

The top half of the cover features a purple background with a network of light blue circuit lines. Various icons are scattered throughout, including a checkmark in a circle, a bar chart, a stack of papers, and a control panel with four buttons. The text 'SECOND EDITION' is positioned in the upper right corner within a dark blue rectangular box.

SECOND EDITION

Data-Driven Dialogue

A Facilitator's Guide to
Collaborative Inquiry

Bruce Wellman

Laura Lipton

The bottom half of the cover features a blue background with a network of light blue circuit lines. The same icons seen in the top half (checkmark, bar chart, stack of papers, control panel) are repeated here, creating a symmetrical design.

Data-Driven Dialogue:
A Facilitator's Guide to Collaborative Inquir, 2nd Edition

By
Bruce Wellman and Laura Lipton

Study Guide

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Data-Driven Dialogue: A Facilitator’s Guide to Collaborative Inquiry **Developed by Peggy Olcott, MiraVia Associate**

About This Guide

This Study Guide offers a structured journey through the concepts and strategies presented in *Data-Driven Dialogue: A Facilitator’s Guide to Collaborative Inquiry*, by Bruce Wellman and Laura Lipton. This Guide will support school and district leaders, curriculum and instructional specialists, and professional learning communities who are interested in extending their knowledge, skills and strategies for engaging in authentic, challenging, and productive conversations focused by data. We encourage facilitators to tailor questions to match the needs and interests of their specific groups. We offer a selection of possibilities in each section of this Guide to model some of these options.

This Study Guide is divided into six sections or study areas. There is flexibility in each area to provide opportunities for individual and group study. The “Do” and “Apply” sections in each study area can be done either within a session or between sessions. The questions in each of the sections may be used for group discussion or for personal journal entries.

The amount of time allotted for each section is dependent on each study group and the intended purpose for this Guide. The sessions are designed to be somewhat contiguous. We recommend that you complete them in the order they are presented. Most sessions can be completed within thirty to sixty minutes.

Suggested format for a thirty minute study:

Prior to the Session:

- Respond to the questions in the *Activating & Engaging* Phase.
- Read the assigned section in *Data-driven Dialogue* that is designated in the *Exploring & Discovering* Phase.

During the Session:

- Respond to the questions as a group discussion in the *Exploring & Discovering* Phase

Following the Session:

- Complete the “Do” and “Apply” in the *Exploring & Discovering* Phase.
- Respond to the questions in the *Organizing & Integrating* Phase in a personal journal entry.

Suggested format for a sixty minute study:

During the Session:

- Respond to the questions as a group discussion in the *Activating & Engaging* Phase.
- Respond to the questions as a group discussion in the *Exploring & Discovering* Phase.
- Read the assigned section in the *Exploring & Discovering* Phase.
- Complete the “Do” and “Apply” in the *Exploring & Discovering* Phase.
- Respond to the questions as a group discussion in the *Organizing & Integrating* Phase.

In both suggested time formats allow a period at the beginning of each session for participants to share notes, artifacts, and reflections of applications from earlier study.

Introduction/CHAPTER ONE: CHANGE IS THE CONTEXT: WHY WE TALK

Focus:

- Guiding Assumptions for Data-Driven Inquiry
- Driving Forces of School Change
- Understanding and Navigating Transitions in Change

Activating & Engaging

What are some of the new initiatives impacting your school and role as an educator?

Exploring & Discovering

What are some of the ways that current educational trends are affecting your school(s) and your role as an educator?

Read:

Guiding Assumptions for Data-Driven Collaborative Inquiry – pages xi.

Chapter One: Change is the Context: Why We Talk - pages 1-8.

Do:

- If you were to choose one guiding assumption that particularly caught your attention, which one might it be and what are some connections you are making about it? How might those assumptions influence how a group responds to the change forces?
- Review each description of the four forces affecting school change.
 - What are some specific examples in your work setting that illustrate a **shift to**:
 - § Teaching as collaborative practice
 - § A learning focus
 - § Internally motivated improvement
 - § Continuous growth
 - What patterns are you noticing? Which areas of focus are already in place? Which shifts or stretches are still needed?
- What might be some applications of William Bridges' work in supporting your colleagues' reorientation to forces of change?

Apply:

- Identify a group with whom you work on a consistent basis.
 - Choose one of the four driving forces that might have a particularly potent impact on your school setting at this time.

- Collect notes and/or artifacts that illustrate your group's responses to this particular change force and bring back to Session Two.

Organizing & Integrating

How might you apply this information to support systematic, continuous improvement?

CHAPTER TWO: FACILITATIVE PATTERNS: CRAFTING THE CONTAINER, PARTS I & II

Focus Part I:

- Characteristics of Productive Groups
- Skillful Facilitation
- Tools for Talking About Data

Focus Part II:

- Learning-Focused Verbal Tools for Inviting and Sustaining Thinking
- Three Types of Discourse

PART I

Activating & Engaging

Think of a group that is particularly effective and productive. What are some of the characteristics of that group?

