li>• Decide who will be part of the team.</li> </ul>

Step	Action
<b>8. Notify all candidates of final decision</b>	<ul style="list-style-type: none"><li>• Determine what communication method you will use to notify all the candidates to let them know your final decision regarding the BST members.</li><li>• Let the new BST know the next steps and where the initial meeting will take place.</li><li>• Notify any candidates who will not serve on this BST and let them know why you made your decision.</li></ul>

# 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

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## Practice Scenario

Recruit a colleague you know well. Instruct this colleague to role-play the part of one of your Better-seeking Team members you have initially determined may be a good fit for this BST. You will conduct a preliminary meeting with your colleague to determine whether they will be recruited and selected to be a member of the BST.

You will:

- Plan the conversation you will have with this potential candidate using the “Recruiting and Selecting BST Candidates Practice Worksheet,” and
  - Facilitate a “practice” conversation with your colleague, who will take on the candidate’s role.
-

**Final Practice Worksheet**

List the name of the candidate with whom you would like to meet to be a potential member of this BST.

Determine the date, time, and location of the meetings with the BST candidate.

Plan the points you need to cover, that will be the same for each invited candidate.

Description of the perceived improvement issue or opportunity:

Explanation of the Better-seeking Team:

Description of tasks:

Next steps following meeting:

**Final Practice Worksheet**

Plan those points of the conversation that are specific to each candidate.

Candidate Name	Skills / Experience	Unique Value to Team	Anticipated Questions

### Final Practice Worksheet

Contact the individual and conduct the meeting. When you are finished, get feedback about your performance from the person who played “candidate.” Make notes about the outcome, including anything that went particularly well and anything you would do differently next time.

**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. Conducted an initial review of the data	<input type="checkbox"/> Established a first look at potential improvement initiative  <input type="checkbox"/> The area of need is identified  <input type="checkbox"/> Data is presented that shows this area of need requires attention by a BST	<input type="checkbox"/> Yes  <input type="checkbox"/> No
2. Identified the specific skills and resources that are required by the BST to perform the task at hand	The following team requirements are identified relative to the perceived improvement initiative:  <input type="checkbox"/> Skills/expertise <input type="checkbox"/> Resources <input type="checkbox"/> Knowledge <input type="checkbox"/> Time commitment	<input type="checkbox"/> Yes  <input type="checkbox"/> No
3. Considered candidates’ personal attributes	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a “yes” answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes  <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
4. Considered candidates' work styles	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Considered candidates' values	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Identified initial list of BST Candidates	<input type="checkbox"/> Established initial list of individuals who qualify as potential BST candidates	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Common selection errors are avoided	<input type="checkbox"/> Leader has asked him/herself questions to check that selection errors have been avoided	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
8. Determined the value s/he brings to the BST relative to the perceived improvement initiative	<input type="checkbox"/> Determine the value they, as the leader, bring the BST through completing the 8 Roles of School Leaders™ Assessment  <input type="checkbox"/> Indicated: <ul style="list-style-type: none"> <li>– Which role they preferred on the BST</li> <li>– Their perceived strength</li> <li>– Their area of opportunity</li> <li>– How they will apply their role strength on the BST to accomplish the goals of the identified improvement need</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Directed the potential team members to determine their own value to the perceived improvement initiative	Sent out initial communication to BST candidates which includes: <ul style="list-style-type: none"> <li><input type="checkbox"/> Purpose of BST</li> <li><input type="checkbox"/> Purpose of the 8 Roles of School Leaders™ Assessment</li> <li><input type="checkbox"/> Instructions for accessing and completing the 8 Roles of School Leaders™ Assessment as it relates to the BST</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Scheduled meetings with candidates	<input type="checkbox"/> Date, time, and location of meetings are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. Planned points to cover	<p>The following points are planned:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The improvement issue or opportunities are described</li> <li><input type="checkbox"/> Role of working on a Better-seeking Team is explained</li> <li><input type="checkbox"/> Date to make decision about BST team members is communicated</li> <li><input type="checkbox"/> Addressing individual's strengths and unique value as part of the BST</li> <li><input type="checkbox"/> Potential questions and concerns are anticipated</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
12. Conducted meetings with each candidate	<ul style="list-style-type: none"> <li><input type="checkbox"/> Individual is thanked for his/her time</li> <li><input type="checkbox"/> All points are covered</li> <li><input type="checkbox"/> Individual's results from the 8 Roles of School Leaders™ Assessment are discussed</li> <li><input type="checkbox"/> Individuals' questions are answered and concerns are addressed</li> <li><input type="checkbox"/> Final decision is obtained, or a due date is scheduled</li> <li><input type="checkbox"/> Leader has reflected on the process and outcome of the meeting, and made notes for continuous improvement</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
13. Verified that the 8 Roles of School Leaders™ are appropriately covered for the BST	<ul style="list-style-type: none"> <li><input type="checkbox"/> Compared initial list of potential BST members against the 8 Roles of School Leaders™</li> <li><input type="checkbox"/> Based on the 8 Roles of School Leaders™, the appropriate BST members are included</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>

Evidence	Criteria	Proficient? Give Feedback.
14. Final selection decision is indicated	<input type="checkbox"/> Leader has indicated whether or not the individual(s) qualify as candidates  <input type="checkbox"/> Leader has notified all candidates with which they met and communicated final decision about who will be on the BST	<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
<b>Eligible for Portfolio</b>			

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**

You will recruit and select members of a BST who are qualified to improve instructional and organizational effectiveness.

