

13th Annual

# Thinking & Learning Conference

**BRUCE WELLMAN**

Sunday 22 May  
One-Day Institute

**Groups at Work Institute**

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**MELBOURNE**

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# BRUCE WELLMAN

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# Leading Groups

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Effective Strategies  
for Building Professional Community

by

Laura Lipton and Bruce Wellman



# Premises & Practices for Leading Groups

## Prem-ise (n):

a proposition that forms the basis of an argument or from which a conclusion is drawn.

## Prac-tice (n):

the process of translating an idea, plan or theory into action.

### **Premise 1. Groups develop and their development can be positively influenced**

A group is not a static thing; it is a living system with the potential for growth and positive change. When we think of and talk about a “group”, “team” or “department” as if it were an inanimate object, the many ways that the members are interacting and relating to one another and to their tasks is absent from our mental model.

By envisioning our groups as they might be --- not as they are presently performing, purposefully structured work sessions can both accomplish tasks and at the same time develop stronger, more effective working relations among the group members. By planning for cumulative effects while working consciously in-the-moment we can design for and create improvements in knowledge, skills and dispositions. Leaders who produce these gains operate with multiyear timelines for group development. Given the immediacy of life in schools, the ability to expand time horizons becomes a critical attribute for successful group developers (Jaques & Cason, 1994).

Group members are not always conscious of the effects of their behaviors on others. One important aspect of group development is to illuminate both the choices that individuals are making and the influences and results of these actions. Helping group members to realize that they are making choices and that they have available options develops the capacity to monitor and adjust behaviors, increasing the productivity of the group and the satisfactions of successful collaborative engagement.

Developing skillful groups requires thoughtful attention to the group’s purposes, processes and products. Establishing clear performance and product standards guides the design, delivery and assessment of both task and relational outcomes. When group members help develop these success criteria rather than having them imposed by others, they then own these standards and the related performance indicators become active guides for effective interactions and productive outcomes.

As group leaders, we also need clear goals and regularly applied assessment tools to guide our own growth. Taking time to reflect on both successes and stretch areas helps us to isolate the many skills that contribute to group success and group development and set both short and long terms goals. By searching for the relationship between our personal learning goals and learning goals for the group, we come to see the catalytic effects of the decisions and choices that we are making before, during and after leading group work.

**Practice:** The group leader’s mindset matters. Skillful leaders believe in the group’s potential and take responsibility for developing the group and protect time to plan and reflect.

**Premise 2: Human behavior has a biological and sociological legacy**

As group members and group leaders we enter a meeting room embodying all the complexities of our biological and sociological inheritances. These genetically and socially wired filters shape our perceptions, internal processes and external actions.

Social, emotional and mental responses have roots in a primate past. Our biological history equips us with finely tuned threat detection systems for reading and responding to the signals of others. Thus, cognitively complex work requires psychologically safe environments. Creating such environments is a prime responsibility and ongoing challenge for group leaders.

Human brain development was spurred by life in complex social networks. Each group member has a relationship with every other group member and a need to monitor each group member's relationship with everyone else. With an increase in group size comes greater social demands, greater energy expenditure for participation and a greater need for structure, protocols and leadership.

Traditional patterns of school organization limit opportunities for group development. Scheduling constraints, lack of meeting space, and the absence of shared product and performance standards for student work curtail possibilities for collaborative engagement and growth. Time to meet by itself is not a sufficient resource to influence changes in practice. Groups need structure and guidance to talk about hard to talk about topics.

Enculturated social boundaries shape all collaborative interactions, often resulting in closed classroom doors, reticence to publicly question a colleague's instructional practices and low relational trust. These legacies are part of what make changes in organizational patterns and practices so difficult. Data that might influence changes in instructional practices "bounce off" cultures with strong norms of privatism and high degrees of teacher autonomy. When the teaching space is seen as personal property, there is resistance to group processes that attempt to open up these private arenas to public scrutiny, collective analysis and collaborative decision-making. Ultimately, group leadership is cultural leadership when we draw our groups' attention to dysfunctional patterns and offer tools and approaches for establishing more productive ways of interacting.

**Practice:** Groups requires attention to pattern breaking, pattern making and pattern taking. Skillful leaders identify non-productive patterns and structure interactions to produce behavioral change.

*What are some connections to your work related to premise 1 & 2?*

**Premise 3: There are predictable dynamics in groups.**

While no group is exactly the same as another, or even as itself from one meeting to the next, there are patterns we can anticipate, that inform meeting design and that influence interaction. Understanding these dynamics provides key information to group leaders.

Our preferences are sources of judgment; consciously or unconsciously, we tend to be drawn to those who think like us. These operating preferences produce discomfort or comfort for both group members and group leaders. Four tensions are classic in all groups:

*Task – Relationship:* Group members' work style preferences range from a strong focus on task completion to a strong desire for inclusion and collegiality. Conflicting values for attention to task and patience with process cause friction, limit productivity and reduce the group's ability to function as a group. We struggle with this dichotomy, particularly when time is tight. Yet, without a unified voice and shared decisions, school improvement processes bog down in implementation.

*Certainty – Ambiguity:* Individual group members vary dramatically in their need for surety before moving forward with plans of action. For some, a lack of clear and precise definitions, rules and steps in a process halts progress. However, in both planning and implementation, comfort with some degree of ambiguity is essential for initiatives to move forward. When this tension is polarized, groups get stuck and lose momentum.

*Detail – Big Picture:* A focus on the specifics of projects and plans is a source of comfort for some group members, while for others a wider and longer-term view energizes their work. While the big picture preference can cause impatience with the need for specifics, it is these specifics that are the stepping-stones in a final plan. Those who prefer details can feel lost in navigating the big picture, yet a vision of larger view is necessary to inspire movement and to launch direction.

*Autonomy – Collaboration:* Traditionally, schools are structured for autonomy. Schedules, reward systems and even the physical plant curtail opportunities for shared professional exchange. We have a limited history and limited skills with collaborative examination of teaching and learning practices. Individual practitioners who are territorial about their curriculum and instructional practices and other areas of expertise may have difficulty aligning their thinking to engage in shared decisions and in aligning their work to produce the gains of cumulative effect.

**Practice:** Predictable tensions arise for group members and group leaders. Skillful leaders acknowledge these tensions and seek balance for the group and for themselves.