What are some of the specific factors that contribute to productive group work?

Exploring & Discovering

How does a skillful facilitator create psychological safety, balance participation among members, and support group development?

Read:

Chapter Two: Facilitative Patterns: Crafting the Container - pages 9-top of 22

Do:

- Compare and contrast the three areas for group development (Attention to task, process and relationship with a group you know well.
 - To what extent are all three areas balanced in importance within your group?
 - Given that all three areas are important, what might be some next steps to enhance your group's development?
- As you consider the Mental Model for Facilitation (Table 2.1), which elements are already part of your repertoire? Which ones are stretch areas?
- Reflecting on the Six Elements of the Frame (Sidebar page 15), which elements do you typically include and which need to be added to your framing statements.
- Considering the Habit Cycle as it relates to the Blocks to Understanding that occur during listening, which blocks might you need to work on in yourself and in your

group?

Apply:

- Make a copy and complete the *Group Development Rubric* (Appendix B, pp. 166-168) for a group with whom you are currently working. (Note: You will be doing a post assessment after Chapter 3.)
 - Choose one strand as a goal for your group's continued growth. Consider how you will monitor progress toward the goal and possible strategies for meeting it.

Organizing & Integrating

- In what ways are you more intentional about choices you are making as either a member of a group or its facilitator?
- What are some new connections you are making and some new goals you are setting for your own professional practice?

CHAPTER TWO: FACILITATIVE PATTERNS: CRAFTING THE CONTAINER, PARTS I & II

PART II

Focus Part II:

- Learning-Focused Verbal Tools for Inviting and Sustaining Thinking
- Three Types of Discourse

Activating & Engaging

What verbal communication tools are particularly potent in producing thoughtfulness for groups and the individuals within the group?

Exploring & Discovering

What verbal communication tools do you use often and with automaticity? To what extent are they present in other group members? How does this support or impede the group's productivity?

Based on your experiences, what are the differences between *dialogue*, *discussion* and *decision-making*?

Read:

Chapter Two: Facilitative Patterns: Crafting the Container - pages 22-47

Do:

- Complete the paraphrasing exercise on page 29.
- Craft three invitational questions embedding the three essential elements (i.e. invitation stems, cognitive focus, topic). Use samples on page 34 as a guide.
- Complete the exercise on probing for specificity on page 39.
- Think about a current issue for a group of which you are a member.
 - To what extent has the group engaged in inquiry using the tool of dialogue to frame the issue, uncover underlying assumptions, and explore perspectives?
 - Consider how you might influence your group members to become more skillful in their use of dialogue.
 - Consider how you might influence your group members to become more skillful in their use of discussion to set up more efficient decision-making.
 - Reflect on the Four Barriers to Effective Decision Making. Which ones seem to be operating in your group as it addresses the current issue with which you are engaging.

Apply:

- Identify one or more of the Tools for Talking About Data as a focus over the next month (see page 18).
- In your next meeting(s), as a participant or facilitator, intentionally apply your verbal and non-verbal skills to encourage dialogue and create shared understanding.
 - Collect notes and artifacts on the result of your implementation and bring them to the next session.
 - Choose one of the Six Tools for Talking about Data for your own growth as either a member of a group or a facilitator. Identify different settings in which to apply the new skill.
 - Keep a journal of your findings.

Organizing & Integrating

What are some of the discoveries you're making about the influence of your verbal tools in the functioning of the group?

What learning strategies will you employ to increase your skillfulness in the use of these tools?

CHAPTER THREE: A MODEL FOR COLLABORATIVE INQUIRY

Focus:

- The Collaborative Learning Cycle
 - Purpose and possibilities of each phase
 - Importance of effective implementation of each phase

Activating & Engaging

What are some typical responses from group members when you begin to look at data?

To what degree are your collaborative inquiries focused on learning from and with the data?

Exploring & Discovering

When you and a group work with data, what are some processes and protocols that you use? In what ways have these processes supported your group's understanding of the data, helped define the problem(s), and explored possible options and solutions?

Read:

Chapter Three: A Model for Collaborative Inquiry - pages 49-65

Do:

- Summarize the intentions and purposes of each phase of the Collaborative Learning Cycle. Add your perspective on the importance of effective implementation.
- Review the questions in each phase and identify the kind of thinking processes they elicit.
- Choose several questions to incorporate into your work with groups and data exploration. Pay attention to the impact of your questions on your colleagues' thinking and their understanding of the data.
- Reflect on a recent data exploration. Which of the six causal categories emerged as your group developed theories of causation.

Apply:

- Identify a group that is currently working with a set of data. Apply The Collaborative Learning Cycle for use with this group.
 - Complete the *Group Development Rubric (Appendix B, pp. 166-168)* again and compare and contrast the results of the two assessments.
 - Bring reflections regarding your use of the cycle to the next session.

Organizing & Integrating

What are some insights that you are taking away that will influence your work with groups and data in the future?

