

Report to the Lexington School Committee and Employees of the Lexington Public Schools Improving Professional Relationships in the Lexington Public Schools

In a period of rapid change, staff members and administrators of the Lexington Public schools are experiencing enormous challenges as they grapple with the difficult task of forging productive working relationships with one another while maintaining the district's historic commitment to high levels of student achievement. The resulting tensions are producing difficulties in organizational functions, affecting human relationships and job satisfaction for many employees at all levels within the district.

What has been framed as an employee morale issue has roots in multiple causal factors. Some of these drivers are internal to the organization, emerging from the district's history, leadership changes and working relationships among staff members. These ultimately become issues of climate and culture in the organization. Other drivers are external to the organization, and are related to economic, political and policy forces that are pushing on all school districts in the state and the country. A final driver that merges the internal and external forces is the influence of the current knowledge bases on learning and teaching and the organizational practices that support high levels of achievement for all students. These changes in practice are occurring in both the classroom and the meeting room, requiring related shifts in the beliefs, values and behaviors of all employees across all roles. One critical change is the shift from a culture of autonomy to a culture that supports high levels of professional collaboration.

In spite of these pressures, a consistent message flowed through the interview and focus group sessions: Teachers expressed admiration and respect for the strengths and expertise of their colleagues, their passion for teaching, and for the support of education and the arts by parents, the community, and the Lexington Education Foundation.

Given the many outstanding characteristics of the district, the purpose of this improvement process is to identify areas of concern and propose appropriate actions to improve professional relationships in the Lexington Public Schools.

The Study Process

The study process was organized and overseen in collaboration with a ten-person steering committee composed of five members of the Lexington Education Association and five members of the administrative staff.

Committee Members

Dr. Paul Ash, Superintendent of Schools

Andrew Baker, English Teacher, Lexington High School
Natalie Cohen, Principal, Lexington High School
Meg Colella, Principal, Bridge School
Diane Corbett, Special Education Teacher, Diamond Middle School
Larry David, Social Studies Teacher, Lexington High School
Dr. Steve Flynn, Principal, Clarke Middle School
David Lambert, Grade Four Teacher, Bridge School
Phyllis Neufeld, President of the Lexington Education Association
Carol Pilarski, Assistant Superintendent of Schools

The committee first met on September 13, 2011 to establish its working norms and to offer guidance on the process design. Over the time span running from September 20 to October 27, 2011, the project consultant, Bruce Wellman, spent a day at each school in the district and two at the high school to conduct focus group and private interviews, and to receive written correspondence with staff members from all employee categories. These included teachers from grades preK-12, secretaries, student support personnel, student support instructors, instructional assistants, custodians, technology support staff, principals, department heads and central office administrators, and the Lexington Education Association Executive Board.

In all, over 350 staff members participated in the process offering comments, insights and perceptions. This number represents participation by approximately one-third of the district's employees. Participants offered a wide variety of perspectives, ranging from employees who had worked in the district for a matter of weeks to others who have taught or worked in multiple districts. Staff members who grew up in Lexington, those who have worked their whole career in the district, and those who are parents and grandparents of Lexington graduates and /or current students offered additional viewpoints.

On November 14, 2011, the Steering Committee met to sort and classify all responses and generate categories to develop a shared picture of the varying perspectives and experiences reported by staff members. On December 19, 2011, the committee met to convert these categories into larger themes to create a firmer sense of the major issues that need attention at the district, programmatic, and school levels. On January 13, 25 and 26, 2012, Bruce Wellman and Dr. Ash met with principals individually to reflect on the data related to each site and develop action plans for addressing issues specific to each school's context. On January 31 and February 7, 2012, the Steering Committee met to respond to the draft report and offer suggestions and revisions.

This final report represents the significant ideas that emerged from this process. Please note that not all items mentioned by interviewees are addressed in this report. Issues and concerns regarding specific personnel have been shared with the appropriate department supervisors and actions steps are currently taking place. There are also some department issues that will be addressed in action plans. If you do not see your “comments” voiced in this report, please understand that the Steering Committee saw the full range of issues and will maintain oversight to make sure issues are addressed.

