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ABSTRACT

Even the best schools must undertake a systematic and continuous appraisal of their current condition and future directions if they are to remain valuable and viable contributors to their community's quality of life. It is clear that schools cannot undertake that appraisal unless it is done in full partnership with the communities in which they are located. This manual was written to help schools and communities undertake such a joint planning process, with the future of both the school and community in mind. One way to get started on a joint planning process is to engage citizens in thinking about a preferred future for both the school and community, then engage the community in a process of identifying critical issues, relevant assets, and key strategies that will move the community toward that preferred future. This manual describes a step-by-step approach to such a process. Chapter 1 addresses building the leadership team, including the importance of community engagement and strategies for increasing it. Chapter 2 describes developing the school-community vision. Chapter 3 discusses identifying issues. Chapter 4 is about mapping community and school assets. Chapter 5 describes developing an action plan, including setting goals, developing strategies, defining activities, and steps for implementation. Chapter 6 discusses monitoring results. Each step is explained in depth, with suggestions on how to proceed and activities that support each step. (TD)

NEW IOWA SCHOOLS

Leadership for Better Schools

NEW IOWA SCHOOLS

DEVELOPMENT CORPORATION

Prepared by the Heartland Center for Leadership Development

"Our advice (to school leaders) would be to start with the community or public, that is, to concentrate first on the community and its concerns rather than on the schools and their goals. We believe that schools are best understood as means to the broader educational objectives of a community and that well-intentioned reforms often reverse this natural order, treating the community as a means to ends dictated by schools. In effect, we propose retracing the steps that brought the public schools into being in the first place."

– David Mathews
Is There A Public For Public Schools?

Prepared for the
New Iowa Schools Development Corporation

by the
Heartland Center for Leadership Development

Vicki Luther and Milan Wall
Co-Directors

About New Iowa Schools...

The New Iowa Schools Development Corporation (NISDC) is a collaborative resource designed to assist the schools of Iowa in maintaining the best teaching environment possible. NISDC applies an integrated system of technical and financial assistance as well as activities designed to implement innovative school improvements and modern techniques in decision making. The NISDC is funded by the Iowa state legislature and private organizations. It is committed to utilizing the power of diversity in its leadership, and includes:

- Area Education Agencies
- Colleges and Universities
- Iowa House of Representatives Education Committee Chairperson
- Iowa Senate Education Committee Chairperson
- Iowa Association of Business and Industry (ABI)
- Iowa Association of School Boards (IASB)
- Iowa Business Council (IBC)
- Iowa Department of Education
- Iowa Parent Teacher Association (PTA)
- Iowa State Education Association (ISEA)
- Office of the Governor
- School Administrators of Iowa (SAI)
- State Board of Education

Preface

Given today's fast-changing world, it is becoming increasingly clear that even the best schools must undertake a systematic and continuous appraisal of their current condition and future directions if they are to remain valuable and viable contributors to their community's quality life. And it's just as clear that schools cannot undertake that appraisal unless it is done in full partnership with the communities in which they are located.

This manual was written to help schools and communities undertake such a joint planning process, with the future of *both* the school and community in mind. Too often, schools and communities either do little planning at all or, if they do, the planning activities are seen as separate and distinct processes. Today, there is a growing recognition that the fate of the communities and their schools are linked so tightly that the future of the community is not secure unless the school thrives, and vice versa.

One way to get started on a joint planning process is to engage citizens in thinking about a preferred future for both the school and community, then engage the community in a process of identifying critical issues, relevant assets and then key strategies that will move the community toward that preferred future. This manual describes a step-by-step approach to such a process. Schools and communities may follow this process rigorously, or they may adapt it in a way that meshes with current local situations and needs.

A Recommended Process and Schedule

What follows is a recommended process and schedule which may be adapted to fit local circumstances. The schedule might be collapsed into a few weeks, instead of several months, if school and community leaders feel a strong sense of urgency. Or sections may be reordered or altered to take into account already existing or ongoing planning processes that these steps may complement or support.

Step 1:	Build the School-Community Leadership Team	August
Step 2:	Vision the School-Community We Prefer	October
Step 3:	Identify Key Issues	December
Step 4:	Map School-Community Assets	January
Step 5:	Develop the Action Plan	March
Step 6:	Monitor Results	April

The chapters of this manual are written to explain each step in depth, with suggestions for how to proceed and activities that support each step. This manual was not intended as a "how-to" guide to school reform, about which massive amounts of material have been developed in the last decade. Rather the purpose of these materials is to outline a process that can be used to engage the public in a process of deliberation about matters important to the school and community. Such matters may include such school improvement issues as strengthening teaching and learning, school and community-relevant matters such as recreation programs, or such other issues as future community support for school programs or facilities.

These materials were developed with support of the New Iowa Schools Development Corporation. Some of the content was supplemented by previous materials developed for the Nebraska Center for Excellence in Education.

Contents

Chapter 1: Building the Leadership Team

The Importance of Community Engagement

Community involvement in education is not a new idea. At one time in our nation's past, community members built schools with their own hands and housed teachers in their own homes. As schooling became more complex, less direct community involvement became the rule. Today, the technical nature of education often keeps the community at a distance, and even parents are often reluctant to visit schools. Community members are often either ignorant of what schools are like, or complacent about school quality. According to national polls, public opinion today assumes that something may be wrong with schools elsewhere, but local schools are probably okay.

The vague good feelings about local schools that are suggested by the national polls are not good enough, however, in a world that is quickly changing in fundamental, structural ways. Because of the increasing complexity of society and economy, it's unlikely that school reform can succeed without broad-based community support. And because so few adults in our communities have children of school age, it's unlikely that community involvement will come easily for either schools or communities. With the increased number of two-income and single-parent families, getting people involved in important local issues of any kind is often difficult.

Yet citizens do participate when they know how and when they perceive a real benefit from their involvement. Trust and comfort are integral to expanded community involvement, and they must be earned over time. It's a process of relationship-building that can be facilitated through a systematic approach to identifying new leaders, support for school and community networks, and eventually building a shared vision of the future of the school and its importance to the community.

Strategies for Increasing Community Engagement in School Reform

Here are a series of strategies that schools can use to increase community involvement in local reform processes:

1. **Understanding the Impacts of Change:** Find ways to dramatize how change is impacting on schools at the local level. Ask yourself these questions:

   Are the school and community ready to embrace or accept that global social and economic changes have a significant impact on life in even the smallest communities? Or do they pretend that life will return to some former, simpler state if we just wait until the good old days return?

   Get information to community leaders that describes the impact of, for example, global economic competition on local graduates. Share information from the recent research about school effectiveness. Ask community and business leaders what they think today's graduates must know to be successful in the future.

2. **Assess Local Attitudes about Schools.** Through informal conversations, focus groups at parent meetings, or formal means such as surveys, find out what you can about local attitudes toward fundamental school change in your community.

   What attitudes of the people (inside schools and out) do you need to help make necessary changes? Are they—are you—open to new ideas and new perspectives? What resistance can you expect? What parts of the community will be most resistant?

3. **Determine What Knowledge is Missing:** Decide what information your community needs that it doesn't now have. Based on your assessment of local understanding and attitudes toward fundamental school change, decide what additional information you need to put into the community's hands... and how you will need to get it there.

   Do you have the information you need? Or do you need to find additional information? Will some other resource be helpful to you? How will you track down that resource?

   Get both school and community leaders involved in a process of determining what information you need that you don't now have, or that you don't think the school and community have grasped sufficiently. Use electronic data bases, government data banks and other up-to-date sources of information in your search for the "missing pieces."

4. **Make Sure the Necessary Players are Involved:** Decide whether you have the right people involved, or whether you need to convince some other important part of the community that your change-oriented process is worthwhile.

   When you get your local leadership group involved or host a community session, ask yourself, "Who's not here?" Among those people who have the most to gain (or lose), who is not represented? Are the right people representing the key constituencies?

   Follow the advice of looking for skills, not names, when you decide who else needs to be recruited to represent the community and the school in the process.

5. **Get People Meaningfully Involved:** The principal stakeholders in local school reform need to be involved for two critical reasons. First, a mix of ideas will lead to better decision making, as the perspective and knowledge of the entire school and community get into the mix. Second, key constituencies need to feel ownership for results. They won't unless they are meaningfully involved from the start:

   Do you have a leadership team that represents key stakeholders? Or, alternatively, do you have advisory committees for each major constituent group? How can you tell whether stakeholders feel that they are meaningfully involved?

6. **Monitor the Process Continuously:** Monitoring progress isn't done just once or only periodically.

   Make sure that you have set up some way to keep track of progress, forecast weak points, and maintain involvement that participants feel is worthwhile.

   Are people attending meetings and work sessions? Do all sessions have time built in for active participation? Are feedback mechanisms built in and obvious?

   Most of us need the understanding and support of others when we try to do something new or different. Make sure that you have others involved who can bring along their own new ideas and fresh approaches... who aren't afraid to tell you that you need to alter your own perspective.

Recruiting the School-Community Leadership Team

A good way to make sure that your community engagement activities stay on track is to recruit a representative group of school and community leaders to serve as a steering committee–*school-community leadership team*–is referred to in these materials. Here's one way to go about recruiting this group:

Identify Stakeholder Groups. Identify a list of key stakeholder groups among critical school constituencies. External constituencies might include business and industry, health care, farm groups, senior citizens, parent organizations, local government, financial institutions, houses of worship, news media. Internal constituencies might include teachers, administrators, support staff members, students, board members.

Recruit Representatives. Now, ask each group to name a representative to join the leadership team. Or recruit the obvious individual opinion leaders that are already well known. Make sure, however, that you don't merely overload well-intentioned people who are already over committed.

Is every population group in the community represented?

Schedule an Initial Meeting. At an initial meeting for orientation and organization, ask the group to determine what important stakeholders might be left out. Are there groups newer to the community who are not represented? Is the group sufficiently diverse in terms of age, race, ethnic background, economic situation? Get the group going with at least an initial organizational framework–an interim chair or convener, someone to keep notes, perhaps, and, if your team is large, an executive group. Develop a consensus on the purpose of your work together.

Plan Your Schedule: At a subsequent meeting, work with your leadership team to develop a schedule of activities for the year and begin work on a marketing plan to keep the larger community informed.

Spread the Word. Schedule briefing sessions with key stakeholder groups on the schedule and purpose statement. At these sessions, get people involved in the process in an initial way by using a futuring activity, such as *Decades Brainstorm*. Consider using the activity called *Both Sides of the Trend* (pg. 67) as a way to get more people involved directly as you start your process.

