

Tools for LEARNING SCHOOLS

LEARNING FORWARD'S VISION: EXCELLENT TEACHING AND LEARNING EVERY DAY

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PULL TOGETHER

Engage all stakeholders for project success

By Nick Morgan

Kara and her team had a new vision for how professional learning could make a real difference in their 48,000-student district. Through months of discussion, research, data analysis, and pilot studies, the team — all members of the district's professional development department — identified a plan to overhaul how it supported teachers in

implementing new strategies and lessons aligned to the district's instructional frameworks. The plan would reshape district-led

Learn more about how Learning Forward's Redesign PD Community of Practice helps participating districts improve their professional learning systems on p. 3.

professional learning, school-based PLCs, and the use of coaches across several schools. It would also help the team address its overarching concern of achieving coherence in the district's professional learning system by breaking down silos and aligning more resources toward the district's strategic priorities.



The team thought it was taking a practical approach by dividing its work into manageable steps. It launched its first pilot in a middle school that had been struggling with its literacy targets. The team consulted the assistant superintendent of human capital, who had attended early team discussions about the initiative and seemed to be on board with the team's goals. The team had also formed strong bonds and gathered input with the teachers in the school where it launched its pilot studies.

Then it all unraveled. At the first district leadership retreat of the school year, the team presented what it believed to be a research-aligned, cost-efficient game plan for supporting teachers at every level. The first comments were positive. The approach made sense, teachers would appreciate the new opportunities, the old model was ready for retirement, and so on. Yet within the hour, the team's plan was shelved, and the district leadership team committed to carry on, essentially unmodified, its previous approach to professional development districtwide.

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HOW DID THE MEETING UNFOLD?

- Many of the principals in the room resented a perceived takeover of their building's PLCs and worried about how resources might be reallocated.
- Two district department heads questioned how this work could really get done without undermining other district priorities. Who would carry it out, who would pay for it, what wouldn't get done?
- The superintendent charged with technology management presented a competing plan to leverage the district's learning management system.
- The assistant superintendent of human capital raised questions she hadn't asked months ago.

In the midst of so many difficult questions, the group agreed that the plan wasn't ready for the district. It couldn't see a path forward, so it agreed to consider a modified plan in six months.

WHAT HAPPENED?

The more relevant question is, "What didn't happen?" Despite their best intentions, and some scattered efforts to connect to others about their work, Kara and her team left out a critical component of launching a new initiative — engaging stakeholders.

Stakeholder management is the intentional engagement of any one who will be affected by or responsible for any element of an initiative. Stakeholders could be close to or far from the origination of a given project, and they could serve at any level of a school or organization. Engaging stakeholders deliberately is a critical element of a comprehensive performance management process — see the list of components at right.

At the outset of any new project or initiative, it is essential to clearly delineate who should be doing what and when. The start of a project is also the ideal time to clarify who has the authority to make key decisions and lay out scenarios for dealing with unforeseen complications. Outlining the roles and responsibilities of everyone involved clearly sets expectations and also provides a necessary structure for efficient and effective communications going forward.

Teams have greater success when they establish this structure in conjunction with a solid project plan early on and revisit it as necessary as the plan unfolds. This management structure could be introduced at any time, though as Kara's team realized, it would have been much easier to tackle these questions earlier.

Learning Forward BELIEF

More students achieve when educators assume collective responsibility for student learning.

The stakeholder management templates included here are intended to serve as a starting point for planning in one key area of performance management. Learning Forward will continue to release tools that support other critical areas of performance management over time.

The tools offered here support the major stakeholder discussion points to build a solid structure from the start. Broadly, key steps are:

1. Agree on which stakeholders are necessary to make a project or initiative a success.
2. Determine as a team what level of involvement and authority these stakeholders should have.
3. Allocate clear stakeholder roles and responsibilities as early as possible for each key activity in a project plan.