Context

One striking feature of the Lexington school district’s recent history has been the many changes in district and building leadership. For veteran teachers, this has meant working for and adjusting to numerous principals, superintendents and other central office personnel. Each leadership change brought style differences, shifting goals and ever-varying working relationships. At the same time, the national and state policy context was shifting with the advent of the No Child Left Behind legislation and increased external accountability measures. Research on effective teaching, including significant transformations in assessment practices that most influence student learning, has also come to the fore. In addition, research on the power of adult professional communities and the effects of adult interactions on improvements in student learning are expanding the notion of what it means to be a skillful teacher and skillful leader in these times.

Lexington and many districts, locally and nationally, with similar student demographics have in many cases operated as loosely coupled systems. High degrees of teacher autonomy and high degrees of school autonomy have often produced excellent overall results when students and parents are extremely motivated and supportive of learning processes and learning outcomes. Changing external environments and changing student needs challenge the continued effectiveness of this approach. Cultures of autonomy tend to flourish when there is persistent administrative turnover. Incoming administrators are often reluctant to proactively supervise teachers whom they do not yet know well, leaving some teachers without meaningful feedback on their performance for many years running. Some researchers describe the move from relatively autonomous schools to a systems approach as the difference between being a district of schools and being a school district. This more cohesive whole-systems approach is necessary to achieve the benefits of cumulative effects, especially when data need to be disaggregated to understand the performance issues for special education students, English language learners and minority students. It is here that Lexington has shown outstanding progress with its noteworthy results on last year’s MCAS scores topping other districts in the state in Grade 10 English

Language Arts with all students scoring at either the proficient or advanced level and displaying high levels of performance in all tested grades levels.

The Lexington school district attracts and recruits talented and hard working teachers, administrators and support staff. One outstanding characteristic of the district is the hiring, induction and mentoring process for new teachers. The district is building a quality staff as these recruits join their more experienced colleagues in the schools. With the pace of change and the demands of learning a difficult profession this can be especially stressful for many beginning teachers and more so in Lexington given the high standards and expectations from both administrators and the community.

A significant part of the deeper story in the district is told by the staff demographics. 61% of the teachers, 76% of central office and building administrators and 76% of the support staff have been employed in the district for ten years or less; 8% of teachers, 12% of central office and building administrators (note this 12% represents three individuals), and 8% of support staff have been employed by the district for more than twenty years (See Appendix A for the Seniority Chart showing demographic breakdowns). These numbers contain some significant relational and emotional implications. For at least one third of the teaching, support and administrative staff, the current culture and ways of operating are normal. For more veteran employees recent changes in program and practice are held in stark contrast to earlier stages of their careers and earlier eras of leadership. The middle experience level bands may have been the most affected by the revolving doors of leadership. Their career story has been one of constant change and shifting relationships.

Two characteristics stand out from these demographic stories. One is the frequently expressed high regard for colleagues that emerged during the interview and focus group process. One interpretation of this is that in schools and districts with steady leadership turnover, staff members come to rely more strongly on one another for support and guidance and less on administrators. The other significant characteristic is that the stories that emerged reveal two distinct time orientations among staff members. One pattern was perspectives that revealed a present-past time orientation and the other pattern was perspectives that revealed a present-future time orientation. Those with the present-past orientation frequently mentioned former principals and superintendents. As can be imagined, more veteran staff members operate with the present-past time orientation. It is worth noting that the administrators and many staff members operate with a present-future time orientation. Those with the present-future orientation spoke about the

need for goal clarity and their desires and need for time to integrate and apply new professional practices within their classrooms and teams.

Some veteran teachers expressed this tension in time orientation as a lack of respect by administrators for the history of programs and buildings and in some cases as feeling devalued for their beliefs about teaching and for past contributions to their schools and the district. There is equal frustration on the part of administrators and teachers who are supporting new models of instructional and collaborative practice and want to focus on the work of moving their schools forward.

One often-mentioned concern during the interview and focus group sessions was the perceived growth in the number of central office administrators. The data indicate that from the year 2005 to the year 2012 there has been an increase of 7.1% in administrative positions located in the central office representing an increase of one administrator (from 14 to 15). The corresponding increase for the teaching staff is 10.2% or an increase of 57.2 teaching positions. The student population has grown by 4.17% or an increase of 255 students. There seems to be some confusion about the number of middle managers added in the system. While there are now five department heads in the middle schools, there had previously been ten department chairs. There were nine Evaluation Team Leaders where now there are nine Evaluation Team Supervisors. The role of the Director of Performing Arts was split into two positions, as was the Director of Physical Education/Wellness.