Once you get key stakeholders involved, follow a few simple rules to keep them involved:

1. **Keep everyone's self-interests in mind.** People may get involved out of a sense of larger community good, but they'll need to see connections to their own interests to stay meaningfully involved. Help them see those connections.

2. **Make the larger perspective obvious.** Oftentimes, people need help to see how their own, perhaps small or one-time, contribution fits into the larger picture. Motivation is greater when they see how their own contribution fits into the whole.
3. **Define the task.** Don't keep people guessing about what you want them to do. Define the task, from the beginning, in terms everyone can understand. Don't be afraid to admit where you are feeling your way or plowing new ground. Be up front about what you see as the end point, and why community involvement is important to that objective.
4. **Make good use of everyone's time.** Plan meetings carefully, starting and ending on time. Share the agenda and ask for the group's consent to that agenda before you start. Keep activities focused and well-organized.
5. **Share the credit for results.** Make a habit of telling people that you appreciate their involvement. Give others the chance to take the credit for results achieved. Help people find ways to celebrate their successes, informally as well as formally.
6. **If you get in trouble, ask for help.** If the process goes awry or gets bogged down, don't be afraid to ask for help. Ask those involved to help analyze what to do next. Or get someone in from the outside. Don't focus on blame. Get things fixed and move on.
7. **Retain flexibility.** This may be a new process for many of us. Getting the community involved makes it even more complicated. Retain enough flexibility to change when changes are needed.

In every community, there is a pool of persons who are repeatedly asked to serve on advisory boards or special committees. They are the natural helpers in the system who somehow understand how to get involved, how to get resources, and how to get help from others. But relying on that pool alone, however well-intentioned, can also prove difficult, as an elementary school in Maryland learned.

With the aid of a team of 10 representatives selected from the broad school-community, this elementary school initiated site-based management. Its functions were three: assess the social climate of the school, assess the academic climate of the school, and develop an annual school improvement plan including objectives, activities, timetable and evaluation elements.

In an attempt to encourage more parental interest and involvement, the elementary school initiated, designed, wrote and distributed a 45-page handbook to parents, conveying information the school thought was important. Parents, however, felt intimidated by the handbook. They described it as being authoritarian, too long, and not containing the kinds of things parents felt were important.

Two-way communication was then initiated, helped by the school-community team. As a result, the handbook has since been redesigned as a two-pocket folder. It is easy to read and allows internal storage of report cards and other important papers. Most importantly, it provides information the parents thought important.

Another example comes from a Nebraska high school, to modify and add to its technology program. Several new computer labs were placed in operation and new courses such as *Principles of Technology* and *Chemistry in the Community* were added to the curriculum.

On each of these occasions, printed invitations were sent to the 52 primary businesses in the community. (Primary businesses were identified by the Chamber of Commerce as those with sizable payrolls and a high level of continued employment.)

When representatives from the businesses arrived to observe the new programs, they were greeted by students and school officials. Students led the explanation and discussion sessions. A reception for the business representatives concluded the activities. At the reception, one of the high school string quartets provided music.

The results were powerful. The business community received a first-hand look at the talent of the school—its students. Business people were introduced to new curriculum ideas and processes, their questions about the application of the knowledge were answered by students and staff, and they had the opportunity to walk through the hallways and be greeted by the general population.

Many of the business leaders who attended later served on school improvement teams at the elementary and secondary level, worked for and with the school foundation on school-related projects, and participated in programs to recognize student achievement.

Community Engagement as a Success Strategy

Clearly, leadership is a continuing issue for the school district and the community. Recruiting new people into leadership positions and supporting the initial efforts of emerging leaders is one of the most productive strategies for school success.

Community members who are given continuous and varied opportunities to help with educational decision making are much more likely to favor the school at all levels. Above all, the school district that works hardest to make citizen participation possible at all levels is in the best position to thrive in these challenging times.

Suggested Activities for Strengthening the School-Community Connection

Community involvement activities can range from one-on-one recruiting of a volunteer to speaking to a service club or at special events that gather the community together to talk about the school of the future. The following activities can be adapted to a variety of settings, but in general these activities can be used to develop a shared understanding and a team attitude among groups of volunteers.

The activities that are included are:

- Who Am I? A Getting Acquainted Activity
- School Strengths and Weaknesses: A Guided Discussion for Listening Trios
- Schools and Economic Development Exercise
- Decades of Change

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Who Am I? A Getting Acquainted Activity

Purpose: Allow each participant to introduce herself/himself to the group and to understand the varied resources and expectations within the group. The activity works very well with mixed lay and professional groups and as a beginning point for any working session.

Suggested Group Size: For groups of 30 or less, the activity can be managed with one-on-one contact. For larger groups, the activity can be managed by displaying each participant's completed paper so that all can be read immediately or in the course of the work session.

Time Required: The activity takes from 15 to 30 minutes depending on group size. Sufficient time is needed for each participant to complete a worksheet and then read others.

Materials: Paper, pencil and worksheets for each participant. Masking tape if display space will be used.

Directions:

1. The facilitator provides each participant with a sheet of paper which has been divided into four quadrants. Each with one of these headings:

Who I am	What I do
What I bring to this group	What I expect from this meeting

2. The facilitator asks that each individual work alone to fill in each quadrant.
3. After 3 to 5 minutes, the facilitator asks participants to share something from their lists. If the group is small, participants can walk around the room and exchange worksheets until everyone has seen every worksheet. Larger groups may tape the worksheets to a wall as a display and then take the time to read them immediately or at various points in the meeting. Facilitators may also ask individuals to offer examples from their list before the display is created.
4. The facilitator offers a summary from the following points:
   - A crucial element of planning for the future is an understanding of the makeup of the school-community, and the building of a pool of attitudes, skills, knowledge and abilities available.
   - During this activity, the group demonstrated that every school-community is composed of diverse points of view. All are legitimate.
   - Together, like pieces of a puzzle, these resources comprise the tools available to achieve the school-community's vision of a preferred future.

This activity not only helps participants understand the diversity of their own school-community, it allows the leadership team a perspective of the expectations and available resources upon which they can draw.

School Strengths and Weaknesses: A Guided Discussion for Listening Trios

Purpose: Provide a guide for discussion about the future of the school in an atmosphere that allows for maximum participation.

Suggested Group Size: The activity can be used with unlimited numbers of trios, provided that the room is large enough to allow for adequate separation to control for noise interference.

Time Required: This activity takes about 45 minutes.

Materials Required: A copy of *Questions for Discussion* for each participant. The list can be posted if the group is small enough that each trio member might see it.

Questions for Discussion

1. What is the greatest strength of our school district? What is the greatest weakness? Examples?
2. What was the best part of your school experience? Do you think that today's students have the same experience? Examples?
3. What is the greatest difference between schools today and when you were a student? Examples?
4. What threats do you think the future poses for our school district? What opportunities does the future offer to our school district?

Directions:

1. The facilitator briefly explains the goals of the activity, to guide discussion about the school and the future in a way that maximizes participation.
2. Participants are asked to form trios. Within each trio, participants identify themselves as ***A***, ***B*** or ***C***.
3. Copies of the *Questions for Discussion* are distributed by the facilitator, who gives the following instructions:

   Round 1

   - In each trio, Participant ***A*** is the first speaker, and chooses the question to be discussed from those listed.
   - Participant ***B*** is the first listener.
   - Participant ***C*** is the first observer.
   - The topic chosen is to be discussed by the speaker. To gain understanding, the listener can ask for examples, repeat or

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paraphrase what was heard, or reflect the feelings being expressed by the speaker.

- ❖ The listener must then summarize, in her/his own words and without notes, what was heard.
- ❖ If the summary is thought to be incorrect or missing some points, both the speaker and the observer are free to interrupt and correct any misunderstanding.
- ❖ The observer is to make certain that the listener does not omit, distort, add to, or interpret what the speaker has said.

4. The facilitator begins Round 1. After about 7 to 10 minutes, the group leader stops the process and responds to procedural questions. The facilitator should use this time to make sure that everyone understand the three roles of speaker, listener and observer so that the remaining rounds can continue.
5. The facilitator announces the beginning of Round 2. The Round 1 process is repeated, with participant ***B*** becoming the speaker, participant ***C*** the listener, and participant ***A*** the observer. The new speaker chooses his or her topic and begins. Again, about 7 to 10 minutes are allowed for Round 2, with the facilitator calling time.
6. The facilitator announces Round 3 and the switching of roles again. In this round, participant ***C*** becomes the speaker, ***A*** the listener, and ***B*** the observer. After 7 to 10 minutes, discussion is ended.
7. The facilitator conducts a brief summary of the activity by asking for volunteers to offer examples of answers they heard to the various *Questions for Discussion*. The activity concludes with the facilitator reminding the group that the purpose was to hold a discussion within structure that created maximum participation.

Schools and Economic Development

Purpose: Identify ways in which the school can contribute to the economic vitality of the larger community of which it is a part, then explore ways in which the larger community can directly contribute to the mission of the school.

Suggested Group Size: The activity can be managed with very large groups if smaller groups of 7 to 10 are seated at tables together.

Time Required: 60 minutes

Materials Required: Newsprint and marking pens are needed for small group activity. Masking tape is needed to display small group work. *Making the Connection* may be used as a handout.

Directions:

Identify ways in which the school and community benefit one another.

1. Group leader should have a copy of the *10 Strategies for Making the Connection: Rural Schools and Economic Development* for reference.
2. If available, a School District Vision Statement should be posted prominently in the room, and/ or distributed to participants as they arrive for the meeting.
3. The facilitator directs each table group to identify ways in which the school district and its personnel could, or already do, assist the larger community in economic development activities. Each small group is asked to brainstorm a list of ideas and write them on newsprint. They are encouraged to consider how all types of school personnel, including students, can or do contribute.
4. After about 15 minutes, the facilitator asks each group to report two ideas from their list. After each group has reported, other ideas are solicited from the full group. (For additional ideas, the group leader refers to *10 Strategies for Making the Connection: Rural Schools and Economic Development)* Lists may be displayed.
5. The facilitator then asks the small groups to brainstorm a list of ways in which the community can assist the school district in fulfilling its vision. Again, each small group is asked to brainstorm a list of ideas and write them on newsprint.
6. After about 15 minutes, the group leader asks each group to report two ideas from their list. Again, ideas are solicited from the full group after each small group has contributed to the list. Lists may be displayed.