***What are some specific examples of these dynamics in your working groups?***

**Premise 4: Work sessions should be learning sessions**

Learning is not optional in a changing world. The processes of adult work should embed fundamental principles of effective learning, including inquiry-based exchanges, collaborative exploration of text and other information sources, scaffolds for building knowledge, pacing for balanced participation and work style preferences, written and oral responses and periodic reflection and self-assessment.

Focusing on productivity so more work can “get done” often comes at the expense of developing our groups’ production capacities to engage skillfully with more complex challenges. It is shortsighted not to purposely develop our groups’ process skills and relational skills. Groups can achieve both goals when adults come together by efficiently addressing the task at hand, and simultaneously enhancing collaborative skills. Learning how to learn from the work and from each other enhances our group’s task success and capacities for tackling future projects with skill and grace.

However, adult learning is also unlearning. Before an individual can embrace new ways of operating, unlearning, at a variety of levels, is necessary. Forms of unlearning include recognizing the difference between habit and choice and deconstructing unquestioned routines to determine if they are still effective. In group work, unlearning includes examining ways we speak and listen to each other to discern unproductive patterns that might be replaced with more effective ways of communicating.

Opportunities for coming together should not be used for dispensing information, but for processing information and developing shared meaning. Learning is furthered and facilitated by focusing on specific and complex cognitive processes, such as prediction, comparison and cause-effect reasoning. These actions in a collaborative setting deepen understanding, influence beliefs, produce new ways of thinking about teaching and learning and ultimately alter and enhance professional practice.

When work sessions are also learning sessions, groups become knowledge-building communities. Collaborative groups create shared knowledge about teaching and learning based on their individual and collective experiences, they communicate new understandings and develop shared meaning. We also learn about ourselves, our colleagues, our group, and what it means to be an effective group and group member.

When we shape the conversations and the environment in work sessions to promote individual and collaborative learning we reinforce the value that developing as a professional requires a commitment to learning with and from other adults, as much as it requires completion of a task. In fact, processing information and experience is the heart of learning. Our work with our colleagues IS our work – not what keeps us from our work.

**Practice:** Meetings are to meet. Skillful leaders should see and design each meeting as an opportunity to support adult learning.

**Premise 5: Investing energy in design saves energy in delivery.**

Effective design is the foundation of any work session. Just as skillful teachers anticipate outcomes, determine indicators of success and build in contingencies should something unexpected occur, so too do skillful leaders plan adult work with a developmental mindset. However, process is only effective when it is intended to serve the group's purpose. Powerful design is based on having clarity of purpose, incorporating clear task and relationship outcomes. These fundamental design elements focus planning and implementation to produce skillful groups and group members.

To be more skillful leaders, we need an explicit theory of learning that incorporates an understanding of adult group dynamics. These complementary frameworks then inform the choice of structures and strategies in our process designs. Effective process designs engage energy, balance participation and increase group member satisfaction.

Thoughtful process design also provides scaffolds for productive group work. As group members build collaborative skills, these structures offer guidelines for task completion while reinforcing productive group member behaviors. Purposeful design can reduce or eliminate much of the non-productive behavior that emerges in meetings.

Three key elements inform design decisions: structures, strategies and stances.

**Structures:** Structuring group work includes three key dimensions: group size and composition, length of time and degree of structure.

**Strategies:** Skillful designers of group work purposefully choose protocols and activities to achieve outcomes for both tasks and relationships. Effective protocols guide interaction, focus thinking and provide guidelines that keep group members psychologically safe. Through consistent use, they also build the relational skills necessary for engaging in increasingly complex collaborative work.

**Stances:** Skilled group leaders consciously select the most appropriate stance for engaging their groups. These stances include: presenting, collaborating and facilitating. The leader's intention for the session, relationship to the group, the nature of the task or topic and the intricacies of specific strategies are all critical factors to consider when choosing a stance.

**Practice:** Group leaders plan for cumulative effect. Skillful leaders design and apply process strategies, structures and stances to increase task focus and develop collaborative relationships.

*What are some applications for your work related to premises 4 & 5?*

**Premise 6: Shaping the discourse determines direction.**

Productive conversations emerge from purposeful choices about what to talk about, what not to talk about and the ways in which the group will engage around its selected topics. Lack of structure opens the door for the distractions of telling the latest “war stories” and fills time with social banter that is, at best, unconscious meandering and at worst, a disguised form of task avoidance.

Professional talk can be organized for a variety of purposes. For example, our intention might be to report, to argue, to describe, to engage in dialogue, to persuade, to advocate or to discuss. Skillful engagement and participation is driven by how we attend to others and to our own internal responses. Conscious awareness of our perceptions, judgments, connections, and curiosities allows us to question the appropriateness of our responses and act accordingly. Well-crafted discourse patterns remove the fear of judgment from interactions. All types of discourse improve when they are carefully structured and the group applies text-based protocols and graphic tools to surface and organize information and concepts, and takes time to reflect on both process and outcomes.

Skillful leaders establish a frame for specific discourse patterns and purposes. Clarifying our stance as the group leader is an important part of establishing this frame. It is here that we name the intentions for our roles in the meeting and what interaction patterns the group can expect. By naming these expectations with clarity, confidence and credibility we establish a psychological contract with the group that gives permission to place topics before them and gives permission to structure the discourse processes for engagement with these topics (Grinder, 1997).

**Practice:** Group leaders frame the conversation. Skillful leaders focus group members’ consciousness on the choices that they are making about what they are talking about and how they are talking.

**Premise 7: You can't lead where you won't go.**

If we want group members who are willing to think out loud, embrace new skills, exhibit new behaviors and experiment with new ideas --- that is, actively learn in public --- then we need to be the lead learners in these endeavors. What and how we model as a group leader matters. Leading by example requires vulnerability, humility and a willingness to make mistakes in front of others. Making our problem solving processes and choice points transparent by thinking out loud models self-directed learning. To learn and to help others learn, we have to reveal what we know and don't know about a problem, proposal or process.

Learning-focused leaders cannot be too explicit. Thoughtful preparation for work sessions includes clarifying personal learning goals and designing efficient feedback methods for assessing our growth in the selected arenas. Leading by example means sharing our personal learning goals and requesting feedback on the skills and processes on which we are working.

When leaders model and apply effective communication tools, they establish a standard that becomes the norm for communities of learning. These communities share patterns of discourse that create productive collaborations.

By admitting mistakes and recovering from them, we increase both trust and credibility with group members. In fact, skillful recovery often develops stronger bonds between group leaders and group members than do more seamless group leadership processes. Our willingness to re-examine and modify structures, processes and protocols based on group member feedback amplifies the collaborative energies of the group and reduces dependency on us to be the master of all moments and the solver of all problems. When we step back to reframe purposes and tasks and to clarify outcomes, we develop shared ownership of the group's work and the group's development.