The Change Process

Like many other school systems, the Lexington schools have been involved in significant change processes in recent years. Change is hard in most organizations and is particularly difficult in schools, which are bounded by tradition, calendar and time pressures, contract constraints and community expectations. This constellation of forces makes significant change especially problematic in traditionally high-performing districts where the case for change may not be obvious to all affected parties. High expectations to produce results for all learners and Lexington's drive to close the achievement gap between special education, English language learners, minority students and traditionally successful populations has come at a cost to staff relations and is pushing system capacities to their current limits.

Significant and stable improvements in student performance require not only changes in classroom practices but also changes in the working culture of teachers. The shift from a culture of autonomy to one of collaboration is embedded in the work of developing Professional Learning Communities in the Lexington schools. This work requires high degrees of data literacy

based on common assessments and other formative measures. The collaborative shift requires vulnerability on the part of teachers to share both their results and their teaching practices with others as well as collaborative and relational skills to get these important tasks accomplished. When this is all squeezed into already packed schedules, tensions rise, especially when teams have not fully developed the tools for collaboration and for talking together about “hard-to-talk-about” topics.

Change entails loss and potential value conflicts. Some losses include loss of confidence, loss of time, loss of status, and loss of the comfort of established practices for teachers, support staff members and administrators. This sense of loss requires thoughtful and humane change management processes. Given the complexity of school change, many things need to be changed simultaneously, requiring both top-down and bottom-up approaches to empower successful change processes. Curriculum, instructional practices, assessment practices, targeted interventions for students who need extra help, and a host of organizational patterns all require attention and energy. Changing one thing at a time takes too much time and is insufficient to reshape the culture deeply enough for new patterns to take hold in the organization.

Change leaders need to maintain open lines of communication to both offer an ongoing rationale for the changes and to provide coherent images of desired outcomes. There also needs to be ongoing feedback from those most affected by the changes to solicit input, advice and help with problem solving. There are many indications that this has not always been the case during recent change processes in the Lexington schools. Many staff members in a variety of roles report a sense of being either left out of the loop or not listened to when they offer feedback to central office and building administrators.

Teaching is a caring profession requiring active emotional labor (Hochschild, 1983). When teachers’ work is speeded up or intensified, teachers can be overwhelmed by change demands, experiencing feelings of guilt that they are harming those for whom they care (Hargreaves, 1994). During the focus group and interview process many teachers and especially special education teachers expressed such concerns. Expressions of loss centered on a sense that the district was losing the focus on the whole child and concerning itself with test scores, data and numbers. Given these pressures, principals have become the emotional middle managers of educational change (Blackmore, 1995). This management responsibility places additional demands on principals’ time, energy and emotional resources.

In the Lexington district, the various schools, departments and programs are at different stages of comfort and facility with the changes underway. Some of this connects to the natural learning

curve that comes with any change process and some is relational, given the varying tenures of the principals in their buildings and curriculum leaders in their departments

Significant organizational change takes time, tenacity, thoughtful leadership and caring relationships. The seminal work known as the Concerns-Based Adoption Model proposes that significant change in schools take 3-5 years of concerted effort to take hold and goes through predictable stages (Hord, Rutherford, Huling-Austin, & Hall, 1987). Change is a highly personal experience. Change advocates must pay attention to the perceptions and feelings of the people experiencing the change process. Personal satisfaction, frustration, concerns, motivations and perceptions play a large part in determining the success or failure of the innovation. The change process is not an undifferentiated continuum. Individuals move at different paces through the stages in their perceptions and feelings as well as in their skill and sophistication in using the innovation. And, when acquiring new skills, efficiency falls off. This latter factor may be contributing to Lexington employees' concerns about the pace and the amount of work they are trying to accomplish.

The Concerns-Based Adoption Model

Expression of Concern	Behavioral Indicators of Levels of Use
Levels of Use of the Innovation	
0. Awareness I am not concerned about it. What is it?	0. Non-Use The user has no interest, is taking no action.
1. Informational I would like to know more about it. How does it work?	1. Orientation The user is taking the initiative to learn more about the innovation.
2. Personal How will using it affect me? How does this impact me? What's my plan to do it?	2. Preparation The user has definite plans to begin using the innovation.
3. Management I seem to be spending all of my time getting materials ready. How can I master the skills and fit it all in?	3. Mechanical The user is making changes to better organize use of the innovation.
4. Consequence How is my use affecting learners? How do I	4b. Refinement The user is making changes to increase

refine it to have more impact? Is this worth it? Is it working?	outcomes. 4a. Routine The user is making few or no changes and has an established pattern of use.
5. Collaboration How can I relate what I am doing to what others are doing? It's working fine, but how do others do it?	5. Integration The user is making deliberate efforts to coordinate with others in using the innovation.
6. Refocusing I have some ideas about some things that will make this work even better. Is there anything else that's better?	6. Renewal The user is seeking more effective alternatives to the established use of the innovation.