7. In summarizing this activity, the facilitator notes that these idea lists will be important resources to the school-community's planning for the future. The lists can also be the source of ideas for special projects or task forces. *Making the Connection* may be distributed as a handout.

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10 Strategies for Making the Connection: Rural Schools and Economic Development

1. **Chamber-School Committee Membership.** Appoint educators to Chamber of Commerce committees; appoint business people to school committees. Ask participants occasionally to report to their respective boards on what they are doing.

2. **Joint School Board-Chamber Meetings.** Schedule regularly a joint meeting of the School Board and the Chamber of Commerce to share information relevant to economic development.

3. **Economic Surveys by School Classes.** Ask high school classes or clubs to conduct community surveys to help determine current economic activities, trends, and projections.

4. **Career Awareness Days.** Ask local employers to act as "mentors for a day" for high school students as a means of career exploration.

5. **Teacher-Business Exchanges.** Sponsor a one-day "job exchange" program, asking teachers to work in businesses and business people to work in schools. Hold a follow-up discussion.

6. **Entrepreneurship Education.** Sponsor a class in the high school on starting and operating a small business, with guest speakers from local businesses as an integral part of the instructional plan.

7. **School Facilities as Incubators.** Make available under-utilized school facilities as small business incubators. Hire students to provide support services.

8. **School-Based Businesses.** Initiate a program that will help students explore, start and operate businesses filling gaps in available local services.

9. **Joint Economic Development Planning.** Ask the School Board, County Board, Town Council and Chamber of Commerce to develop a joint area economic development action plan, using the unique strengths and contributions of each partner.

10. **Public-Private Partnership for Leadership Development.** Develop a public-private partnership for leadership development, focusing the program on developing local capacity and nurturing local resources that are critical to economic renewal.

Decades Brainstorm

Goals:

1. To help participants discuss the images of the past, present and future that influence their thinking.
2. To increase participation within the group.

Time Required: 15 - 30 minutes

Size of Group: No more than 30

Materials: Easel and newsprint and several markers or chalkboards and chalk.

Directions

On paper or chalkboard, group leader lists decades: 1950, 1960, 1970, 1980 and 1990. Judging the beginning dates by the age of the group, the leader asks participants to "brainstorm" what they remember about those years. Suggestions such as news events, songs, styles and weather can be offered. Participants follow brainstorming rules whereby all comments are recorded and not discussed or criticized. The leader must also judge the amount of time to be spent on each decade list and move the group through the past to the present and then ask the group members to predict what will be memorable about the future.

Comments

Because it dramatizes personal reactions and memories of changes, this activity is an excellent beginning for any group that wants to deal with the issues of change and the future. This activity can be used at the beginning of a meeting or work session to set the stage for a serious discussion or as an ice breaker that helps a group to relax and enjoy working together. It is used most effectively when the leader plans some time for comments that can service as a transition to a longer consideration of the impacts of change.

Writing a Vision Statement

When school and community leaders create a mental image–a dream–of the ideal school of the 21st century, they are envisioning a **preferred future**. They are envisioning the best possible future, given the best possible intervention of today's leaders. Sometimes school and community groups confuse the terms vision and mission and, in order to clarify, here are definitions of both terms.

Vision: a shared image of the preferred future of the school and community that guides long term development towards that future.

Mission: a statement of operational focus that guides day-to-day operations of the school or organization.

Some examples of Vision Statements are useful in drawing this distinction and in serving as models.

> *In our school and community, citizens own the school and act as if they do. Nearly everyone votes. School board meetings are sometimes heated, but the discussions are about curriculum and how to maintain the conditions that teaching and learning demand. The business community works closely with the school, providing support and opportunities for work-study, employment and retraining. The school looks like a community institution–and it is, but its reach is vast. It is connected to the much wider community of all educated people through the electronic exchange of data, video and other material. All students tap libraries from around the nation, and increasingly, the world.*

–***Vermont Vision of Education Reform***

> *In the preferred future, our community will serve as the connecting, sheltering support for our schools. Business and social services along with law enforcement and churches will be actively involved in the lives of students and families through school-community programs. Regular Town Hall meetings will engage citizens and students together to identify community assets and opportunities. Through all types of school and community activities, the generations will connect and welcome one another.*

–Excerpted from materials developed by the
Heartland Center for Leadership Development
Lincoln, Nebraska

Here is an example of a mission statement:

> *We expect to manage all resources available to us efficiently and effectively in order to provide a maximum benefit to the students that the community entrusts to our care day to day.*

Or, here's an example of a mission statement focused on public engagement:

> *Our school-community relations will be marked by a continuous process of authentic public engagement to consider the best ways to serve the community and its youth and to build a lasting and productive relationship between the school and its various constituencies.*

Both of these mission statement were developed from work of the Heartland Center for Leadership Development in various school improvement projects dating to the early 1990s.

Usefulness of the Vision Statement in Public Engagement and School Reform

A vision of the school and the community in the future should be a major element in public engagement in school reform. When developed and reviewed in a way that promotes consensus, a vision statement establishes the framework for school reform decisions and for judging progress over time.

Building a shared school-community vision means first imagining the preferred (not just possible or probable) future, then planning the actions necessary to achieve that vision. That process, ultimately, is the challenge of turning dreams into actions.

Vision statements are built on information about the needs of the school and the community, an understanding of trends that will influence the future and, most importantly, the realistic hopes of the participants in the process. Creating a vision of the future also requires time and space for reflection on what key principles, values and beliefs will undergird the efforts to rethink the teaching and learning paradigm and the definition of community itself.

It is important to include the community in planning for the future.

Because schools depend increasingly on the support of taxpayers who have no school-age children, it has become more and more important for school leaders to include the community in planning for the future. In fact, the creation of a shared vision statement and the review of that statement community-wide, is an excellent way to build the relationships that protect and nurture the school through all types of economic and social change. Certainly community residents who only hear about the school during campaigns to pass bond issues have a different and more limited perspective than the citizens who have had many opportunities to be engaged in school planning and programing.

Furthermore, many parents and other community members are relatively complacent about their own local schools. Even in a time when headlines breed mistrust about public education, opinion polls show that many citizens typically do not perceive a need for significant change in their own local schools. Through a step-by-step process to create a shared vision of the future, community members can learn more about the school, why it must change, and how to continue to participate in rethinking what schools and communities must do together.

Building the Base for The School-Community LeadershipTeam's Work

Creating a shared vision statement can offer a beginning step for the school-community leadership team's work. Success in creating and then achieving the vision of the future is directly related to the numbers of people who have been involved in it. The team can use a variety of techniques to create a shared vision statement and then develop opportunities for a wide variety of community review and comments.

While every leadership team will have to adapt guidelines to fit local circumstances, here are a few general principles about vision statements and community review.

- Small groups or subcommittees can do the actual writing of a short vision statement if a larger group can contribute ideas, phrases, and key themes.
- Community review can take the form of posting the vision statement in stores, on community bulletin boards, in newspapers, cable television announcement scrolls, etc. It's the exposure that's important.

  Any simple process can be used to collect comments. Even a version of the suggestion box or a space for return comments on a coupon-size copy of the vision statement can work.
- It's acceptable if no changes are suggested. After all, the vision statement is based on values, hopes and aspirations for a preferred future; it's likely to encounter acceptance, but the review is still important.

Suggested Activities for Creating A Shared Vision Statement

Several techniques may be used to create school-community vision statements. Three techniques are presented here.

- A Five-Step Process for Visioning
- Scenario-Building
- Directions for a Visioning Activity

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A Five-Step Process for Visioning

This five-step process represents a series of activities that can organize the creation of a vision statement for a school or school district. This group should be a manageable number and be representative of the school-community. This process originated in a K-12 school district with 500 students.

Step 1: Decide on the membership of a Steering Committee.

The duties of the steering committee include the review and analysis of proposed vision statements and the writing and editing of a draft vision statement for public review.

Step 2: Publicize the opportunity for submitting a vision statement.

Students, teachers, any school staff members, parents and any community members are invited to submit a one-page statement of what the ideal school would be like. The vision statement should answer these questions:

1. How should we teach and learn in our ideal school?
2. What kind of organization should our ideal school be?
3. What will our graduates know and be when they leave our ideal school?
4. How will our ideal school relate to the community?

Some vision statements may be solicited. For example, a creative writing class might be asked to contribute. Or leaders among the teaching faculty and staff might also be invited to submit a draft. A parent group or service club might be asked.

Step 3: Each member of the steering committee also submits a draft vision statement reflecting her/his own ideas.

When all submissions have been collected, the steering committee first reads each and then divides the total among the committee members for analysis.

In order to analyze the vision statements, steering committee members are asked to read each statement and record the most frequently occurring ideas, themes or words and bring that listing to a work session.

Step 4: At the work session, each steering committee member's list is displayed on newsprint and the group works to identify similarities.

A new list of shared ideas, themes and words is created. Using this list as a touchstone, the group outlines and then together writes a statement of vision incorporating the shared ideas, themes and words.

Step 5: The draft vision statement should be reviewed by the school and community in some way.

A "Town Hall Meeting" on the vision for the school is one way to build support and communication with the community at large. Perhaps reading the vision statement can be part of the agenda at a school board meeting, student organization meeting or parent group meetings. Comments can be collected informally or formally (through a public hearing).

The steering committee should meet for one last work session following the public review in order to consider comments received and edit or make any revisions. Whatever the revisions, a final formal adoption at a school board meeting is suggested.

Advantages/Disadvantages

This five-step process requires an active, well-organized facilitator to support the steering committee. If possible, such a facilitator might be more effective if she/he were an "outsider," rather than an employee of the district, although the process can be managed by a staff member or teacher.

The entire process can take from three to six months. The shorter time frame can keep the process interesting and vital by compressing time between work sessions and public meetings, to keep interest in the process high.

The composition of the Steering Committee is vital, as so much responsibility and control rests with this group. Membership on the Steering Committee should be carefully considered to cover political dimensions and to deal with issues of credibility and follow-through.

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Scenario-Building

A second technique for creating a vision statement with a group of people is scenario-building. A scenario is an outline or script for the future, which can be used in single or multiple form.

Ideas for writing scenarios can be generated through small group discussions. Trends (such as the increased use of computers, site-based management, long-distance learning via satellite, or parents as teachers) can be used as parameters.

Step 1: Ask the group to develop a scenario of the ***probable future*** that will occur in 10 or 15 years if the community does nothing differently. This scenario gives some thought to the impact of trends, and then extends the present: The gradual decline of population, for instance, if the school were not equipped to support the community's efforts to attract or retain young families, might result in a scenario of a much smaller school and community.