**Practice:** Leaders need to see themselves as learners and be willing to learn in public. Skillful leaders articulate their personal learning goals and seek feedback from their groups.

*What are some implications of premises 6 & 7 for your work as a leader?*

## Predictable Dynamics in Groups

**W**HILE NO group is exactly the same as another, or even as itself from one meeting to the next, there are patterns we can anticipate, that inform meeting design and that influence interaction. These patterns, or tensions, are primary causes for individual and collective comfort and discomfort related to completing tasks, making decisions, and engaging in conflict. Understanding these dynamics provides key information to group leaders. Though patterns vary, some useful generalizations can help in diagnosing, planning for and supporting group development.

Our preferences are sources of judgment; consciously or unconsciously, we tend to be drawn to those who think like us. Four tensions are classic in all groups: the tensions between those who focus on task and those who have a high value for relationship; the tensions between varying needs for certainty at any point in a group process and those more at ease with ambiguity; the tensions between working style preferences, including the need to have rich detail, contrasted with the ability to operate with a wide and long term view; and the tensions for individuals who operate with high degrees of autonomy when they are working in settings that require collaboration. These operating preferences produce discomfort or comfort for both group members and group leaders.

The following descriptions highlight the archetypical ends of a continuum of preference and comfort level. No value is placed on any position on these scales; understanding and anticipating the differences for group members provides key information for group leaders.

**Task – Relationship:** Group members' work style preferences range from a strong focus on task completion to a strong desire for inclusion and collegiality. The pressure to balance efficiency with the need to include all voices produces tension in groups. Conflicting values for attention to task and patience with process cause friction, limit productivity and reduce the group's ability to function as a group. We struggle with this dichotomy, particularly when time is tight. Yet, without a unified voice and shared decisions, school improvement processes bog down in implementation.

**Certainty – Ambiguity:** Individual group members vary dramatically in their need for surety before moving forward with plans of action. For some, a lack of clear and precise definitions, rules and steps in a process halts progress. However, in both planning and implementation, comfort with some degree of ambiguity is essential for initiatives to move forward. When this tension is polarized, groups get stuck and lose momentum.

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**Detail – Big Picture:** A focus on the specifics of projects and plans is a source of comfort for some group members, while for others a wider and longer-term view energizes their work. Wide ranges exist in this dimension of work style preference. While each of these perspectives adds value to group work, tensions emerge when working styles conflict. While the big picture preference can cause impatience with the need for specifics, it is these specifics that are the stepping-stones in a final plan. Those who prefer details can feel lost in navigating the big picture, yet a vision of larger view is necessary to inspire movement and to launch direction.

**Autonomy – Collaboration:** Traditionally, schools are structured for autonomy. Schedules, reward systems and even the physical plant curtail opportunities for shared professional exchange. We have a limited history and limited skills with collaborative examination of teaching and learning practices. The desire for and habits of individualism reduces the potential for collaboration. Individual practitioners who are territorial about their curriculum and instructional practices and other areas of expertise may have difficulty aligning their thinking to engage in shared decisions and in aligning their work to produce the gains of cumulative effect.

## Self-Assessment as a Group Member: Four Dynamical Tensions

Under stress, we tend to revert to our underlying preferences. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that we might experience during group work. Imagine yourself in such a setting as you work in a group of which you are a member. Place a check mark on your likely default positions in such a situation.

<b>Task</b>	_____		_____		_____		_____		_____	<b>Relationship</b>
<b>Certainty</b>	_____		_____		_____		_____		_____	<b>Ambiguity</b>
<b>Detail</b>	_____		_____		_____		_____		_____	<b>Big Picture</b>
<b>Autonomy</b>	_____		_____		_____		_____		_____	<b>Collaboration</b>

The learning journey is always a quest for increasing flexibility to produce more options for ourselves and our groups. Reflect on the following questions and record your thoughts below.

*What are some patterns of discomfort to monitor in yourself as a group member?*

*What are some hot button topics coming up in your group(s) that will require personal flexibility for you to be a more influential group member?*

## Self-Assessment as a Group Leader: Four Dynamical Tensions

How we behave as a group leader is not always the same as how we behave as a group member. Under stress, we tend to revert to our underlying preferences. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that we might experience during group work. Imagine yourself in such a setting as you work with a group of which you are the leader. Place a check mark on your likely default positions in such a situation.

<b>Task</b>	_____		_____		_____		_____		_____	<b>Relationship</b>
<b>Certainty</b>	_____		_____		_____		_____		_____	<b>Ambiguity</b>
<b>Detail</b>	_____		_____		_____		_____		_____	<b>Big Picture</b>
<b>Autonomy</b>	_____		_____		_____		_____		_____	<b>Collaboration</b>

The learning journey is always a quest for increasing flexibility to produce more options for ourselves and our groups. Reflect on the following questions and record your thoughts below.

*What are some patterns of discomfort to monitor in yourself as a group leader?*

*What are some hot button topics coming up in groups you lead that will require personal flexibility for you as a leader?*

## Assessing Your Group: Four Dynamical Tensions

Under stress, group members tend to revert to their underlying preferences. Groups ultimately develop working styles based on the personalities of individual members melding into a social contract that defines tacit agreements about how the group should operate, especially under duress. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that groups might be experiencing. Think about a group you are presently leading; consider how this group typically reacts under stress. Place a check mark on the likely default positions in these situations.