In his book, *The Human Side of School Change*, organizational psychologist, Robert Evans offers a useful model for the tasks of change (Evans, p. 56).

The Tasks of Change

Task	Key Factors
Unfreezing (current practices)	Reducing the fear of trying something new Increasing the fear of not trying the new Creating psychological safety Managing anxiety and guilt
Moving from loss to commitment	Making the change meaningful Providing time Personal contact and interaction Continuity
Moving from old competence to new competence	Developing new behaviors, skills, beliefs and ways of thinking Training that is coherent, continuous and personal

Moving from confusion to coherence	Realigning structures, functions and roles Developing clarity regarding responsibility, authority and decision making
Moving from conflict to consensus	Generating broad support for the change Developing critical mass Applying positive pressure Applying positive uses of power

Overarching Themes

As the steering committee worked with the data, patterns became apparent resulting in three overarching themes that frame the rest of this report. These themes are: 1) A culture of high expectations 2) Collaborating for success 3) Leadership capacities. While each is presented here as a separate topic, they intertwine and influence one another in many ways. Cultural norms influence and are influenced in turn by collaborative practices and each of these is influenced by and influences leadership capacities. The following section will take each theme in turn by distilling and analyzing the information collected and offering recommendations for addressing essential concerns.

I. A Culture of High Expectations

Developing positive and productive cultures is an ongoing challenge for all organizations. Part of the difficulty is that key aspects of a culture's values and beliefs are not always visible to people within that culture. The way things work are not always recognized or discussed. Lexington's powerful culture of high achievement is the water everyone drinks, applying pressure in all directions to take on more, work harder and keep up with peers. Multiple goals lead to intense workloads with multiple meetings squeezed into ever-busy and ever-longer days. The mission to serve students and help them all to achieve at high levels is a constant push on teachers, support staff and administrators driving the system to the edge of its current capacities. A repeated theme within the interviews and focus groups among all school staff was the need to clarify what is mandatory and what is voluntary. Given the surrounding cultural pressures voluntary activities do not always feel voluntary and employees do not always feel they can say no. Some staff members commented that they feel conflicted when they are attracted to learning opportunities and committee work that are intriguing but don't see how they can squeeze in one more thing.

The knowledge and skills of Lexington's curricular and instructional support staff are simultaneously one of Lexington's strengths and a source of pressure on staff. Resource people and instructional leaders see and respond to needs within their fields, identifying areas to address in the curriculum, program adoptions, and instructional strategies. All of these good intentions lead to a sense of overload and fragmentation producing a constant scramble for staff members to keep up with all of the initiatives. While this is true for many staff members, it is especially so at the elementary level where generalist teachers are expected to be competent in multiple curricular fields.

Across the district culture, there is a need to clarify the difference between having standards and standardization. Some teachers report the loss of individuality and feeling pushed towards a single model of good instruction within a more constrained curriculum and higher levels of external accountability. Given the political and fiscal environment in the country and in the state, this will be an ongoing tension for teachers who learned to teach in a less prescriptive, more laissez faire era. The shift from a culture of high autonomy to one of high collaboration requires attention to relational skills with attention to treating difference of opinion with respect as goals and processes are clarified within schools and within the district.

Standards are shared images of both desired student outcomes and effective teaching practices. In an ideal model there are many ways to achieve a standard, allowing for teaching variety and personal approaches. What should not be negotiable and needs to be constantly clarified are the desired student outcomes and the qualities of effective teaching practices that produce those outcomes. Professional development, teacher collaborative work and supervisory practices then need to organize around these shared understandings of student learning and instructional practice. There were consistent reports that instructional assistants and student support instructors feel marginalized, without proper training. The secretaries and the technology department also reported needed more training, with opportunities for professional development. A related issue is confusion in some quarters about the purposes and processes of the various forms of student assessment being applied in the district. Some staff members couched this as being about data, with comments about doing data for data's sake, but in some cases, it appears to be a misunderstanding about the assessments that produce the data. Formative, summative, benchmark, and common assessments were all terms being used by teachers but not always in the same way or with a clear understanding of the differences in type or application to the learning process. A more sophisticated and shared assessment literacy will influence a more sophisticated approach to working with data.