Step 2: Next, the group is asked to develop a scenario which describes a different or a ***possible school-community future*** if a strategic outlook process gets the school-community organized and actions are taken. This scenario might describe creation of a school-community project to increase day-care and distance learning opportunities, thereby attracting young families, resulting in a substantially different population.

Step 3: Reviewing the contrasts in characteristics of the probable and possible futures available for the school-community, the group can then be asked to identify which aspects of these two descriptions are preferred. As these **preferred futures** are listed, the group leader should remind the participants that the idea of preferred futures is an important component of a strategic planning or school improvement process which first defines the future we want and then allows us to analyze what is needed to make that future come true

Advantages/Disadvantages

The scenario technique requires lots of time and creativity. As a first step for creating a school vision statement, it can be used successfully with memberships of service clubs or with high school classes.

Sample Agenda for a Work Session

The leaders of a work session on writing scenarios might use the following agenda (which is very flexible and can be adapted to special needs of each community):

7:00 p.m. Registration and Coffee

- ❖ Participants get name tag, agenda and evaluation sheet

7:30 Share agenda

- ❖ Purpose of the meeting
- ❖ Introduce activity facilitator

7:40 Share project information

- ❖ Explain why a vision statement is important
- ❖ Discuss importance of future to school-community
- ❖ Emphasize value of discussion and citizen participation

7:45 Visioning Activity

1. Divide the group in half
2. To one subgroup, assign the task of describing the future of the school district community if nothing different is done.
3. To the other subgroup, assign the task of describing the future if a systematic restructuring process occurs.
4. Explain that they have 30 minutes to work on their scenario descriptions, and to record their work on newsprint, as a series of phrases or in narrative form.

8:20 Reports

- ❖ Ask each subgroup to report on its work
- ❖ Help the group decide how to refine the two scenarios (transfer information from newsprint to paper, further refinement by committee, etc.)
- ❖ Ask for ideas about how to involve others in discussion of the two scenarios.

9:00 Closing and Evaluation

- ❖ Explain the need for another work session to build on these scenarios, then create a school district vision statement.
- ❖ Participants fill out evaluation sheets: *What did you like about tonight's meeting?*

9:15 p.m. Steering Committee meets to read evaluation forms and discuss next steps.

- ❖ What would you have changed about this meeting?

Follow-up Activities

The leaders' task, once these scenarios are developed, is to publicize them so that many community members are involved in hearing or reading these alternate views of the future. In such a process, it's better to avoid "disaster" scenarios. In the long run, scenarios that extend a negative trend to a dire extreme are neither productive nor helpful. They don't motivate people as well as positive scenarios do.

Directions for a Visioning Activity

Here's a simple process for creating a community Vision Statement using small work groups and basic brainstorming techniques.

1. The facilitator asks each participant to consider the preferred future for the community. The word **preferred** is stressed so that participants imagine the ideal future, not necessarily the probable or possible future. The questions might be framed in either of these ways:
   - *What must our schools be like to make sure that our community is thriving 25 years from now?*
   - *What must our community do to make sure that our children live happy and productive lives?*
2. Each participant writes down two or three words or phrases that express the preferred future. Examples might be: progressive, stable, prosperous, caring, environmentally sensitive, full of young families or lots of jobs.
3. After a few moments of reflection and individual writing, the facilitator leads the group in listing their ideas. In turn, each participant offers an idea from her/his list. The listing continues until all ideas are recorded.
4. At this point, the facilitator can lead a brief discussion about the list, asking for clarification if needed.
5. Either as a group or by means of a smaller subcommittee (no fewer than three) the group then uses the list as a basis for writing a Vision Statement. If a smaller subcommittee does the writing, the draft should be reviewed by the whole group and revised if necessary.
6. The draft Vision Statement is then ready for community-wide review. The group should devise a means for recording reactions so that if a pattern emerges, revisions can be made. For example, if the draft Vision Statement is presented to several service clubs and many comments are received noting the omission of any mention of attracting retirees, an addition may be made to the Vision Statement.

Chapter 3: Identifying Issues

The Importance of Identifying Issues

There are several reasons why identifying issues is so important.

First, identifying issues helps to focus the effort of those parts of the school and community that are most important and most likely to be involved. School leaders are faced with an endless series of problems and issues to be resolved. One way to develop a perspective on the future is to examine issues and decide which to address and in what priority.

Second, the actual process of identifying issues can build a shared understanding of the current conditions which must be considered when planning for the future. That shared understanding is the most necessary element to building a vision for the future.

Third, identifying issues can provide a very helpful tool in managing conflict. If school critics have an opportunity to help identify issues, their involvement becomes a means to channel negative activities into a more positive framework.

Fourth, focusing on key issues provides a perspective for the search for community assets that might be applied to these issues.

Sources of Existing Information: Local and State

Issue identification should not depend solely on school and community leaders' opinions and perceptions. Information about trends external to the community are important, as is information about school effectiveness.

It makes sense to explore existing sources of data collection and analysis as part of issue identification.

Some local sources of information include:

- **City/County Government**
- **Chamber of Commerce**
- **Economic or Industrial Development Corporation**
- **Retail Association**
- **Major Employers**
- **Hospitals/Nursing Homes**
- **Senior Centers**
- **Main Street Programs**
- **News Media**
- **Internet**

Some areas are also served by multi-county organizations such as Educational Service Units, Community Colleges or Regional Councils that may provide useful information.

At the state level, other sources of information may be tapped for information about the county or multi-county area. State level sources include:

- **State Agencies (such as the Departments of Education, Labor and Economic Development)**
- **Library Commission**
- **University Departments**
- **Special Service Centers within Departments (such as the Bureau of Business Research or the Center for Public Policy Research)**
- **Cooperative Extension Service**
- **State Legislative Offices**
- **State Offices of Congressional Delegations**

State and national associations also offer access to research on issues and important trends.

Combining Information Sources

An important aspect of issue identification involves the combination of information sources. The strongest approach for recognizing issues and the approach that allows for the most confidence in the outcome is one that combines quantitative with qualitative information.

For example, using the results of a population study based on the latest census data may lead a school leader to make certain assumptions about labor market needs and growth or decline that would indicate that job preparation is absolutely the top issue for the school in the future. However, when that quantitative information is combined with qualitative information such as the results of student focus group discussions or small group sessions at a town hall meeting, it may be that education about healthy lifestyle is considered to be as or more important by the community.

It's crucial to the success of a local school reform effort to combine judgment, intuition and a perspective of local history with the vast array of quantitative data available. While it's possible to be overwhelmed by the amount of information at our disposal, it's more important than ever to realize that the future cannot be simply a projection of the past. Issues that have been significant for many years might not necessarily be the most critical for the future.

Potential for Conflict

Some school leaders may be reluctant to engage in any issue identification activity because of the potential conflict. Conflict is a natural and expected part of the operation of any public institution and schools are no exception. The pluralistic and diverse nature of American communities makes conflict over public resources inevitable. However, it may be that the school districts that can manage conflict are the schools that will thrive in the future. Rather than viewing issue identification as a source of conflict, it should be seen as a mainstay for conflict management. Through broad-based community involvement and the development of shared perspective, issue identification can serve as a channel for making criticism useful in a school-community engagement effort.

Many issue identification processes deal with building consensus. Consensus is often referred to as a result of a group activity such as setting a priority.

Consensus means a general agreement or group solidarity around an idea. Consensus, practically speaking, means that all group members can accept a decision but not necessarily that the decision reflects everyone's first choice. Consensus, then, is not unanimity but rather a judgment arrived at by **most** of the group, which all group members are willing to support.

School and community representatives who have thoroughly discussed information about the school's future can then develop a list of issues together. If they also set priorities, a powerful base for a local school improvement effort has been created.

Suggested Activities for Identifying Issues

These activities reflect three main themes in identifying issues. First, the discussion of existing information, second the identification of issues and, third, the ranking of issues in order to set priorities.

The activities include:

- Talking About Data: Guiding Group Discussion
- Images of the School: A Guided Discussion
- Listing and Ranking Issues: A Group Activity

Talking About Data: Guiding Group Discussion

Purpose: This activity is used to help groups discuss data in the form of reports or survey results.

Suggested Group Size: Any number of small groups, each no larger than seven, is manageable for this activity.

Time Required: Depending on the type of data to be discussed, 15 to 30 minutes should be allowed for participants to review the materials (report, survey results, etc.) At least 45 minutes is needed for the discussion session. The larger the total number in the groups, the longer the report time from each small group. With a group of 30, the total time need for review, discussion and report back is about two hours.

Materials Required: Copies of the data (report, survey results, tables, etc.) to be discussed. Ideally, each participant need her/his own copy. Executive summaries may also be used.

Directions:

1. The facilitator introduces the activity by briefly describing the source and background of the data. A brief question-and-answer period may be necessary to make sure that there are no unresolved questions about the source of information.
2. The facilitator distributes the copies of the data and asks participants to review and "skim" the materials.
3. Small groups of 3 to 8 are organized around tables. The facilitator instructs each group to name a recorder/reporter and then asks the group to work together to answer the following questions.

   a. Referring to your copies of the data, what is an example of information that surprised you?

   b. Referring to your copies of the data, what is an example of the information that validated something you already knew?

   c. Referring to your copies of the data, what is an example of information that needs more explanation?

   d. The facilitator instructs the groups to take about 15 minutes on each question. The groups may provide more than one example for each question. The recorder/reporter should be prepared to share the small group's work with the large group.

   e. During the discussion time, the facilitator should check in with each small group to observe their progress and answer questions. Groups should also be told when to move to the next question with about 15 minutes allowed for each.

f. After the discussion time is completed, the facilitator leads the report-back session by asking each small group in turn for one answer for the first question. This continues until all groups have reported all examples or the facilitator judges that sufficient time has been spent on the first question. The process is repeated for the additional questions.

g. The facilitator concludes the activity with a summary statement about the data and the group's response. Next steps might include planning to provide additional explanation or clarification of some of the data, as the responses indicate.

Images of the School: A Guided Discussion

Purpose: This activity is designed to initiate discussion about the positive and negative images of the school. The participants will have the opportunity to analyze the relationship of these images to issues critical to the local process. The activity will produce both positive and negative images and a list of issues. (The same activity could be used to focus on the image of the community.)

Suggested Group Size: Any number of small groups (each with 3 to 8 people) clustered at tables.