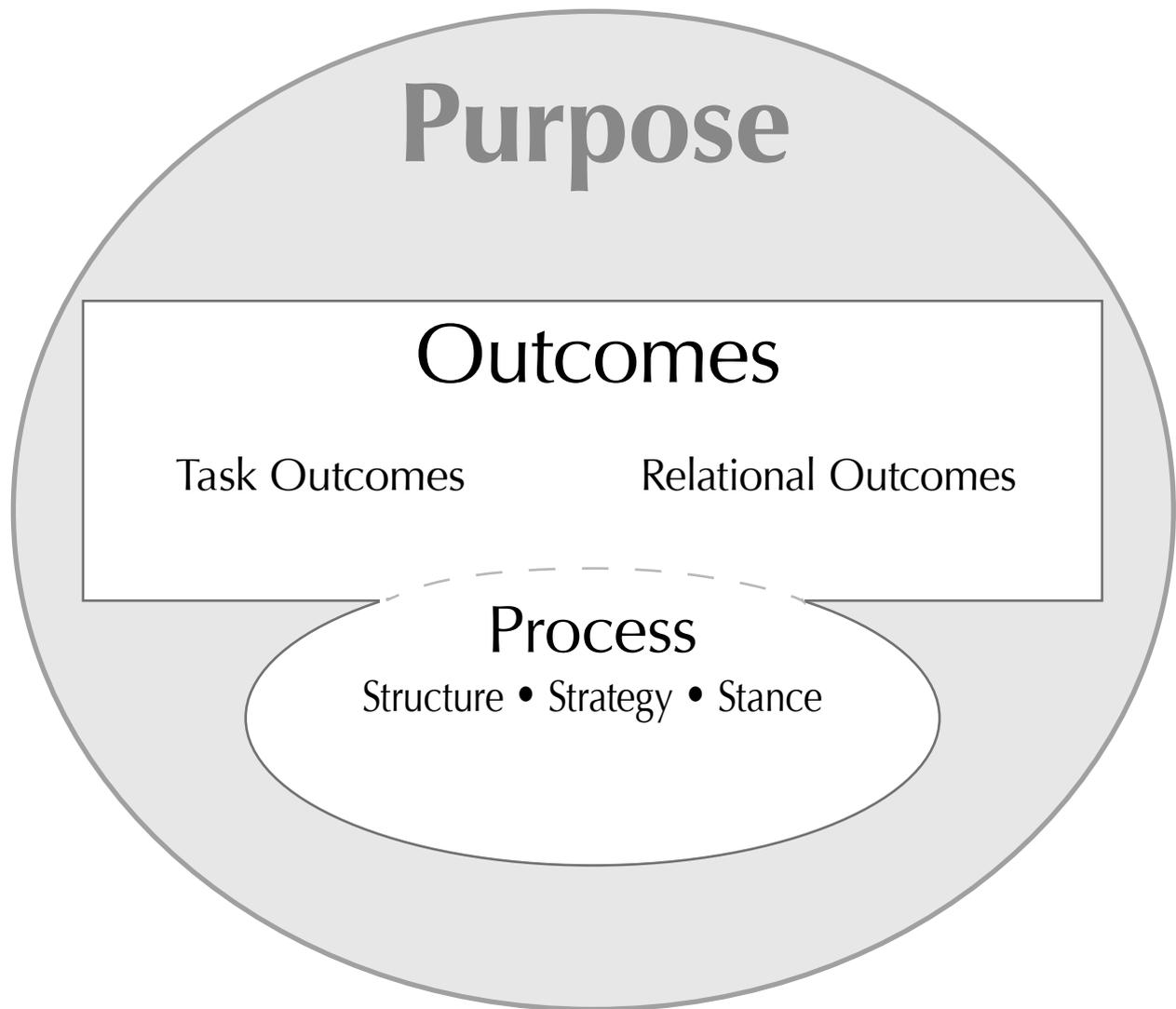
<b>Task</b>	_____		_____		_____		_____		_____	<b>Relationship</b>
<b>Certainty</b>	_____		_____		_____		_____		_____	<b>Ambiguity</b>
<b>Detail</b>	_____		_____		_____		_____		_____	<b>Big Picture</b>
<b>Autonomy</b>	_____		_____		_____		_____		_____	<b>Collaboration</b>

For group leaders detecting patterns and anticipating group dynamics are important design and delivery skills. As you plan for upcoming sessions with this group:

*What are some patterns you anticipate that will inform your design and delivery choices?*

*What structures and strategies might you apply to manage the discomforts that may arise as group members engage with their tasks?*

# The Group Leader's Design Mind



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# Purpose

## The Purpose

**G**ROUP members are often confused by the distinctions between the purpose for doing something and the tasks involved in achieving that purpose. Misguided groups then meet to do something rather than accomplish something, confusing action with outcome.

The purpose is the rallying cry that motivates people to work together towards a common goal. Well-crafted purpose statements are energizing emotional appeals that connect with the deeper aspirations of group members.

For example a group may come together for curriculum work.

The **Task** is:

To revise the middle school curriculum.

However, the **Purpose** is:

To establish aligned concepts and sequenced skills that ensure math success for all middle school learners.

Note that the purpose is, in essence, the answer to: “If this task is completed effectively, what will that produce?” When push-back occurs in groups, it is often about the task, rarely about the purpose.

For leaders, it is important to keep in mind that the purpose needs to be clarified initially and reiterated at subsequent sessions. It is often helpful to post it on a chart in the meeting room. Given the business of life in schools, group members will not necessarily be thinking about the work, and its purpose, between meetings.

### Word Bank

*ensure, promote, assure,*

*maximize, optimize,*

*empower, guarantee,*

*sustain, establish, enrich*

# Structuring Decisions

## Crafting the Container

- Starting the conversation
- Structuring the conversation
- Sustaining thinking in the conversation

Structuring choices greatly affect the outcomes of collaborative group work. These basic design elements set the stage for focusing energy on the task at hand, balancing the participation of group members and most importantly for producing a psychologically safe forum for participants to contribute ideas and to question the contributions of others. Effective design choices increase a group's capacity to address hard-to-talk about topics and shape thoughtful dialogue and productive discussion.

Purposeful structures maximize the efficient use of time and increase the quality of interactions and results. Novice groups require formal structures to scaffold success. More expert groups know when to select formal structures to match the emotional and cognitive demands of their work. Higher performing groups are not harmed by structure. Groups and group members that need it will be greatly aided by tighter designs. It is always wise to remember that not every participant in a high performing group may be personally skilled in group processes. The following two broad categories describe considerations for group leaders.

### Group Size, Composition and Length of Time as a Working Group

Working group size is an often-overlooked variable that affects group task success. Using pairs, trios and quartets increases active participation and establishes a safer working climate. Many groups, both large and small, err in attempting to do the bulk of their work as a committee of the whole. Partners or trios can be pre-assigned, or determined during the work session using pre-recorded grouping sheets such as seasonal partners. With this method, participants mingle and use recording sheets with seasonal icons, exchanging names and creating partnerships in the space allotted. Count-offs or physical repositioning, such as turn to a neighbor or stand and find a colleague are other time efficient ways to subdivide and energize groups.

Group composition is another factor to consider. Criteria for grouping, such as roles, years of experience, work style preference or degree of expertise creates small groups that are specialized or diversified, as is appropriate to the task. This intentional design choice spreads the talent within the larger group and breaks down factions that might exist. Purposely structured pairs, trios or quartets increases success with many tasks. At appropriate points, pairs can join other pairs to widen the conversation.