While staff members support the vision of high success for all students, they do not support or appreciate the means by which changes are initiated, communicated and managed, expressing a need for greater clarity about why changes are being initiated, how these changes are communicated and how these changes are managed. There were frequent reports of feeling a top-down orientation from Dr. Ash and other central office administrators, as well as from middle managers, related to these concerns, which cuts across all employee groups. The lack of the “human touch” is a barrier to deeper engagement on the part of many staff members. These more affective qualities relate to reports by staff members of not having their ideas or perspectives valued and of a fear of speaking out. Some staff members feel that there has been retribution when they or others expressed opposing opinions to district administrators and supervisors. Some staff members declared that it is hard to assume positive intent under these conditions.

These climate and communication issues clearly express the need for attention to both the clarity of goals and to enhancing levels of trust in the organization as ongoing focuses of improvement efforts. It will be important to find the appropriate balance and applications of both top-down and bottom up processes. Each approach has its place in productive and effective organizational change processes. Neither approach is sufficient by itself.

Recommendations

1. To create a sense of the whole and answer the question, “Where are we going?” ---develop a cohesive graphic image of the desired state of the high performing district. The graphic should display goals, essential processes, interconnections and key points of interaction. Use the graphic to identify organizational and professional capacities that are needed to produce and sustain the desired state. These include, but are not limited to, high levels of assessment and data literacy, the collaborative skills to work with assessment results and modify instruction accordingly, mentoring skills and supervisory skills.
2. Clarify priorities to address issues of overload and fragmentation. Connect current initiatives to the change research to develop a clearer image of the state of each initiative. Identify initiatives that are district, school and teacher driven. Major efforts such as the work of professional learning communities, data teams, social-emotional programs, assessment, curriculum reviews, and literacy and numeracy instruction are all at different stages of the change process in different settings in the district. Each major initiative needs to be assessed and compared to the stages of change mentioned earlier in the report. Projects tend to stall out at the Stage 3 management level (noted in the table on page 8) if there are no detailed assessments of implementation practices and levels of use. These assessments need to measure both frequency of use of the new practices and the quality of implementation. These assessments should then be

used to target professional learning needs, to guide professional development decision-making and to focus mentoring and coaching efforts.

3. For all proposed new initiatives and program changes, create an “environmental impact statement” naming the change implications, ripple effects on current practices and the impacts of these on staff members.

4. To get a firmer handle on the issue of workload, develop impact case studies for selected teachers and staff members. Use time logs and schedules to track a typical day. Create a graphic with the selected staff members at the center and draw lines connecting to all the projects, initiatives and work processes that flow through their days. Use this information in concert with the identification of the stage of change related to current initiatives to frame the difficult conversation about reasonable workloads and the potential need to adjust the pace of change in the district and/or the number of initiatives in the system.

5. The district is ultimately faced with the dilemma of balancing time and tasks. Three approaches need to be considered to address this dilemma 1) Prioritize projects – the principle of first things first 2) Increase efficiency – work smarter not harder 3) Find more time – adjust the schedule, length of the work day and/or the calendar to match values and priorities.

II. Collaborating for Success

Concern about collaboration was a frequently named issue by teachers, support staff members and administrators during the interview and focus group process. Effective collaboration is embedded in what people talk about and how they talk to one another. Across roles, participants in the interview and focus group process mentioned an “us versus them” mentality. The sense is that people do not feel like they are in it together and that they lack shared ownership of goals, processes and procedures. This will require renewed efforts at building positive working relationships around the work of the district. Some staff members feel that there is a lack of trust in the district, and that more kindness and recognition are needed. Treating one another with respect and civility must be at the heart of this work.

The professional learning community process and the work of data teams are at varying stages of development across the district. Groups lack clear criteria for assessing team skills and clear goal setting processes to chart their growth as collaborative groups. There were several reports that team success was basically a luck-of-the-draw process. High functioning teams require a shared commitment to the work, clear goals for tasks and professional working relationships, a process toolkit and systems to assess group growth and development. Team members need to feel that their work together is authentic shared work and that they are not an ad hoc collection thrown together to fill out the schedule. This is especially true for specialists and special education

teachers, leading to the feeling that they are getting the “leftovers” and being stuck on teams with open slots and not with peers who have shared interests. Some teachers still perceive working with colleagues outside their classrooms as shifting away from their real work with students. However, in this changing climate, collaborative interaction is, in fact, as much a part of teachers’ work as is their time with students.