PERFORMANCE MANAGEMENT PROCESSES

Key components of a broad performance management process include:

- **Establishing a vision:** Establishes a common view of what success looks like for a discrete time frame.
- **Key goals and current state assessment:** Helps lay out the overarching goals that define how to achieve that vision.
- **Major milestones and backward mapping:** Breaks down the initiative's timeline into major steps and outcomes that demonstrate progress over time.
- **Short-term activity planning:** Outlines detailed activity planning for one milestone at a time, and focuses teams on the coming few months.
- **Stakeholder management:** Begins with stakeholder brainstorming, and allocates roles and responsibilities. This component is typically used in conjunction with a detailed activity plan.

Tools for each component of the overall process complement the others. Teams can use each tool or template sequentially as they work through the launch of a new effort or they can turn to individual components to strengthen or reaffirm an ongoing initiative. When taken together and used to manage workflow, these tools can be a powerful approach to drive progress and change.

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About the Redesign PD Community of Practice

Learning Forward's Redesign PD Community of Practice is a national collaboration of 22 leading school districts committed to creating solutions to problems of practice to advance the effectiveness of professional learning. The community uses a series of performance management tools to facilitate its collaborative work, including those included in this issue of *Tools for Learning Schools*.

The Redesign PD Community of Practice provides focus, guidance, expertise, and shared accountability to the participating districts to make dramatic improvement to their professional development systems. With a focus on effective implementation, the community responds directly to the needs of the field.

The participating systems collectively enroll more than 2 million students, 5% of the public school students in the country, and the community offers a strong path to improving professional learning at a national scale. Further, the community of practice will capture and publish learning to share with the broader field, including to Learning Forward's more than 50,000 members and stakeholders.

At the heart of the community's work are a series of continuous improvement cycles for improving the effectiveness of professional learning and the elements that support it. Over the 18-month duration of the Redesign PD Community, each district will work through multiple cycles, allowing for rapid learning and improvement to pursue the

district's overarching goals with greater efficacy. The collaboration and mutual accountability within the community reinforces the cycle and provides valuable opportunity for further learning.

Cracking key challenges on two major problems of practice will demonstrate major progress toward building effective, consistent professional learning. The problems are: how to strengthen the measurement of the impact of professional learning on teacher practice and decision making based on these measures; and how to increase the coherence and relevance of professional learning so that teachers experience it as useful, timely, and relevant to their classroom practice.

Community facilitators guide participants through discussions with their teams to create clear visions of what success would look like, detailed plans to achieve these visions that included specific goals and milestones, and stakeholder management plans to help ensure the rollout is successful. The tools used in the community address a variety of performance management challenges, including the stakeholder management tools included here. These can be used to help guide proactive stakeholder management in any project or initiative a team undertakes, no matter its scope.

Use #RedesignPD to follow and engage in ongoing learning about the evolution of this work. The Bill & Melinda Gates Foundation provides support to Learning Forward to lead this project.

ASSIGN RESPONSIBILITIES TO KEY STAKEHOLDERS

A popular project management approach for assigning roles and responsibilities to stakeholder groups is a responsibility assignment matrix. This is often referred to by a common acronym such as the RASCI model, which stands for Responsible, Accountable, Supportive, Consulted, or Informed — often the model is just RACI. There are other models. For example, one of the Redesign PD Community member districts, Tulsa Public Schools, uses the MOCHA acronym, which stands for Manager, Owner, Consulted, Helper, Approver to help assign clear roles and responsibilities in managing key initiatives.

While the origins of responsibility assignment matrices are unclear, they date back at least to the early 1970s as new project management protocols were gaining in popularity. Such models are easy to use, and have a range of benefits for change management in education. First, they help keep everyone on the same page, easily identifying who is responsible for a particular task. Importantly, they help assign clear decision rights — who gets to make what decision, and who plays which role in getting to those decisions. They also help keep the necessary people in the loop and reduce miscommunications, while saving time overall. And, at a higher level, they can help identify staff with either too many or too few responsibilities when multiple projects are considered together.

See an example of this matrix on p. 5.

Brainstorm key stakeholders

To begin the broader set of exercises associated with stakeholder management, it's important to define who exactly these stakeholders are. Since team members may have very different perspectives, it's a great idea to discuss this as a team.

Using the template below, list the key stakeholders to engage to realize the stated vision for a given project or initiative in a discrete time frame (a year is a good length to start). Do not forget to engage across multiple organizational levels and think beyond the org chart — consider also informal influencers. Also consider outside organizations, if relevant. A tip: Whenever possible, it's best to list individual names, as opposed to generic groups of people.