Length of time as a working group should vary according to task requirements. Small groups are effective for text-based activities, idea generation and data exploration. By varying the length of time that groups work together and regrouping periodically, individuals within a larger group develop deeper working relationships and greater knowledge of one another. Switching partners also provides a period of purposeful movement for energy and brief social interaction. One pattern for intact groups is to establish base groups that meet regularly and employ informal partnering for designated tasks.

### Interaction Patterns, Materials and Space

Structuring the patterns of interaction increases productivity and engagement. As indicated above, most groups are not harmed by structure. By developing a shared repertoire of strategies, protocols and grouping patterns, working groups enhance success and satisfaction. Fundamental structuring moves include: the use of active public recording on chart paper so that all can see ideas and information; providing individual writing time and space to think before a conversation or data exploration starts; using a round-robin pattern for sharing ideas; using a public timer to guide processes; and assigning roles such as that of a facilitator, recorder, and a materials manager. Having supplies such as index cards, sticky notes, pens, pads, markers and chart paper available saves time and allows for flexibility in meeting designs.

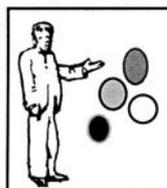
One last consideration is the arrangement of the physical space within which the group is working. Group members need to be able to see and hear one another and have a clear view of charts on the walls and on chart stands during active public recording. Table and chair arrangements need to be adjusted in some cases to facilitate interaction. Too many and too few tables and chairs are equally problematic. Visual clutter in the room is an additional distraction. Key charts noting a projects purpose, outcomes and logistics should be posted prominently where all participants can see them.

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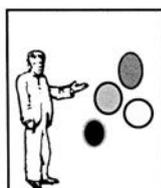
## Three Stances for Leading Groups

**S**KILLED group leaders consciously select the most appropriate stance for engaging their groups. These stances include: presenting, collaborating and facilitating. The leader's intention for the session, relationship to the group, the nature of the task or topic and the intricacies of specific strategies are all critical factors to consider when choosing a stance. Each stance is ultimately defined by who is generating and developing the bulk of the information and analysis of any data being considered by the group. When presenting, group leaders provide information and analysis; when collaborating, group leaders and group members share information generation and analysis; and when facilitating, the group members generate the information and analysis.

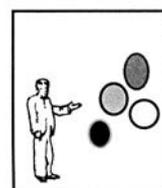
A leader might occupy a single stance throughout a work session, or switch stances at various points. For example, a department chair might introduce a session task and occupy a facilitation stance for the first part of the meeting. At a point of transition, she might then join the group at the table and collaborate as a colleague for the next segment of the meeting. In another case, a principal might frame a task for a leadership team and then present details of a school improvement planning process before switching to a facilitation stance to clarify understanding and determine next steps for the group.



PRESENT



COLLABORATE



FACILITATE

### Present

To present is to teach and transform group members by enriching and extending their knowledge, skills and attitudes. Successful presentations are outcome driven not activity driven. Clarity of outcomes and success criteria for achieving these outcomes are the most important element in planning a speech, seminar or workshop. A rich repertoire of instructional strategies informs the choices available to the presenter. Matching repertoire to clear outcomes through continuous assessment of goal achievement supports flexibility in-the-moment and over time.

By designing group work and presentations as learning experiences for other adults, skillful leaders focus more energy on the learning and the learners, less energy on the content and on themselves as speakers. Knowledge of adult learning and how to productively engage group members is as important as the content itself. In practice, content has little meaning in and of itself. Learners, individually and collectively create meaning from a presentation. By structuring and scaffolding learning experiences for group members, skilled leaders craft presentations that help group members transform information into ideas and ideas into actions.

There are several tensions for thoughtful group leaders when taking a presentation stance. One tension is the trap of expertise. When we have deep knowledge of and commitment to a set of beliefs and ideas, our passions can sometimes overcome our patience. Our preferences can also become our prescriptions, which if shared with conviction and credibility can close off group exploration of ideas and the development of alternative approaches and fresh ways of exploring issues. Another tension is the belief that group leaders need to be experts on a topic to be credible with the group. By making ideas and text the expert, group leaders provide expert information without having to be the expert on every topic. Expertise is ultimately a group capacity in high performing groups and not the province of any one person.

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## Collaborate

To collaborate means to work together. In this stance, the group leader and group members co-develop information, ideas and approaches to problems. Mindful group leaders also use this stance as an opportunity to model the ways in which professional colleagues interact as a standard for professional practice. This stance signals trust and respect for group members and a belief in their capabilities as thinkers and professionals. It is important for team leaders, department heads and other members of working groups to save a place at the table for themselves as colleagues so they can be in the room with peers as equals and not be perceived as taking a “one-up” position relative to the group. By preserving such a space, the switch from feet to seat then signals this shift in stance after framing tasks, presenting information or facilitating processes.

Room arrangements and where the group leader is positioned relative to other group members indicates when this is the operating stance. By sitting side-by-side, focused on common information, problems or issues, the group leader physically and symbolically joins the group as an equal. Pronoun use signals stance, as well. By using phrases like “Let’s think about....”, “Let’s generate....”, or “How might we....?”, group leaders invite participation and remove themselves from the spotlight. Group leaders need to carefully monitor their actions when occupying this stance. Their own enthusiasm and interest in the topic or issue at hand may override the intention to co-create ideas and possibilities. False collaboration may build resentment or become a disguised presentation.

Collaboration is hard work. Purposeful talk requires purposeful listening. Group leaders need to know when and how to integrate their own energies with those of other group members. When and how to advocate for processes or specific ideas requires consciousness, tact and patience. As they collaborate, skilled leaders keep part of their awareness on the balcony to monitor interaction patterns, idea flow and group development. Knowing when to withhold their own ideas and listen is as important as knowing when to join the conversation.

## Facilitate

To facilitate means to “make easier”. In flexing to a facilitative stance, group leaders structure sessions and meetings designed for dialogue, discussion, information processing, planning, problem-solving and decision making. Facilitative group leaders direct the procedures used during a session by choreographing the energy within the group and maintaining a focus on one process and one content at a time. A flexible array of nonverbal and verbal tools supports facilitators in this work. While many of these skills are also the tools of presenting and collaborating, they take on added importance within this stance as skilled leaders focus group members’ energy on ideas, information and processes. Permission to facilitate is not derived by role. The emotional state of the group, the time of day, and the topics before the group are some of the variables that influence a group’s dynamic. Group member engagement, cooperation and willingness to take emotional and cognitive risks are the major manifestations of their agreement to engage productively with a group leader taking a facilitation stance.