Time together does not produce productive groups. Time without tools is often unproductive and tools without time creates frustration. Groups and group members across all roles in the district need lenses for viewing their work to gain perspectives on the choices that they are making and skills they are applying as they work together. Skillful collaboration grows out of the choices people are making in the moment. Group development requires personal development. When and how individuals chose to participate emerges from individual and collective awareness and commitment to skill building. Seven qualities describe high-performing collaborative groups (Lipton & Wellman, 2012).

1. Maintain a clear focus. High performing groups clarify desired results and define success criteria for their work and for themselves as a group. In skillful groups, members monitor themselves and others to gauge whether contributions are adding or detracting from the group’s focus. Less productive groups meander from topic to topic, wandering through over-crowded agendas and often-unnecessary examples and stories.
2. Embrace a spirit of inquiry. High performing groups ask genuine questions about their own processes and practices as well as about their students’ learning. Group members are willing to suspend their own judgments and opinions as they consider other perspectives. By definition, inquiry means you do not have a preferred response or do not already know the answer. Less-productive groups avoid ambiguity, uncertainty, and challenging questions, wrapping themselves in the comfort of existing knowledge.
3. Put meaningful data at the center. High-performing groups use data to inform and guide group and student learning. These data focus and calibrate conversations. When group members are assessment literate they keep data central to the conversation, seeking out and using multiple sources and multiple types to inform their choices and plans. Less-productive groups blur fact and opinion, occupying time with anecdote and argument.
4. Honor commitments to learners and learning. High-performing groups keep learning as the focus of their conversations. They see themselves and all members as learners, and they are willing to consider the limits of their own knowledge. Less-productive groups stay within the boundaries of their current capabilities and are satisfied with merely meeting expectations, not exceeding them, both for themselves and for their students.

5. Cultivate relational trust. High-performing groups operate with high expectations and positive intentions as central assumptions. Within these groups, it is safe to display both high competence and vulnerability. High-performing groups rely on the integrity and competence of their colleagues inside and outside of the meeting room. When it is safe not to know, group members seek the counsel of their peers; they don't feel the need to hide their shortcomings (McLaughlin & Talbert, 2001). In less-productive groups, members fear attack or reprisal for things they might do or say, and they are filled with doubt, having little or no faith that their colleagues will honor decisions or follow through on agreements.

6. Seek equity. High-performing groups leave titles, seniority, and role authority at the door. On this level playing field, they seek a blend of voices and protect space for all to contribute. Skillful groups apply structures to ensure reciprocity, foster interdependence, and engage in productive collaboration. Less-productive groups limit participation and restrict divergent thought, sealing themselves in the protection of their own logic.

7. Assume collective responsibility. High-performing groups make and honor agreements about who they want to be as a group and what they want to produce for their students. They make data-driven choices and are willing to be answerable for those choices. This collective efficacy, or the shared belief that together the group will successfully achieve its goals, is a prime resource for sustained improvements in student learning (Goddard, Hoy, & Woolfolk Hoy, 2004). In less-productive groups, members are protective of their autonomy in the meeting room and in the classroom. They are unwilling to see others' work as part of their own.

These seven qualities are built upon a foundation of collaborative skills that need to be explicitly taught, practiced, monitored and assessed. Talking together about important and at times difficult topics is the most fundamental group process. How group members talk influences personal and collective thinking. How group members think influences personal and collective talking.

Productive group talk requires knowledge and skills for three modes of discourse: dialogue, discussion and decision-making. Group members need to know which form of discourse they are involved with at any given point in time so they know how to listen to and respond appropriately to others. These discourse forms build upon one another to first open thinking and then to focus on a course of action. Dialogue promotes a spirit of shared inquiry in the group by surfacing multiple perspectives and connection making. In dialogue there is no need to influence others or to agree. When groups move to discussion, they break issues and problems into component parts so they can analyze ideas and clarify the distinctions between ideas. In skillful discussion, group members critique, advocate, sort and prioritize. Discussion breaks down when group members default to unhealthy debate and get caught in win-lose battles that are more about ego than ideas. Decision-making is choice making. The intention is to weigh options against success criteria, select the most viable outcome, and set the scene for action planning. The need for clarity about

decision-making was a recurring theme in the interview and focus group process. This issue will be taken up in more detail in the leadership section of this report.