Time Required: About 45 minutes is required for the activity when working with a group of 30. If the total group is larger or many small groups are formed, reporting back to the large group may take additional time.

Materials Required: Paper and pencil are required for each participant. Overhead projector and pens or newsprint for the facilitator.

Directions:

1. The facilitator briefly introduces the activity by discussing the importance of image. Reminding the group that image isn't always built on reality, the facilitator may ask for examples of their state's image to "outsiders." For example, many people think of all New Yorkers as being "unfriendly" or all Iowans as farmers.
2. The facilitator asks each small group to imagine that they are working as a team of writers for a late-night talk show. Their task is to develop jokes about schools. They may want to consider what would people ridicule about our schools? For example, "Our schools are so small that..." Each participant works alone first and then shares with the small group.
3. After 10 to 15 minutes, each small group is asked for an example of one of their jokes. The facilitator receives each report, listing on newsprint or overhead the negative concept in the joke.
4. Small groups are then instructed to imagine that they are working on a brochure for recruiting businesses and families to their town. Their task is to list positive images of the school, in the form of

phrases or slogans that might be used. A recorder/reporter is needed in each group.

5. After 10 to 15 minutes, the facilitator again asks each group in turn for one example and continues to list on overhead or newsprint the positive concepts in the images.
6. The two lists are then compared and the group is asked to consider what issues form the basis for the two lists. The facilitator can list issues or discussion points on the overhead or newsprint.
7. The facilitator concludes the activity by reminding the group that images are developed and can be influenced by planning activities such as the one we are engaged in now.

Listing and Ranking Issues: A Group Activity

Purpose: This activity can be used to generate a list of critical issues. In addition, the structure allows a group to rank in those issues in importance. The activity also builds consensus on issue identification and importance.

Suggested Group Size: An unlimited number of small groups, provided that sufficient wall space for newsprint display is available.

Time Required: About one hour is needed to complete the activity. More time may be needed for a very large group such as a town hall meeting.

Materials Required: Paper and pencils for each participant. Newsprint, markers and tape for each small group.

Directions:

1. The facilitator introduces the activity by briefly describing the importance of identifying issues (no more than 10 minutes). The following points might be used.

    - Leaders are faced with an excess of issues and have to narrow the focus in order to get to action
    - Issues surface through discussion and analysis
    - Opinions and judgments are important in the identification of issues

2. Each participant is asked to write down the three most important issues facing local schools in the future. About five minutes are allowed for individual work.
3. After each individual completes that task, the facilitator directs the small groups to share and develop a group list of 3 to 5 issues agreed upon by the group as critical for the future. About 30 minutes are allowed for this work.
4. The facilitator stops the small group work and asks for reports. Each small group, in turn, offers one issue and the facilitator writes these on newsprint allowing space between each issue. The reporting and listing continues until all groups have all issues listed. No duplicate issues are listed. Each sheet is displayed at eye level in an area that is accessible to all participants.
5. The facilitator distributes 5 self-stick dots to each participant and directs the individuals to go to the newsprint list of issues and

"vote" with their dots. Participants may place all 10 dots on one issue or distribute as they wish.

6. During a break, the facilitator counts the dots and when the group reconvenes, reports back to the group the ranking that has resulted. An overhead or newsprint list of the top five issues may be used by the facilitator.
7. The facilitator concludes the activity by complimenting the group on the discussion that went into identifying and ranking the issues. If next steps are known, the facilitator should describe what will happen next. For example, the participants may be asked to volunteer for a study group or task force on each of the top three or five issues.

Chapter 4: Mapping Community and School Assets

Overview

After the school-community leadership team has created a shared vision statement and involved the public in the identification of issues, it's time to consider the assets of the school and the community that might be brought to bear on those issues.

Asset mapping has been in use as a planning tool for several years and has won many advocates as an alternative to traditional needs assessments as a way to bring citizens together in order to take action. The notion of documenting or mapping community assets gained prominence when, in 1993, Northwestern University published *Building Communities from the Inside Out,* by John P. Kretzman and John McKnight. Based on their work in Chicago-area neighborhoods, they argued that communities are literally filled with assets and yet only a few are ever used for community building.

Assets, as defined by these two scholars, fall into three major categories:

- ***Capacities or gifts of individuals, including such basic skills typing or working on machinery and extending into skills requiring more training or experience such as sales or employee supervision.***
- ***Strengths of voluntary associations, such as civic clubs, parent-teacher groups or recreational clubs.***
- ***Resources of formal institutions, including schools, churches, government offices and health care centers.***

To this list of assets, you might also add physical and monetary resources. Many of the community developers who've been working with the asset mapping approach suggest that communities, especially smaller or impoverished ones, can make more progress if they build from an asset base rather than focusing on their deficiencies. The idea here is that assets should be mapped, that is, listed and analyzed to determine how best to mobilize them for community betterment.

Of course, this mapping process can take the form of a graphic representation of the assets using symbols or designs to offer a picture of the community. An asset map is intended to show the presence of assets but not necessarily the actual location of each; rather, the term mapping refers to the action of identifying, analyzing and representing the assets.

The Heartland Center's Approach

The Heartland Center for Leadership Development has adapted the model of asset mapping to include an important first step: issue identification. While using asset mapping as part of a public engagement process for school reform, teams can use the identification of a local issue as a way to focus the asset mapping activities. Think of a team that identifies increasing vandalism as a significant local issue. As the team works on asset mapping, they'd be identifying individual skills and expertise, local associations and institutions *could be applied to this issue.*

Identifying a significant issue targets the asset mapping and makes using the collected information immediately useful for goal setting, strategy development and action planning.

In other words, with an identified issue, the task of asset mapping is manageable and the results are put to use to mobilize the community to action.

Mapping Individual Assets

One way to think about individual assets is to list the kinds of individual gifts that are useful for community building in general. These might include office skills, caring and healing skills, construction skills, etc. Kretzman and McKnight's categories also include maintenance, transportation, equipment operation, food services, security, sales and supervision. To this list might be added other skills areas, such as professional/technical, entertainment and communication, and leadership, as suggested in 1995 in *Community Resources and Community Opportunities,* a paper prepared for the Nebraska Rural Development Commission by Buzz Kalkowski. Beyond these categories of individual assets or gifts, McKnight and Kretzman also added communication skills and enterprising skills.

School-community leadership teams are encouraged to adapt the sample *Mapping Community Assets* list at the end of this chapter to deal with their target issue. The sample list suggests some categories and examples of individual assets but shouldn't be seen as all inclusive. The team will have to add or delete items as needed and the discussion of what skills and experiences might be useful for dealing with the local issue is itself a great way to think about the wonderful assets and advantages already in the community.

Voluntary Associations

Voluntary associations, such as service clubs and church groups, often provide the most important opportunity for community residents to try out leadership skills, learn how the community functions, and engage in local democracy on a small scale. Some researchers, notably Robert Putnam of Harvard University, have popularized this aspect of community under the topic of *social capital,* meaning the social or civic network of interactions that helps a community function a whole, rather than just as a collection of individuals.

The community map of associations includes many categories such as interest groups, age-related groups, support groups, sports leagues, and so on. Even the smallest communities have several of these associations. They may be connected to a community institution, such as a church or a national organization such as the Lions or the Business and Professional Women's clubs. More often these groups are strictly local, often with a long-standing tradition and focus of activity on the community's behalf.

School-community leadership teams are encouraged to list as many of these groups as possible, then to analyze them by mapping (listing) the key assets of each that might be used to deal with the local issue as identified. Some of these association assets might include:

- **membership (both the individuals and the mailing list)**
- **mission or purpose (might have an interest in the team's issue)**
- **recent programs or projects**
- **connections to national organizations**

These assets can be documented along with basic information about the organization such as offices, phone numbers and mailing information.

Formal Institutions

A community's formal institutions constitute the location or ownership of a community's key physical and financial resources, in addition to a potential work force and equipment that might be used to respond to the issue. Except for private property, most of the "public" land, buildings and other tangible resources probably are owned by formal institutions. Examples of these are:

- **schools and colleges**
- **banks, credit unions**
- **hospitals, clinics**
- **places of worship**
- **police and fire stations**
- **social service agencies**
- **government offices**
- **news media**

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As with associations, asset mapping includes the listing of the resources of these types of institutions that might be useful to the team as it deals with a local issue. Is a meeting place needed? Is there a need for printing or copying equipment? Would a "borrowed" executive help lead a project? Could a group of staff volunteers be recruited? Here are some other examples of institutional resources:

- **facilities**
- **equipment**
- **staff volunteers**
- **staff expertise**
- **financial contributions**

The school-community leadership team will have to consider the local institutions and, after analysis and discussion, identify the types of resources these institutions represent. This is done, once again, while keeping in mind the local issue and how these assets might be brought to bear on that issue.

Suggested Activities for Mapping Community and School Assets

- Mapping Individual Assets
- Mapping the Assets of Citizen Associations
- Mapping the Assets of Local Institutions
- Starting a Community Skills Bank

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Mapping Individual Assets

Here's a sample list of individual skills that might be applied to a local issue. After you've identified such an issue, review the categories and skill examples. You might want to add or remove some as your team discusses what will help with the issue you've identified.

Issue: ____

____

____

Category	*Skill Example*	*Category*	*Skill Example*
Healing and Caring	caring for the sick caring for the elderly led a support group hospice activities health care/medical worker foster parent welcome wagon/ hospitality other	**Information Services**	receptionist switchboard operation bookkeeping shorthand or speedwriting word processing desktop publishing data entry filing and organizing files keyboard : wpm_____ mass mailings e-mail/ internet other
Supervision	writing reports filling out forms planning and assigning work for others making a budget keeping records interviewing other	**Construction and Repair**	painting building tear down wall papering furniture repair plumbing concrete work installing windows carpentry other
Food Services	catering serving to more than 10 clearing/setting tables for more than 10 operating commercial equipment bartending baking other	**Landscaping**	designing landscaping planting and maintenance gardening (vegetables) farmer's market or stand beautification projects

Category	*Skill Example*
Entertainment	singing dancing directing others in productions playing an instrument writing skits and reviews making scenery making costumes
Advertising and Promotion	design brochures plan marketing campaigns write news releases write public service spots develop slogans and songs develop special events, celebrations other
Sales	operate a cash register sell products wholesale sell products retail door to door sales telemarketing home product parties other
Community/ Leadership	elected office appointed office membership in civic club office in civic club adult leader for youth club survey or census interviews fund raising events community celebrations community clean up projects political campaigns other
Enterprising	started a business expanded an existing business consulting services invented a product or service obtained a franchise other
Hobbies/Interests	skills you could teach/ share list special interests other

Mapping the Assets of Citizen Associations

Here's a list of various types of citizen associations. Your team should try to list as many as possible from your community. Consider each association in terms of the strengths as described here and how these strengths might be applied to the issue your team has identified.