The facilitation stance assumes that the group leader is taking a neutral position towards the topic before the group. If he or she has preferred outcomes or nonnegotiable positions then taking this stance is not credible with the group. In addition, a leader may need to temporarily shift to a presentation stance to provide information that might move the group’s work forward. Flexing in and out of this stance requires thoughtful framing at the start of the session, especially for emotionally charged topics.

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# Principles for Leading Groups

**A** SET OF basic principles of practice guides the work of skillful group leaders. Thoughtful application of these elements leads to mastery of the art and science of group leadership, supporting groups in greater task accomplishment and improvements in working relationships. These principles form the invisible inner structure that produces confident, efficient and effective orchestration of group processes in meetings, seminars and workshops. They underpin the design and delivery of high stakes sessions, especially when a group is working on critical projects, emotionally charged material and/or relational tensions in the room.

The principles are associated and operate as a package. Many of them work together in bundles as group leaders focus the attention of group members, frame tasks and processes, present information and facilitate productive conversations. For each principle, there is also a list of associated principles.

As the building blocks of successful group leadership, the principles become factors for anticipating and preparing for sessions, analyzing procedural glitches as they occur within group work and recovering focus and flow when it is appropriate to redirect a group in a task or process.

To develop fluency with the principles for leading groups requires isolating specific examples for purposeful practice in low-risk settings. There are many opportunities in daily work with groups both small and large to apply these principles. Frequent and consistent use is essential for internalizing these elements so that they can be applied with grace and confidence, especially when the stakes are high.

<b>Principles</b> Code  E- can explain M- can model A- apply when I remember I- integrated into my practice	<b>Learning Goals</b>  • New learning • Applying & refining skills • Integrating skills	<b>Practice Opportunities</b>
Backtrack and Foreshadow ____  Capture Attention First ____  Choose Voice ____  Create A Third Point ____  Decontaminate Problem Space ____  Describe What, Why, How ____  Establish Spatial Anchors ____  Go Visual ____  Make Text The Expert ____  Separate Attention from Message ____  Show-Don't Say ____  Signal Stance Change ____  Use Pronouns with Purpose ____		

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## Backtrack and Foreshadow

To backtrack and foreshadow is to remind group members of where they've been and to alert them to what is to come. Skillful leaders use visual references and verbal elaboration to backtrack and foreshadow such elements as: process steps, task stages and outcome targets. These physical, cognitive and emotional markers support group members in managing the flow of the work by reminding them of what has been accomplished and what lies ahead.

Group members who are embedded in the tasks at hand don't always stick their heads up to notice the flow of goal achievement for their tasks and relationships. Because groups are not always aware of their progress, highlighting what has been accomplished supports a group cognitively and emotionally, while keeping the bigger picture in mind.

Backtracking and foreshadowing helps group members manage time and energy by establishing an appropriate pace for the work. They can then apply their full focus to the present tasks and processes and not become distracted by project elements that may reside in future sessions once current efforts are successfully completed.

### Associated Principles:

*Choose Voice      Use Pronouns with Purpose*

## Capture Attention First

To capture group members' attention means to establish a shared focal point for their collective physical, cognitive and emotional energies. Effective group leaders capture group members' attention first --- before starting a session, presenting information, giving task directions or asking questions. By pausing to ensure a central point of focus, the confident leader goes slow to go fast. This principle is especially important when making transitions between activities, such as moving from small group to larger group processes or returning from breaks.

This principle may seem counterintuitive when time is tight and stakes are high. However, time is often lost or wasted when group members are not fully attending to purpose statements or process directions. The resulting lack of clarity can lead to confusion, frustration and annoyance for those group members who were listening and are ready to begin. Establishing a pattern of capturing attention first unifies and focuses the group as a whole that is ready to move forward together.

### Associated Principles:

*Choose Voice      Establish Spatial Anchors      Separate Attention from Message  
Use Pronouns with Purpose*

## Patterns for Focusing Attention

- Freeze body
- Freeze gesture
- Use a credible voice
- Break and breathe
- From a new space deliver a new message

## Choose Voice

Human speakers naturally vary their vocal pitch to match the intention of their communication. Statements typically have an intonation pattern that is different than the pattern for a question. To increase participant engagement, group leaders choose a voice pattern that is appropriate to the intended purpose, operating across a vocal range that runs from a credible to a more approachable tone (Zoller & Landry, 2010; Grinder, 1997). By developing purposeful vocal patterns, successful leaders communicate clear messages and promote trust.

The credible voice has narrow range of modulation and flat tone that drops at the end of a sentence. Speakers produce this tone by holding their heads still and dropping their chins and shoulders to relax the neck and diaphragm muscles. This physical pattern works to lower the pitch while projecting a sense of purpose and authority to the message being conveyed. Leaders use the credible voice to focus attention, frame tasks and processes and present information. This voice communicates confidence and credibility.

The approachable voice has a wider range of modulation with a rising tone at the end of a statement. Speakers produce this tone by leaning towards the group, maintaining eye contact and head movement. This physical pattern signals high engagement and that the leader is seeking information or wishing to explore the information being presented. Leaders use the approachable voice to create a sense of psychological safety, to invite thinking, encourage responses and communicate acceptance of ideas.

### Associated Principles:

*Capture Attention First*    *Describe What, Why, How*    *Separate Attention from Message*  
*Signal Stance Change*    *Use Pronouns with Purpose*

## Create a Third Point

A third point is an inanimate object in the room that becomes the focus of attention. Productive group work often requires the skillful application of a third point to focus a conversation and create the appropriate level of emotional protection so individuals and groups can engage with the topic and one another (Zoller & Landry, 2010; Grinder, 1997). Three-point communication operates with the group leader as one point of the triangle, the group as the second point and some data or focusing information as the third point. For group work, the third point might include a chart or projected slide containing a data-display, purpose statement, problem scenario, project outcomes, timelines or other pertinent information.

This same principle applies when pairs are working together with a “third-point” on the table between them. In that case each partner is a point and the text or graphic material is the third point. Third points might include professional articles or text selections, samples of student work, displays of quantitative or qualitative data, or expected standards.

A focus on the third point increases psychological safety by separating the third-point information from the group leader and centering group-members talk and eye contact on the “data” and not on one another. Skillful group leaders support this process by depersonalizing the information being considered.