Collaboration is a practice as well as a value, requiring four essential group leader and group member skills. 1) Listening without judgment 2) Pausing to create a space for thinking 3) Paraphrasing to support relationship, increase understanding and shape thinking 4) Inquiring to open and focus thinking. Groups that practice these skills improve the quality of their work and the quality of their relationships.

One special area of concern is the quality of meetings in the district. There were numerous reports of both too many meetings and of poorly run meetings. This was especially so for special education teachers. There was a high level of complaint about special education department meetings. These appear to be poorly planned, poorly organized and poorly facilitated. Given the importance of this department within the district, there is a great need to enhance the quality and productivity of these meetings. Across the district, attention needs to be paid to developing clarity about meeting purposes, designs and processes. Facilitation skills for designing and running effective meetings are essential professional competencies that need to be developed as a core function in the district. These skills are vital for administrators, teacher leaders and key support staff leaders.

The working relationship between the Lexington Education Association and district and building administrators is a key arena for focusing improvement efforts in positive collaborative engagement. This will require both parties to step aside from the history of the relationship and take courageous steps forward to develop productive working agreements in a spirit of caring, respect and mutual problem solving.

There is currently a gulf between how the related parties perceive their working relationship. LEA leaders speak to the need for more partnership with district leaders in which they are able to differ and work collaboratively through difficult conversations to resolve issues as easily and quickly as possible. While administrators do not disagree with these goals, they view the LEA as being unnecessarily confrontational and obstructionist which they believe blocks forward movement in the district. Each party has important responsibilities in the relationship for balancing the best interests of students with the contractual rights of employees. The spirit of these interactions may be as important as the ways in which the parties interact.

Recommendations

1. Collaboration is a skill set that cannot be assumed all administrators and staff members possess. The sometimes-messy process of working together in new ways takes time, explicit teaching, monitoring and assessing. There is a need to clarify the expectations and skill sets required in critical work settings in the district and develop targeted training in the skills of collaboration. This process was begun through the meetings with principals held with Dr. Ash and Mr. Wellman and will be shared with staff at their next faculty meeting. As mentioned above, one essential need is to develop clear criteria for assessing team skills. All parties need to be accountable for applying these skills in these settings and reinforcing peer-to-peer accountability for group processes and task success. For supervisors, there is a need for skill building to know when and how to intervene with low performing groups.
2. Develop the meeting design and facilitation skills of administrators, key department supervisors and teacher leaders. Well-run meetings are very similar to well-crafted classroom lessons. They require clear outcomes, a process agenda and the facilitation skills to encourage full engagement to support participants in processing information and managing effective decisions. Groups need a shared repertoire of meeting tools, clear understanding of meeting roles and when groups are large, skillful facilitation.
3. Administrators and staff members need skills and tools for managing difficult conversations and working confidently with conflict. Conflict is an essential part of the collaborative process. The key distinction is between cognitive conflict and affective conflict. Cognitive conflict produces better thinking and better products. Affective or interpersonal conflict damages both relationships and the work. One targeted intervention would be to have key administrators and key members of the Lexington Education Association leadership group participate in joint training and learning about how to engage in difficult conversations. This would include skills for one-to-one conversations and conversations in small groups. This could then be expanded into training all employees.
4. Jointly identify key terms that need to be clarified to organize a productive working relationship between the LEA and administrative team. Some key terms include: partnership, collaboration, rights and responsibilities. These essential terms need to mean the same thing to both parties and there is a profound need for agreement about how these concepts translate into daily actions.
5. Clarify the working relationship between principals and special education administrators. This would include clarity about roles, responsibilities processes related to essential decisions about student services with particular emphasis on exploring ways to make more timely and efficient decisions.

III. Leadership Capacities

Leading schools is hard and demanding work. This is especially so in Lexington, given the culture of high achievement and high expectations for results. Meeting the ever-shifting needs of students, parents and teachers requires constant attention to details and relationships. As noted above in the section on change, leading change is important work. This requires careful framing of outcomes and processes with ongoing attention to listening to employee concerns. Staff members need to understand the reasons for proposals and actions and be reminded of the connections to the big picture. Having realistic expectations for the change process that teachers and other staff members are going through and providing appropriate support systems for on-the-job learning, including technology related issues and software applications are important leadership responsibilities. These issues relate to the earlier information in the “Collaborating for Success” section on pages 11 and 12 about workload and clarifying priorities.