ISSUE: ____

____

____

Type of Association

artistic
church-related
ethnic
local media
service clubs
study groups
youth groups
business
elderly
health and fitness
political
social causes/philanthropy
veterans
other

Possible Strengths

membership:
number, type, location of members?
potential use of mailing lists?

Age/Tradition/Reputation
new or long-standing? known for a speciality?

Mission
single focus? target audience?

Programs or Projects
community service activities, special events, fund-raising expertise?

Resources
staff? offices or building?
financial resources?

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Mapping the Assets of Local Institutions

The team can use this work sheet to identify local institutions and then consider what resources those institutions might represent. Remember to consider this information in terms of the issue your team has identified and how these institutional resources might be targeted for involvement.

ISSUE: ____

____

Local Institutions

local government offices
parks
clinics
private colleges
national guard, military reserves
churches
law enforcement offices
county agents office
schools
hospitals
community colleges
business schools
social service agencies
news media
federal government offices

Possible Resources

facilities?
buildings, meeting rooms, parking lots?

Materials

printed materials, video and tape resources, web sites

Equipment

tables, chairs, coffee makers, computers, vans

Purchasing Power

discounts for mass orders

Employment Practices

hire locals? any priorities allowed?

Training Opportunities

in-house training as a chance for others in the community to learn skills, etc.

Financial Capacity

contributions to local charities, projects, etc.

Advocacy and Influence

special groups that might be targeted for involvement

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Creating a Community Skills Bank

Every community has an inventory of assets that are represented by the people, the informal groups and the formal organizations or institutions in the town. These three levels are made up of individuals, informal associations such as service clubs, and highly organized institutions such as churches and businesses.

A detailed list of community assets at all three levels would constitute a local resource directory, or "Community Skills Bank." The Community Skills Bank is one way to maintain an inventory of these assets, identifying local skills and resources that can be brought to bear on community problems.

For example, a retired teacher might be experienced in writing grant proposals. A service club might have a long history of success in local fund raising for community betterment. Perhaps the school has up-to-date computer equipment or software.

Any community asset can be applied to a community project, but assets are too easy to overlook when they are not listed in black and white and accessible to leaders of community projects.

A Community Skills Bank is a document that can serve as an internal resource directory for people, groups and organizations in the community that represents assets waiting to be applied.

Here are some steps to consider in beginning the on-going process of creating a Community Skills Bank. These steps will take two to four months to complete.

1. Recruit a working committee or task force with 6 to 10 members. (A higher number will insure continuation even if some volunteers have to drop out.) Tap into a service club or two as co-sponsors to provide for built-in accountability.
2. Conduct a first work session to review the approach to Asset Mapping described in these materials.

   Before you adjourn, brainstorm a list of individuals, associations and institutions that are key to your community's future. Develop a list of individuals that has 10 times the number of members of your working group. List 15 associations and 10 institutions if you can.
3. At a second meeting, decide how to conduct an individual capacity inventory. Then decide how to gather and list the assets of the associations and institutions that you identified previously. Information about each individual, group and organization could be collected by in-person or telephone interview. Spread the work around so no one person has too big of a job.

4. Once initial information has been collected and organized, call a community-wide forum or town hall meeting to discuss the Community Skills Bank and to offer individuals and groups the chance to comment. Use a small group process at the meeting as a way to invite substantive contributions and additions.

5. Completed capacity inventory sheets (asset maps) will have to be compiled in some manner and duplicated so that all the information is together in one place. This is a good opportunity for high school classes to get involved in producing a document that can serve as a resource to the entire community. Use three-ring binders as a cover for your Community Skills Bank information so you can add to these inventories handily over time.

6. Make sure that any group or service club that's working on a project gets a copy of the binder. The local library should also have a copy. Most importantly, keep the information visible. Refer to it often so that it becomes a well-used resource as planning begins for any community project.

7. Plan for some publicity around the completion of this effort. If young residents are included in the Community Skills Bank, look for photo opportunities that show young people with the binder at the school library or in city hall.

8. Try to keep track of how the information was used. If a service club found a new set of helpers for a community clean-up day or a volunteer writer was recruited to help with a newspaper column, it means the Community Skills Bank is working.

9. Build in an annual get-together to update and add names and information to the collection.

10. Consider ways to say thanks to contributors and volunteers who get requests for help as a result of the Community Skills Bank.

11. Once your Community Skills Bank is underway, consider maintaining a similar three-ring binder as a Community Successes File, so you have a record of successful projects and other community "wins" that can be maintained over time. Use this file as a way to review past successes so you can learn from them to create more successes in the future.

Chapter 5: Developing Your Action Plan

Many community volunteers find action planning the most exciting and motivating part of any school-community effort. This is definitely the stage in the process of public engagement when the team will be able to recruit more helpers because of the concrete nature of the tasks at hand. The dimensions of short time frames and immediate action are very helpful in expanding public engagement. Individuals who might be frustrated by time spent on identifying issues and creating a vision statement will step to the forefront to get to work on a real time project.

Setting Goals

However, the step of setting goals with a team is made easier by these previous activities. When key issues have been identified and serve to focus asset mapping, and when a vision statement has collected hopes for the future, then goals emerge from the combination of new information and opinion that's been gathered. Goal-setting should be relatively simple if the activity is nested in the background of vision, issues, and assets. Goals answer the question, *What should we do differently?*

In general, goals start the movement from vision to action. Goals should be:

- **realistic and achievable**
- **clearly tied to the vision that's been developed**
- **focused on the issues that have been identified**
- **matched with the community assets that have emerged**

Suppose a team decided to target the issue of weak school-community relations. Here are some sample goals that would address that issue:

Goal: ***Build relationships among key sectors of the community such as school, business, social services, churches, etc.***

Goal: ***Increase the sense of ownership of the schools on the part of community residents.***

Goal: ***Connect the school and the local economy.***

Consideration of each of these examples would require the team to examine the assets that had been identified as well. In this way, individual experiences and expertise, the strengths of local associations and finally the resources of nearby institutions could be brought to bear on the issue.

Developing Strategies

The next step is to develop strategies based on goals. Strategies answer the question, *How do we get it done?* Sometimes, those volunteers who arrive at a Town Hall meeting or public engagement opportunity will have already arrived at this point in their own thinking. These people will have focused on an issue that's important to them and decided on a specific action or response and moved immediately to the strategy they believe should be employed. It's common for some expressions of frustration to be evident when the team takes the community through a systematic process and arrives at the strategy development stage after lots of work has been done setting the stage.

While it's understandable that an individual can have a strong sense of urgency about an issue and a personally held idea about how to handle an issue, it's vital that a team take the time to step back from this position. Taking the time to identify issues *as a group*, create a shared vision and explore local assets does take time but it improves the final results greatly. The time spent on these steps also brings more community residents to the table, allows for expanded participation and keeps a project from being identified solely with one individual or group.

The very best strategies for action include some consideration of these characteristics:

- **significant impact**
- **small or reasonable cost**
- **short time for completion**
- **high visibility**
- **uses the assets that have been identified in the school and community**

Not every strategy will match these characteristics perfectly, but these make an excellent filter for deciding which strategies to select or which ones to start working on first.

Building on the examples of goals already discussed, here are some examples of strategies that a team might develop.

Goal: Build relationships among key sectors of the community such as school, business, social services, churches.

Strategy: Recruit a task force of representatives from the various sectors to exchange information with the school on issues of mutual concern.

Note: Useful assets might include an AARP volunteer with experience in meeting facilitation, a school class on current issues that could prepare some background papers for discussion, and the American Legion which, as an institution, might offer meeting space.

Strategy: Create a school intern program that will bring students into the workplaces of community sectors.

Note: Useful assets might include school staff with experience in the management of an intern program, the local Chamber whose membership could sponsor internships with businesses, and a nearby community college that could offer a beginning class on business and the local economy for interns and their sponsors.

Strategy: Create a mentoring program that will bring adults from the community sectors into the schools.

Note: Useful assets might include the list of previous volunteers from lower grades that could be recruited for high school mentors, a service club like BPW or the Lions that could target its membership for mentors, and a state chapter of a national organization such as Big Brothers that could offer support and training for mentors.

Defining a Project or Activity

Obviously, a project or an activity must flow logically from a goal and one of the strategies and make use of identified assets (individual, association or institutional). Generally, the more your project will produce a visible result, the more effective your school-community leadership team will be. That's especially true with short-term projects since part of the expected outcomes of public engagement in the school reform effort is to increase the community's support of locally driven efforts to build and strengthen both the school and the community.

Here's another example. Suppose this was the vision statement that the team developed:

Vision: In the future, our community and school will be free of the negative impacts of any type of vandalism and serve as a source of pride for students, families and all residents.

And the team, along with a representative group of community residents identified several issues and selected this one to target.

Issue: Increased vandalism events in the community

A goal that might emerge from this combination would be:

Goal: Strengthen community identity and pride

Strategy: Create several events that celebrate the community's identity and heritage

Assets: Individuals with information about the community's past as a source of ideas for heritage events, individuals with expertise in desktop publishing, newsletter writing, brochure and poster development, event planning, service clubs or associations with membership lists for mailings, a tradition of sponsoring public events, and institutions like the historical society or department of tourism that might have staff, funds or supporting materials to offer.

At this point, the team could use brainstorming to list activities that would get this strategy into action. They might decide to:

- research and identify three heritage ideas for public events
- seek outside funding to help with these events
- develop a publicity campaign to increase awareness of community identity

Implementation Steps

This phase is critical to the success of the public engagement process because if, in fact, individuals take on responsibility to complete some task by an agreed upon time, then the vision will become action and progress will be made.

Several considerations can make this part of the process more successful.. First, *break tasks into small, manageable assignments.* Any assignment will seem more do-able if divided into smaller parts. Second, *assign pairs to work together on tasks.* By teaming volunteers to work on tasks, accountability is built into the pair and they can rely on one another for support and for motivation. Third, *make sure that the deadline is reasonable and public.* Allow enough time for phone calls to be made, research to be finished, letters to be written, etc. When the deadline is known to everyone, a degree of urgency will be part of the reason to finish the job. Fourth, *plan a report back to the entire team on progress.* Use a poster session or verbal reports, but make sure that everyone gets a chance to report on her/his results.