**Associated Principles:**

*Go Visual    Establish Spatial Anchors    Show-Don't Say    Use Pronouns with Purpose*

### **Decontaminate Problem Space**

Problem spaces develop in a meeting or seminar room when the leader or a participant shares information that triggers some form of strong emotions for group members. Because location holds memory, thoughtful group leaders are purposeful about their use of space as they deliver information and feedback to their groups. Space gets contaminated when a message that might be perceived as negative or corrective is given from a location that the group associates with facilitation or presentation.

To intentionally contaminate a space for a potentially problematic message and decontaminate protected spaces move to the side of the room away from such preserved spaces and call the group to attention from there. This physical shift is especially important when the group leader needs to directly intervene with a group that has gone off course or when a process has broken down. By delivering the corrective messages from this now “contaminated space” the leader separates the visual and verbal intervention from the prime presentation and facilitation spaces. NOTE: It is important to break eye contact and not talk as you walk between the facilitation space and the intervention space. It's as if you are playing the part of two different characters in a theater production; the facilitator/ presenter character speaks from one area, the intervening leader from another.

Specific events or previous speakers sometime contaminate whole meeting spaces. In those instances, the room arrangements and grouping patterns need to be adjusted to clear the space, create new sightlines and new relationships between participants. Removing chairs and tables or in some way altering the seating arrangements and visual information on the walls can decontaminate and freshen the space to energize more productive work patterns.

**Associated Principles:**

*Go Visual    Establish Spatial Anchor    Separate Attention from Message*

## **Describe What, Why, How**

Skillful group leaders intentionally describe the what, why and how of structures, strategies and protocols. This principle embodies a spirit of transparency and communicates to the group the thinking behind design choices and the benefits to them as individuals and as a group. The “what” names the structure, strategy or protocol with which the group is about to engage. The “why” describes the intended outcomes for these choices for the group and the work. The “why” includes benefits such as greater task focus leading to project success and outcomes such as time efficient task completion, more balanced participation and the opportunity for all voices to be heard. The “how” offers the directions and describes the procedures and processes that will be involved. The “how” may require graphic support and modeling for multi-step or complex processes.

While there is typically some “boilerplate” language for strategies and protocols, the “whys” need to be customized to the particular group and its context. When group members understand why they are being asked to do something, especially if that something breaks or upsets established patterns, there is reduced push back, resistance or subversion for the procedures and processes.

### **Associated Principles:**

*Choose Voice*      *Use Pronouns with Purpose*

## **Establish Spatial Anchors**

A spatial anchor is an area in a presentation or meeting room that is assigned a specific purpose. Spatial anchors are based on the psychological phenomena that locations hold memory. By establishing spatial anchors in meeting and presentation spaces, group leaders connect ideas and emotions to specific locales in the room. These spaces then anchor the functions and essential content delivered or facilitated from those spots. Consistently using the same spot for the same purpose marks the purpose for that location. These functions might include a space for calling the group to attention; a space for giving directions, a space for presenting information and a space for eliciting participant comments and questions. Applying this principle is especially important with large groups.

Spatial anchors are vital for holding important information for ongoing projects. Anchored graphics such as timelines, product specifications, legal requirements and project outcomes should be posted on a sidewall that is visible to the group. When group members engage with a project over time, these nonnegotiable items need to be visibly alive in the room and held in a space where the leader can refer to them away from other protected spaces in the room.

### **Associated Principles:**

*Go Visual*      *Decontaminate Problem Space*

## Go Visual

Skillful group leaders go visual for hard to talk about information. We live in a graphically rich world in which many learners prefer visual forms of input, yet we try to communicate sensitive or complex messages orally. When the information is emotionally loaded or conceptually complex, many listeners have trouble tracking what is being said. This is especially true when listeners experience emotional flooding and drop into an internal conversation and stop attending to the leader.

Oral input makes listeners dependent on the speaker and establishes a one-up relationship causing the listener to ask for clarification or repetition of the message (Grinder 1997). Visual displays allow participants a greater degree of autonomy since they can take in the information for themselves and examine the details as many times as they want to. By getting the visual sources off to the side the leader can separate the message from the messenger and facilitate a three-point conversation about the displayed information. (See Create a Third Point)

### Associated Principles:

*Create A Third Point    Separate Attention from Message    Show Don't Say*

## Make Text the Expert

Making text the expert moves the attention of group members from the leader to the information being considered. By applying a variety of paired and small group protocols, leaders increase group members' engagement with ideas and with each other. This deeper engagement and small group interaction increases psychological safety and allows for the messiness of true learning. Rather than focus on what the leader thinks about the information, group members develop their own understanding and questions about the material.

Text as expert or some form of media as expert brings a deeper knowledge base and perspective to the group. This is especially important with controversial topics or when a group is exploring options that might be challenging long-established patterns in the organization. Applying this principle also allows leaders to work with ideas and information more confidently when they or group members do not feel knowledgeable about the topic.

### Associated Principles:

*Create A Third Point    Go Visual    Show Don't Say*

## Separate Attention From Message

Calling a group to attention is always some form of an interruption. No matter how skillfully performed, the attention move intrudes on the thoughts, conversations and present engagement of group members. At the beginning of meetings and other work sessions participants are likely to be engaged in social conversations or connecting about some shared project. During work sessions the

shift from small group to large group work breaks into the processes occupying those groups. In many cases, group members stop talking and turn toward the group leader but may not have fully focused their attention on what the leader is then attempting to communicate.

Given these tendencies in groups, thoughtful leaders separate their attention moves from the messages they want to transmit by standing still (See Capture Attention First) using a credible voice and a frozen gesture then applying a pattern called break-and-breathe to deliver their message from a slightly different space (Grinder 1997). To break-and-breathe, the group leader exhales, breaks eye contact with the group and takes a small step to establish a space for the new message.

**Associated Principles:**

*Capture Attention First   Choose Voice   Establish Spatial Anchors   Use Pronouns with Purpose  
Signal Role Change*

### **Show Don't Say**

By showing and not saying what they wish to communicate group leaders attract the attention of group members and focus it on essential messages. Human brains are wired to detect changes in the immediate environment. Our involuntary attention systems note these changes and respond accordingly. When group leaders “show” but “don't say” they engage the involuntary attention system of group members and efficiently focus their attention on the desired information.

The principle operates when a group leader points or gestures toward the intended focus, such as a screen or chart, using a frozen gesture. While keeping his or her own eyes on the screen, the leader invites group members to bring their attention to the focal point. For example, a leader might say in a credible voice: “Please bring your attention in this direction and consider the question noted here.” The group's eyes will follow the leader's eyes to the screen and by not reading the question aloud, the group leader encourages visual processing and deeper engagement. This principle also applies when a group leader uses a physical gesture such as holding up a number of fingers to indicate a time span for task completion. Again, the key is to show but not say the message.