CHAPTER FOUR: A DATA PRIMER

Focus:

- Types of Data and Their Purposes
- How to Choose Data

Activating & Engaging

In your role, what are some specific examples of data that you use to determine student growth? What kinds of information do you gain from these data?

Exploring & Discovering

Think About:

Think about a current issue in which you are using data to inform your decision-making.

- How is the data chosen?
- To what extent do you draw upon multiple sources?
- In what ways are data typically presented?

Read:

Chapter Four: A Data Primer – pages 67-81.

Do:

- Given the issue you identified earlier, list potential types of data that might expand your thinking.
- Using the matrix on page 70, sort these examples of data into different categories on the worksheet on page 13 of the study guide.
- What are some patterns you are noticing?

Apply:

- Identify an issue in your own work setting that you are interested in collaboratively exploring further. Use the worksheet on page 14 of the study guide to record your thinking.
 - What do you and colleagues want to know? Develop question(s) to begin the inquiry process for this issue.
 - Determine at least three diverse data sources you might tap in order to explore your issue. Include both qualitative and quantitative data.
 - Consider how best to visually represent the data sets.

§ □ Bring examples of the data displays to the next session. Be ready to share your reflections about the impact of the data choices and displays.

Organizing & Integrating

What are some generalizations you can make about the impact of question framing, data choices, data displays and the information gained from collaborative inquiry?

**WORKSHEET:
SOURCES OF DATA**

DATA	QUANTITATIVE	QUALITATIVE
Student Performance Data		
Program Data		
Community Data		

**WORKSHEET:
CHOOSING WHICH DATA TO COLLECT**

1. Identify an issue in your own work setting that you are interested in collaboratively exploring further. (*A curriculum gap, an instructional gap, student skill deficit, student behavioral pattern, etc.*)

2. Develop question(s) to begin your inquiry process. Record them below.

3. Determine at least three diverse data sources you might tap in order to explore your issue. Include both qualitative and quantitative data.

4. How might you represent the data? Identify and/or sketch possible representations for the data.

CHAPTER FIVE: TOOLS FOR TEAMS

Focus:

- Decision-Making for Effective Facilitation
- Facilitation Tools and Strategies

Activating & Engaging

As you think about groups in which you have been a member, what are some of your hunches about the decisions the facilitator made to support productivity and group development?

Exploring & Discovering

When working with data, what are some considerations you make regarding the size of the group, its skillfulness in working together, the degree of structure needed for productivity, and the importance of balancing participation of all members?

Read:

Chapter Five: Tools for Teams – pages 83-141.

Do:

- Compare and contrast the key variables for managing decisions with the thinking and planning you and others have engaged in to support your group's work around data (see side bar page 84).
- Choose one area for more intentional, specific planning and consideration. Be ready to explore the impact it has on enhancing the group's work.

Apply:

- Select one or more strategies you will use for an upcoming session with a group. If possible, choose strategies that support each of the three phases of the Collaborative Learning Cycle (Activating and Engaging, Exploring and Discovering, and Organizing and Integrating). See also *Appendix C: Strategy Stacks*, pages 169-170, and *Appendix D: Ten Strategies for Getting Started*, pages 171-172.
 - Reflect upon the impact of the selected strategies on the group's skillfulness in working together and with the data.
 - Be ready to share specific examples of these outcomes at the next session.

Organizing & Integrating

If you could take a balcony view of your work with the group, what might be some things you are now more conscious of, both internally and externally?

CHAPTER SIX: SEEING SYSTEMS: STRUCTURES AND CAPACITIES FOR CONTINUOUS SCHOOL

Focus:

- Leading with a Systems View
- Importance of Clear and Agreed Upon Standards
- Essential Infrastructures and Capacities to Support School Improvement

Activating & Engaging

How might you describe the interrelationships and tensions between your school and/or district's multiple school improvement initiatives?

Exploring & Discovering

As you think about the importance of clear, agreed upon standards, which ones do you and your colleagues apply most often in your daily practice to support increased student learning? (Consider standards for content, performance and opportunities to learn.)

Read:

Chapter Six: Seeing Systems: Structures and Capacities for Continuous School Improvement – pages 143-153.

Do:

- Use the chart on page 144 to explore a curricular or instructional initiative in your setting. What are some examples in each of the key areas?
- Which elements appear to be most developed and which appear to be least developed? Based on your reflections, what might be some implications and next steps for your system?

Apply:

- Using your example initiative (see above) consider the following:
 - To what extent is a systems lens evident in this initiative?
 - Choose one element within one of the infrastructures as a focus for the next several months.
 - § Create an action plan including steps/strategies for achievement, timeline, criteria for success, and benchmark measures.

§ □ Create a portfolio of artifacts illustrating progress and reflections of lessons learned.

Organizing & Integrating

As you continue to support groups who engage in collaborative inquiry, what are some areas for your own personal growth that you want to refine and enhance?