Here's the start of an Action Plan that builds on previous examples:

Strategy: Create several events that build on the community's heritage and identity.

Who	What	When
Sandy & Bill	Interview newspaper editor Visit historical society	by Nov 30 by Nov 30
Andrew & Fred	Contact state tourism for ideas	by Dec 5
Rene & Carol	Interview 6 long time residents	by Dec 5

School-community leadership teams can use the following *Action Planning Work Sheet* to organize activities and check off tasks as they are completed.

ACTION PLANNING WORK SHEET

Strategy: ______________________________

Actions or Tasks	Person(s) Responsible	Completion Date Expected	Actual
1.			
2.			
3.			
4.			
5.			

Leadership for Better Schools

Suggested Activities
for
Developing Your Action Plan

- ❖ Goal-Setting with a Group
- ❖ A Town Hall Meeting Sampler
- ❖ Both Sides of the Trend: A Discussion Guide

Goal-Setting With A Group

Goal: To help group members generate information that can be used in setting shared goals and planning program activities.

Time Required: 2-4 hours

Materials: Pencils, 3 x 5 cards, newsprint, tape and markers

Directions

1. Leader introduces the activity by discussing the need for shared goals. Goals can be defined as broad, general statements of the end we want to achieve. These strategies are especially helpful when evaluating work and enable the group to "keep on target" as they work.

2. Leader asks each group member to use a 3" x 5" card and answer the following question:

   What kind of activities would you like to see our group doing five years from now?

   Group members are encouraged to be creative and make a "wish-list." Allow 5-15 minutes for this work.

3. Leaders ask individuals to share their responses in trios and come to agreement on a list that represents their ideals. Newsprint and markers are provided. Allow 10-20 minutes for this work and ask each trio (small group) to display their list.

4. When the lists are displayed, the leader asks someone from each group to report to the large group about their list. Each small group reports briefly. Allow 5-10 minutes for each small group report.

5. Leader then asks group to suggest categories that emerge from the lists. A colored marker can be used to circle similar items on all the lists in order to emphasize the similarity. Allow 15-30 minutes, depending upon the number of lists.

6. Leader then asks the group to suggest a possible goal statement based on the category. A brainstorming session can also be useful at this point.

A Town Hall Meeting Sampler

One of the most effective ways to encourage thinking about and planning for the future within a community is to conduct a community forum or town hall meeting. This sampler includes an outline for forming a steering committee, and for planning, organizing and conducting a town hall meeting. Sample agendas for both steering committee meetings and the town hall meeting itself are included.

Using some tried-and-true methods, this sampler is a summary of reminders that will help to ensure success. Some of the important points include:

1. It is very important to organize a representative group or steering committee that will take on the varied tasks involved in promoting and conducting a successful town hall meeting.
2. Using a task list to make sure you've thought of everything can help to avoid panic at the last minute.
3. People are more likely to stick with task assignments if their roles and duties are very clear.
4. Any ideas your group can develop that will make the meeting comfortable, useful, and well-paced will help to make the town hall event different from do-nothing meetings.

The town hall event described in the sampler is designed to serve as the first work session in a community effort to plan for the future. An initial community work session will result in a solid basis of shared understanding about the future and a good start at analyzing the impacts on the community. It also serves as a first step in organizing a core group of leaders from which to draw for further planning and development activities.

Some Guidelines for Conducting a Town Hall Meeting

The following guidelines are meant to suggest approaches for organizing a town hall meeting. The underlying assumptions of these guidelines are:

1. Each community is unique, so a technique or method for working with a group or promoting a meeting must be adopted by those people who understand the community.
2. Community members respond to the opportunity to reflect on and discuss change and its impact on their lives.
3. Such reflection and discussion is vital to good decision making.

Organizing and Promoting a Town Hall Meeting

Steering Committee

The importance of a steering committee to the success of any community-wide effort cannot be underestimated. Whether the group is called a planning or work group, a task force, or a steering committee, it remains as the source of ideas, action and credibility for the project.

Some questions that should be asked before members are selected might include:

1. What do you want the role of the group to be? Will they be asked to lend their name and credibility to the project or, going beyond sponsorship, will they be asked to perform tasks such as doing mailings, writing press releases, making speeches?
2. Based on the role or task that is required, who is the best person to include in the group?
3. What is the best strategy to use to interest potential members in the group? Is there an individual who is best suited to make particular invitations?
4. How can the make-up of this group best reflect the entire community? Are all aspects of the town represented? When you look at your list of group members, who's not here?

Sample Meeting Agenda

- ❖ Introductions (just to make sure everyone is acquainted).
- ❖ Share agenda (so that everyone knows what to expect in the next hour).
- ❖ Explain the idea of a town hall meeting and provide information on the project or activity.
- ❖ Ask if anyone else should be part of the steering committee (*Who's not here?*)
- ❖ Share a sample plan for the town hall meeting (time, place, purpose, agenda).
- ❖ Share a task list and choose responsibilities (who, what, when).
- ❖ Set a date for the next meeting.

Follow-up

After members of the group have heard ideas and enthusiasm about a town hall meeting, they will most likely agree to help with various tasks.

However, it's vital that someone takes the lead in maintaining continuous contact with the group. It's usually the people who are already very busy who choose to get involved in community projects, so reminder telephone calls, postcards and informal visits can be very helpful in keeping a group on task and meeting their deadlines.

Sample Task List for Organizing a Town Hall Meeting

Facilities: Reserving place and date

Promotion:

- Special invitations to people in recognized leadership positions such as officers of service clubs, church organizations, Chamber of Commerce, elected and appointed officials, ministers.
- Press release or special notice for newspapers, radios and any organizational newsletter that your community members might receive.
- Notices, posters, flyers in well-traveled places in the community.
- Use of "telephone trees" within service clubs and other organizations to invite community members.
- Sending an invitation to families from the school, notice in the school bulletin or a flyer sent home with students.
- Including an invitation with a monthly utility bill.

Conducting the Town Hall Meeting

Actually conducting a town hall meeting isn't difficult if you have an active steering committee or group that will divide the tasks into manageable parts. Several roles are particularly important and should be considered carefully by the group.

Registration Table: Sign in and pick up materials.

Greeters : Host/hostess to greet people at the door, thank them for coming and ask them to sign in at the registration table.

Convener : An individual who will be recognized by most members of the community and who will lend credibility to the meeting, provide the official welcome and introduce the first activity, and close the meeting at the end of the evening.

Activity Leader: An individual who has become familiar with the agenda and can direct participants to form smaller groups, then provide a summary of the activity at the end of the meeting.

Discussion Leaders: Individuals who can help groups of 7-10 community members work through the *Trends Discussion* activity and direct participants to small group sessions.

Sample Agenda

The following agenda is provided as a sample. It is very flexible and can be adapted to special needs in each community.

6:30 p.m. **Registration & Coffee**
Participants get name tag, agenda and sample issues sheet

7:00 **Share Agenda**
Purpose of the meeting

7:10 **Review Sample Issues**
Distribute questions for public deliberation (as determined by the steering committee)

7:15 **Discussion Activity**

1. break into small groups
2. facilitators lead discussion and record ideas: each table creates a list of the top three issues
3. each table reports, a master list is created
4. each participant gets five self-adhesive dots and "votes" for the top issues

8:15 **Break and Refreshments** while participants visit and the votes (dots) are tabulated

8:30 **Report on Ranking of Issues**
Table groups discuss the top issue and consider the town's strengths and weaknesses related to that issue

9:00 **Tables Report Their Comments**

9:30 **Closing and Evaluation**
Participants fill out evaluation sheet:
What did you like about tonight's meeting?

9:45 **Steering committee meets to read evaluation forms and discuss next steps.**

What would you have changed about this meeting?

What specific actions do you see as possible for you or your community?

Meeting/Activity
Sample Evaluation Form

1. What did you like best about this activity?

2. What did you like the least?

3. The most important thing I learned was...

4. The way this activity was designed and conducted made me feel...

5. How would you rate this activity in achieving its goals?

Goal I: ______________________________

1	2	3	4	5
Not At All				Very Successful

Goal II: ______________________________

1	2	3	4	5
Not At All				Very Successful

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Both Sides of the Trend: A Discussion Guide

This exercise is designed to help groups begin to focus on those trends that are most significant to the future of their community and to identify the threats and opportunities represented by those trends.

The basic design of this activity is a structured discussion in which group members decide on a trend that they wish to discuss and then analyze the impacts of that trend in terms of the threats and opportunities it will bring.

For example, an obvious trend that small towns must deal with is the increasing age of their population. This change in the demographic profile of their citizens may be a threat in some ways (having tremendous impacts on housing and health care needs) but in other ways might prove to be an opportunity (in areas of retired volunteers or business opportunities in services to the elderly).

The guide is based on trends identified during a statewide strategic leadership project and outlines this activity step-by-step, from selecting a recorder to keep track of the discussion, to brainstorming guidelines, to samples of group discussion questions.

The guide is in a camera-ready format that can be used to duplicate and then distribute at a meeting or work session. The time required for this activity will vary depending on the amount of time allowed for discussion. However, you should plan on 1 to 1 1/2 hours to complete this discussion activity.

Goals:

1. To structure the discussion of probable trends on the positive and negative impacts of each trend.
2. To help keep the discussion focused on a particular topic.
3. To organize the information and ideas that come from the discussion.

Please read the directions as your group proceeds through the discussion:

1. As a group, select a recorder who will keep track of the discussion on the newsprint provided.
2. As an individual, take a look at the following list of trends and pick one that seems most significant to you.

Trends

- ❖ Likely consolidation of government and business services into larger towns.
- ❖ Continuing debate over moral/ethical issues in health care.
- ❖ New tax sources necessary to maintain quality education at all levels.
- ❖ The number of banks operating in the state will continue to decrease.
- ❖ Great expansion of telecommunications and information available by direct access.
- ❖ Fewer farms, more regulation of all natural resources and expanded products and processing in agriculture.
- ❖ More manufacturing jobs.
- ❖ Increased services to the elderly.

3. In turn, each member should tell the group which trend he or she picked as most significant. (*You might want to record the other group members' choices here.*)

4. As a group, select a trend to discuss in depth.
   The recorder should list this choice on newsprint.

5. Your task now is to create a list of the threats represented by this trend and the opportunities it will bring.

Trend: ______________________________

Threats Opportunities

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6. Now, as a group, create a list that will include all the ideas that each individual has developed. Your recorder should list these ideas on the newsprint provided.