For the BST you are forming, you will use the steps and Topic Practice worksheets outlined in topics 1-3 to:

- Define the desired personal characteristics of the BST
  - Identify the roles and responsibilities of the BST using the 8 Roles of School Leaders  Assessment
  - Recruit and select the appropriate individuals who satisfy the criteria for the BST
-

**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. Conducted an initial review of the data	<input type="checkbox"/> Established a first look at potential improvement initiative  <input type="checkbox"/> The area of need is identified  <input type="checkbox"/> Data is presented that shows this area of need requires attention by a BST	<input type="checkbox"/> Yes  <input type="checkbox"/> No
2. Identified the specific skills and resources that are required by the BST to perform the task at hand	The following team requirements are identified relative to the perceived improvement initiative:  <input type="checkbox"/> Skills/expertise <input type="checkbox"/> Resources <input type="checkbox"/> Knowledge <input type="checkbox"/> Time commitment	<input type="checkbox"/> Yes  <input type="checkbox"/> No
3. Considered candidates’ personal attributes	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a “yes” answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes  <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
4. Considered candidates' work styles	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Considered candidates' values	<input type="checkbox"/> Items on the Practice Worksheet are checked, indicating a "yes" answer  <input type="checkbox"/> One or more written examples are provided for each checked item	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Identified initial list of BST Candidates	<input type="checkbox"/> Established initial list of individuals who qualify as potential BST candidates	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Common selection errors are avoided	<input type="checkbox"/> Leader has asked him/herself questions to check that selection errors have been avoided	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
8. Determined the value s/he brings to the BST relative to the perceived improvement initiative	<input type="checkbox"/> Determine the value they, as the leader, bring the BST through completing the 8 Roles of School Leaders™ Assessment  <input type="checkbox"/> Indicated: <ul style="list-style-type: none"> <li>– Which role they preferred on the BST</li> <li>– Their perceived strength</li> <li>– Their area of opportunity</li> <li>– How they will apply their role strength on the BST to accomplish the goals of the identified improvement need</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Directed the potential team members to determine their own value to the perceived improvement initiative	Sent out initial communication to BST candidates which includes: <ul style="list-style-type: none"> <li><input type="checkbox"/> Purpose of BST</li> <li><input type="checkbox"/> Purpose of the 8 Roles of School Leaders™ Assessment</li> <li><input type="checkbox"/> Instructions for accessing and completing the 8 Roles of School Leaders™ Assessment as it relates to the BST</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Scheduled meetings with candidates	<input type="checkbox"/> Date, time, and location of meetings are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. Planned points to cover	<p>The following points are planned:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The improvement issue or opportunities are described</li> <li><input type="checkbox"/> Role of working on a Better-seeking Team is explained</li> <li><input type="checkbox"/> Date to make decision about BST team members is communicated</li> <li><input type="checkbox"/> Addressing individual's strengths and unique value as part of the BST</li> <li><input type="checkbox"/> Potential questions and concerns are anticipated</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
12. Conducted meetings with each candidate	<ul style="list-style-type: none"> <li><input type="checkbox"/> Individual is thanked for his/her time</li> <li><input type="checkbox"/> All points are covered</li> <li><input type="checkbox"/> Individual's results from the 8 Roles of School Leaders™ Assessment are discussed</li> <li><input type="checkbox"/> Individuals' questions are answered and concerns are addressed</li> <li><input type="checkbox"/> Final decision is obtained, or a due date is scheduled</li> <li><input type="checkbox"/> Leader has reflected on the process and outcome of the meeting, and made notes for continuous improvement</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
13. Verified that the 8 Roles of School Leaders™ are appropriately covered for the BST	<ul style="list-style-type: none"> <li><input type="checkbox"/> Compared initial list of potential BST members against the 8 Roles of School Leaders™</li> <li><input type="checkbox"/> Based on the 8 Roles of School Leaders™, the appropriate BST members are included</li> </ul>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>

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

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

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

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

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1	2	3	4
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<b>Eligible for Portfolio</b>			

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
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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
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9.	Other:	1	2	3	4	n/a

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

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

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

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

# Recommended Reading and Resources

Conzemius, Anne and O'Neill, Jan, (2002) *The Handbook for SMART Teams* Indiana: National Education Service.

Eaker, Robert & Dufour, Richard (1998) *Professional Learning Communities at Work*.

Eaker, Robert, Dufour, Richard & DuFour, Rebecca (2002) *Getting Started Reculturing Schools to Become Professional Learning Communities* Indiana: National Education Service.

Hord, Shirley H. (2004) *Learning Together – Leading Together* New York: Teachers College Press

Roberts, Sylvia M., Pruitt, Eunice Z. (2003) *Schools As Professional Learning Communities*.

Schmoker, Mike. (2006) *Results Now: How Can We Achieve Unprecedented Improvements in Teaching and Learning?*.

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

# Acknowledgments

Anne M. Power, Author	Performance & Learning Consultant, Power Performance Solutions, Inc.
Deb Page	Senior Practice Leader, Georgia Leadership Institute for School Improvement
JoAnn Brown	Program Director, Rising Stars, Georgia Leadership Institute for School Improvement
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Jinnie Lee Schmid	Instructional Design/Quality and Continuity Manager, Georgia Leadership Institute for School Improvement
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