This exercise also requires teams to designate an appropriate level of necessary engagement. In the next step, teams will refine this by assigning more specific roles to key activities in the plan. Please consider the following four levels of engagement, from low to high, and assign a value to each stakeholder or group listed along with notes about why a given stakeholder needs to be engaged at that level.

- **Level 1:** Need to be aware.
- **Level 2:** Need to understand and communicate to others.
- **Level 3:** Need to have input on approach.
- **Level 4:** Essential role in delivering solution.

Who? (Specific person or group of people)	Level of engagement (1-4)	Why do they need to be engaged at this level?

Assign responsibilities to key stakeholders

In the template below, assign a letter, from R to I, to each stakeholder for each task that is part of the project plan. As the example shows, not every activity needs to have a letter assigned for each stakeholder. For instance, in Activity 2, there is no need to involve the chief academic officer (CAO) or the director. However, it is very important that for each activity, there is only one R and one A — multiple people can't hold ultimate responsibility or accountability.

SAMPLE RASCI CHART

Activity	CAO	Director	Manager	Coordinator	Assistant
1	A	R	C	C	I
2			A	I	R
3	I	A	R	C	S
4		I	RA		

KEY TO RASCI CHART

R	Responsible	Owns the problem or project.
A	Accountable	To whom "R" is accountable; who must sign off (approve) on work before it is effective.
S	Supportive	Can provide resources or can play a supporting role in implementation.
C	Consulted	Has information and/or capability necessary to complete the work. Their opinions are sought: Two-way communication is needed.
I	Informed	Must be notified of results or progress, but need not be consulted. One-way communication is needed.

NOTES

- Use RASCI to manage meetings and communications.
- One "R" per activity only.
- Manage gaps and overlaps.

Map stakeholders to an activity plan

For the activity plan, begin by using a calendar template to lay out specific tasks necessary to reach a given milestone.

After laying out the plan for the next several months on a calendar, number and name the tasks, identify the deadline and/or time frame for each task, and note the name and role of who is responsible, accountable, consulted, supporting, and informed.

The template below provides one grid each for tasks associated with each goal. If the team is not starting work on a given task or goal until later in the year, leave the associated grids blank.

ACTIVITIES FOR GOAL 1: _____

No.	Task description	By when or over what time frame?	Responsible	Accountable	Supportive/ Consulted	Informed
1						
2						
3						
4						
5						

ACTIVITIES FOR GOAL 2: _____

No.	Task description	By when or over what time frame?	Responsible	Accountable	Supportive/ Consulted	Informed
1						
2						
3						
4						
5						

Activity plan example

As part of their overall planning, team members outline detailed tasks or activities necessary to achieve higher-level goals. In this part of the process, they identify stakeholders to inform aligned to the particular tasks or activities under a specific goal.

ACTIVITIES FOR GOAL 3:

Teacher planning practices will be carried out in a way that is coherent and relevant to district initiatives.

No.	Task	By when or over what time frame?	Responsible	Accountable	Supportive / Consulted	Informed
1	Administration and central office staff to meet with teacher focus groups to review and discuss survey.	Jan. 18-29, 2016	Director of professional learning	Chief academic officer	Curriculum supervisors Principals/ assistant principals	Teachers Superintendent
2	Administration focus group final look to take into consideration all feedback on survey design.	Feb. 11, 2016	Chief academic officer		Superintendent Director of professional learning Curriculum supervisors Instructional coaches	Principals
3	Central office staff meet to discuss expectation for lesson plans to align to district initiatives.	March 1, 2016	Chief academic officer		Superintendent Curriculum supervisors Coaches Instructional coaches	Principals
4	Principals provide feedback on what central office staff developed as lesson plan expectations	March 10, 2016	Chief academic officer		Director of professional learning Curriculum supervisors Instructional coaches	Principals
5	Principals review revised lesson plan expectations and build consensus to move forward with the process	April 14, 2016	Director of professional learning	Chief academic officer	Superintendent Curriculum supervisors Instructional coaches	Principals

Adapted from the work of the Loudon County (Tennessee) Public Schools team.

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