   Make sure that everyone's ideas are included.

   About 20 minutes has been planned for this part of the activity.

7. When your group has finished creating a list of the threats and opportunities that will result from a probable trend, you might want to take some time to discuss some of the ideas.

- ❖ Can any of the threats be minimized?
- ❖ Can any of the opportunities be maximized?
- ❖ How can communities prepare for the threats of the future trend you discussed?
- ❖ How can communities make the most of the opportunities created by this trend.

8. Listen for directions for sharing your work with the total group.

Chapter 6: Monitoring Results

About Learning Teams

Learning teams are part of the school-community group that has accepted the challenge of tracking progress in the process of public engagement in school reform. What the learning team can do is to make sure that the community is learning as much as it can about the progress that is being made, so that lessons from both successes and failures can be captured and saved.

It's important to note that this basic premise is somewhat different than a typical evaluation approach. Rather than waiting to assess success at the end of a project, a learning team approach focuses on continuous feedback. The emphasis is on learning from our experiences, rather than evaluating successes and failures.

Typically, learning teams are comprised of volunteers, although staff members of organizations cooperating in the public engagement process might also be involved. (The learning team role may be assumed directly by the entire school-community leadership team, but it's often wise to name a separate group so that the work is shared. This means that the learning team is, essentially, a subgroup of the leadership team.)

Members of the learning team agree to take on several tasks:

- **Becoming knowledgeable about the public engagement process itself and any intended outcomes that have been articulated by the school-community leadership team, by the learning team or by some process that identifies other hoped-for results.**
- **Participating in establishing means to measure those outcomes using reasonable and realistic processes of measurement that will communicate results easily and simply.**
- **Following through with action as the key people who track down the information necessary to support a conclusion about the project's progress.**
- **Communicating that information to the parties who have a need to know and learn.**

Learning teams should seek to identify ways to measure progress, not just describe it. That is, the information they collect will be most useful if it is *data-oriented*, rather than only observations or opinions. This means that learning team members should accept responsibility to be creative about how progress might be traced, seeking new ways that might go beyond traditional signs of success.

The Continuous Learning Cycle

Learning teams are seen as important players in what might be called a ***cycle of continuous learning***. This is a cycle of review that attempts to expand what is known on a continuous basis so that improvements might be made as the activity or project is proceeding.

Too often, in traditional evaluation activities, progress is not really measured until after the fact. At the point when the project is over, the value of the evaluative information is to guide future projects or to be added to the body of knowledge that might be studied.

The learning team approach is different in that it not only assumes that citizens can act as evaluators but also that the **purpose is to provide feedback to the process while it is ongoing**. In this respect, the learning team approach borrows from the concept of *Continuous Quality Improvement(TQI)* that has enjoyed recent popularity in the corporate world.

The cycle of feedback and improvement can also be called, "Action, Reflection, Action" to underscore the notion that:

- **Action** is taken (the public engagement effort begins).
- An opportunity for **Reflection** is provided (consideration by the learning team and the leadership team).
- Some type of revised **Action** is taken (based on the information collected to guide reflection by the learning team).

The notion is that a process like public engagement for school reform will benefit from a continuous monitoring of progress and learning.

What will the work of the learning team look like? For example, one intended outcome of the public engagement process might be improved relations among the school and various businesses in town. The learning team then develops some indicators of progress or signs of success, and then goes about the work of gathering the relevant information. The indicators of success and the measures can be simple...but watching progress over time will result in an awareness that something has really changed because of the leadership team's work.

In this example, the learning team might assign members to monitor whether more teachers become active in the local Chamber of Commerce (measured in a number collected from the Chamber's staff), or whether a target number of businesses offer rewards for academic or sports achievements (measured again in numbers collected from school staff).

After some time, the learning team might also report progress to the community through a newspaper article or call-in radio program. And, if insufficient progress is made, then some revision to the efforts of the school-community leadership team might be in order.

Learning Team Meetings

Because the learning team can operate as a subcommittee of the school-community leadership team, work sessions within the group can be very different from what members might have experienced while planning or implementing a project in the past.

In the learning team, each member is responsible for attending to both the task assignments and the equal participation of all members in the group. This demands quite a bit of attention from all members and a commitment to use work session time productively, to deal promptly and directly with conflict and to share credit as well as leadership.

One of the easiest ways to accomplish all this is to establish some patterns for learning team work sessions. By using a simple formula of standard agenda topics and questions for discussion, the group can create an atmosphere where the best of work, empowerment and learning can occur.

Of course, this doesn't mean that each work session will be exactly the same. New agenda items will occur, topics will develop and creative approaches will be tried out. Still a basic structure can go a long way towards making the most of time spent in work session.

Some Guidelines For Work Sessions

As with any group working together, every agenda should address the need for members to feel welcome and comfortable. This means that introductions might be necessary if visitors are present, or an update offered to a member who's been absent.

Some groups regularly begin the meeting with some "check in" time to help the group come to focus on working together. Comfort also means time, place and possibly refreshments (always a welcome method to keep things informal).

Most members will also want to know what to expect during the work session regarding topics, discussion, actions and the ending time. Getting the agenda out ahead of time will help these members anticipate the meeting and increase their comfort level.

Another item that should be on every agenda is a review of the time lines, deadlines, due dates, and so on. This builds into the learning team work session a sense of accountability for assignments. In fact, some learning teams will simply post a time line on newsprint sheets and refer to it at the beginning of each work session.

Discussion Questions for Learning Teams

Some discussion questions can be standard and used over and over again at a different stages of the public engagement process. For example, asking...

Is this the best way to accomplish this task?

will create a discussion on improvement and provide for continuous learning.

And asking...

What would we do differently if we had to repeat this task?

is a way to collect experiences and learn from them.

Who else should be involved?

is a question that will inform a discussion of representation.

What skills do we need?

will result in a description of the type of volunteers to be recruited.

Regarding the identification or impacts or results, the group can use a series of questions to review the outcomes established for public engagement, check on the usefulness of the indicators or signs and of success that have been set and review their progress in gathering information for measuring change.

Certainly asking, "Is this really what we want to know?" about a set of outcomes, indicators and measures can be very productive in making sure that the information to be gathered is practical and will, in fact, show that the process resulted in some changes over time.

Lastly, the learning team might want to discuss how to keep the public engagement process visible to the community and ask, "Who needs to know about this?" and "What should we tell them?"

A good summary question for team reflection is, "What are we learning about ourselves and our community?"

Many other useful questions can be created by the team in a brainstorming session during any of the team's meetings.

Learning Teams as Participatory Evaluation

Learning teams focused on monitoring progress of public engagement in school reform represent the application of an evaluation technique called participatory evaluation. The use of participatory evaluation is an increasing trend in both international and U.S. community development.

While the use of an outside or external evaluator represents a traditional and often useful approach to evaluation, many community projects are now guided by an internal, on-site evaluation led by participants themselves

This type of evaluation by participants has many advantages. It offers community residents an opportunity to learn and practice new skills, thereby increasing the capacity of the community to manage similar projects in the future.

Participatory evaluation also represents a strategy to empower local people to guide and alter a project based on information that they themselves gather. This is a type of evaluation that **forms** the local effort as it evolves rather than an evaluation that sums up the effort after it is finished.

In participatory evaluation, control of the process resides locally, as does the responsibility to act on information that indicates a need to adjust or revise a project plan.

Many resources are available concerning participatory evaluation and learning teams. One excellent resource is the Community Partnership Center at the University of Tennessee-Knoxville (423-974-9030). A search of the Kellogg Collection of Rural Development Resources (www.unl.edu/kellogg/index.html) will offer other materials on learning teams and participatory evaluation.

Suggested Activities for Monitoring Results

- A Sample Work Session Agenda
- Questions for Self-Assessment
- Rotating the Conveners of Meetings

Sample Work Session Agenda

A typical learning team work session agenda might look like this.

HOMETOWN Learning Team

January 15, 1999

Convener Diane Green

Start Time Greetings & Personal Updates

Review of Assignments

Report on Citizen Task Force

- attendance
  (number in each)
- representation
  (geographic, age, gender and ethnicity)

Report on Town Hall Follow-up

- Newspaper coverage
  (number of stories)
- Letters to the editors
  (number of submissions)
- Student newspaper
  (number of students working on stories)

Discussion: Speakers Bureau w/Service Clubs

"Is this the BEST way to organize this effort?"

Date for next work session, selecting a discussion leader

End Time Adjourn

Questions for Self-Assessment

With members of your learning team or any work group or task force, ask each member first to answer the following five questions on their own. Then ask each person, in turn, to share answers to Questions No. 1. Pause for group discussion before moving on to Question No. 2. Share answers to each in order until all questions have been discussed.

1. ***What are you learning about yourselves and your communities?***

2. ***What successes are you having?***

3. ***What changes are you making?***

4. ***In what ways might you apply what you are learning in other contexts?***

5. ***What other questions should you be asking yourselves?***

Rotating the Conveners of Meetings

For a learning team, the technique of rotating the duty of convening each meeting can offer a great, informal way to insure involvement, share responsibility and build in the unique perspective of each member. Simply put, this means that each member takes a turn as the leader for a given work session or meeting.

As with most group process techniques, this is not a complicated maneuver; but it does require the agreement of all to share the duty and a systematic method to actually use the technique on a regular basis.

Here are some suggestions on how to put the idea into action:

1. As a group, discuss the technique and the use of the word *convener*. It's helpful to list the duties of a convener (as opposed to, say, a discussion leader, or club president). These duties might include greeting members, beginning the meeting, making sure the agenda is covered, watching the time and making sure all voices are heard. Your group may add additional duties.
2. Establish a pattern that the next meeting's agenda is built in as the last item of the current meeting. In this way, the next convener has a plan and can spend some time preparing and thinking ahead about the next meeting.
3. Arrange a 30-minute "prep time" for the next two conveners to get together and plan the upcoming meeting. In this way, the future is planned and both upcoming conveners have some support from one another.
4. As a group, agree to offer some feedback to each and every convener after the meeting. This can be an informal remark (*The way you encouraged everyone to speak was helpful*), a written note before leaving, or whatever makes the group comfortable. What's important about this is the feedback to the individual and establishing the pattern of encouraging, offering suggestions for improvement and interaction that are the hallmarks of a learning team.

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