**Associated Principles:**

*Capture Attention First   Separate Attention from Message*

### **Signal Stance Change**

Skillful leaders utilize three primary stances for structuring interaction patterns with their groups: facilitating, collaborating and presenting. The ability to switch between stances is an essential capacity for successful work with groups. Group members need to know which stance a leader is employing in a given moment. Successful leaders label the present stance they are taking so group members know how to relate to the leader in that moment and how to consider any information or ideas that the leader

is offering. A leader's choice of stance is based on his or her intention and purpose at any given time. Effective group leaders have an extensive repertoire of strategies and skills related to the three stances that support group development, task focus and relational development. To support group members in these tasks, mindful group leaders signal when their stance is changing.

To signal stance change requires both verbal and nonverbal clarity and congruence. For example, a leader who is operating in a presentation stance might signal a change to a facilitative stance by verbally announcing the change, breaking eye contact with the group, physically moving to a new space in the room and shifting from a credible to a more approachable voice. Or, a leader in a facilitative stance would verbally announce a change to a more collaborative stance, take a seat at the table with the group and join the conversation on a more equal footing.

#### **Associated Principles:**

*Choose Voice*

*Establish Spatial Anchors*

*Use Pronouns with Purpose*

#### **Use Pronouns with Purpose**

Expert group leaders use pronouns with purpose. Pronoun use conveys the relationship between the leader and the group, as well as the relationship between the group and the work. It might be “our” work, “your” work, or “the” work. If the leader is a member of the group, such as a team leader or department head, it is most likely “our” work with the leader being a full participant in the effort. If the leader is not a working member of the group, such as a principal or curriculum consultant, it may then be “your” work, especially if the leader is framing the task but will not be participating in the hands on completion of the project. “Your” would also be most appropriate for leaders who are from outside agencies, as well. In the case where the task is emotionally hard to handle for some or all group members, or the relationships are unclear, the safest course is to use neutral language and say “the” work.

Inappropriate pronoun choice can alienate group members by implying that they are in some way working for the leader and not for some greater purpose. When leaders say things like, “here’s what I want you to do” or “please give me your attention”, they imply a power or charisma relationship in which the group is there to serve the leader’s needs. Instead, thoughtful leaders say, “The next task is . . . “ or “Please pause and turn your attention to the screen for the next steps in the process.”

#### **Associated Principles:**

*Capture Attention First*

*Create a Third point*

*Describe What, Why, How*

*Separate Attention from Message*

*Signal Stance Change*

# When Things Go Wrong

## Applying the Principles for Leading Groups

**Reflect on a recent work or learning session.**

**1. Identify instances where processes broke down or the group lost focus or momentum?** Getting started on time? Adhering to a process or protocol? Exploring one topic at a time? Balancing participation? Making transitions between topics or processes? Coming to closure and clarifying accomplishments and next steps?

**2. Select critical junctures that you might have facilitated more confidently or productively.**

**3. With critical junctures in mind, select principles to apply when instances like these occur with this or other groups.**

**4. Craft specific language and nonverbal moves you might make in settings such as you've described above as you employ your selected principles.**

# Recovery

## Structuring Decisions:

The first level of recovery is to consider modifications to the structuring decisions guiding the design and delivery of the session.

### 1. Working group size, composition and length of time

- Do your working groups need to be modified? too large? too small? wrong composition?
- Do you need to adjust the time that group members engage with one another? Less time? More time?

### 2. Interaction patterns, materials and space

- Do the strategies and structures you are applying require tightening or loosening in any way?  
e.g. providing time to think and write before sharing, adding a round-robin pattern, using a public timer, using public charting to focus attention.
- Are materials readily available for recording and highlighting information?
- Are resource materials and access to technology available to support the work?
- Are table and chair arrangements and wall displays arranged appropriately to support the work  
e.g. adding or subtracting chairs to avoid energy drains from open spaces or energy blocks from double layers, adding or removing tables, modifying table arrangements (U-Shape, square, chevron), anchoring charts with key information, removing visual clutter.

## Direct group leader intervention:

If needed, apply the following patterns.

Anchor a neutral space away from your facilitation or presentation space. Then do one of the following:

- **State the issue as a principle or abstraction.**

*“When there is more than one topic on the table at a time, group members have trouble focusing their energy which wastes meeting time.”*

Then reframe the task and process focus. (Modify as needed)

- **Share the specific behaviors that are problematic as “data” and ask the group about the impacts of these behaviors?**

*“Since the break there has been an increase in ‘storytelling’. Five people have shared different examples. What is your sense of the ways this might be affecting your task accomplishment?”*

Paraphrase participant responses then reframe the task and process focus. (Modify as needed)

- **Take the group members to the balcony and inquire about their perceptions and feelings regarding what is transpiring.**

*“Please pause. Mentally step back from the conversation and take a look from the balcony. What is your sense of what is occurring and how that is influencing your participation?”*

Paraphrase participant responses then reframe the task and process focus. (Modify as needed)

# If... Then...

If I remember to . . .

Then I'll be able to . . .

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# T-Chart Journal

## A learning and unlearning journey

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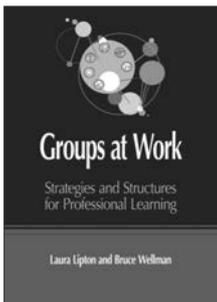




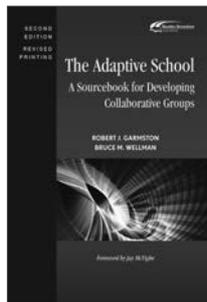
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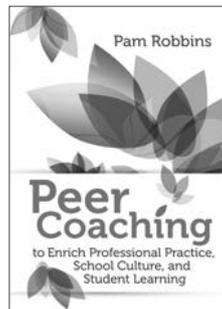
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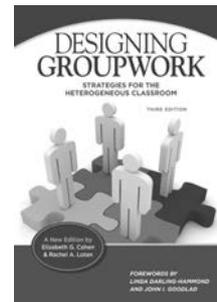
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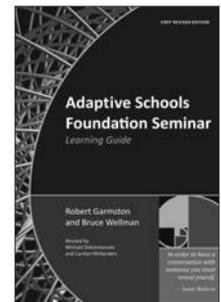
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