There was a need expressed in focus groups and interviews for Dr. Ash to be more visible in the buildings. It is believed that his presence is required in order to see the impact of system and building initiatives/goals on the ground level, as well as get to know staff and be known-the human touch discussed previously in this report.

Given the many initiatives, program changes and ongoing committees and teams, there is a need to expand the definition of leadership in the district and embrace new forms of distributive leadership in which teachers are encouraged and supported in their efforts to step up and take the lead on projects. This peer leadership operates from a stance of influence not power. It also means taking risks and developing new relationships with colleagues. Being a master teacher does not make one a master adult group leader. Leading peers requires skill sets for developing and facilitating collaborative groups. This skill set includes knowledge of adult and group development, knowledge of problem finding and problem solving skills, fluency with a variety of planning tools and knowledge and skill for facilitating productive groups. The latter includes knowing when and how to intervene when groups get off course.

Decision-making clarity was an area of concern that emerged throughout the interview and focus group process among all groups. This needs to be revisited frequently in most settings. It is almost impossible to be too clear about decision-making processes in organizations. The what, why and how of decisions and the underlying reasons for actions need to be communicated clearly

Staff members within the special education department frequently mentioned decision-making as a problem area. Special education issues and concerns emerged as a dominant theme in the focus groups and interview interactions. The data gathered indicates a need for more organization, clearer processes and follow through on the part of managers of the department. One complicating factor is that judgments about proposed student services are not grounded in clear and shared criteria among the various staff members who serve students and participate in team meetings. The lack of shared criteria leads to distorted processes and staff members who feel their expertise is undercut, resulting in a lack of confidence in final decisions and a lack of respect for department leadership and department processes. There is also a sense that student placement issues are being based on financial consideration not student needs. Lastly, the effect of the instructional aide layoffs due to budgetary constraints affected morale, both from the members of that unit and also classroom teachers who experienced the impact. The complicating factor was that avoiding these layoffs would have resulted in the reduction or elimination of other positions.

This decision-making issue has also led to certain tensions between the staff and members of the finance department. There appears to be a disconnect between management functions and the impact on teaching and learning. Ordering processes take too long in some cases. Secretaries sometimes feel they are treated harshly when errors occur, not as part of a teaching and learning process. The staff morale in this office needs some improvement.

To address the complex issue of decision-making there needs to be clarity about the many forms this can take. There are six common decision-making methods (Schein 1999).

1. Decision by default. This often unlabeled method occurs when a group member suggests an idea and before that proposal is examined another member proposes a different idea creating a random stack of ideas until the group selects one for action. In this circumstance, silence equals consent. To avoid decision by default, groups need to be clear about when they are at the point of decision-making and choose specific processes for doing so.
2. Decision by self-authorization. Self-empowered individuals or coalitions within a group or organization can push their agendas for action without regard for a sense of others. There is a need to check with silent group members to see if there is accord with the proposal. There needs to be time for deliberation, inquiry and generating alternative courses of action.
3. Decision by external authority. There are times when a group is not authorized to make a decision and someone outside the group is the ultimate decider. In this case, the group's responsibility is to craft a recommendation and influence those with decision-making authority. When lines of authority are fuzzy, groups invest time, energy and emotion honing a decision that

outside agents may reject or modify. To avoid this problem, groups and organizational leaders need to be clear about roles in the decision-making process.

4. Decision by majority vote. This common method occurs in either of two forms. In the first, an informal poll is taken to get a sense of the group related to an issue. In the second, someone makes a formal motion and puts the decision choices up for a vote. The liability for collaborative groups and organization striving to build collaborative cultures is that voting creates a win/lose situation. This can be offset by a decision rule that establishes a super majority as a condition for reaching agreement. Typically this number is set at 75 per cent of the full group.

5. Decision by consensus. Consensus requires sufficient time and structure for hearing all viewpoints. Consensus means that while all group members may not fully agree with a course of action, they are willing to move forward with a proposal and support it with integrity. To work successfully with consensus, group members need to develop and refine their discourse skills so that all perspectives are available to the group as it works through the issue at hand.

6. Decision by unanimous consent. A common misconception is that complete agreement and commitment by all is the ideal. As groups develop, they discover that this method does not always make the best use of time or energy. Unanimous consent requires very high levels of discourse skill, fluency with shared structures and processes and often an external facilitator to manage those processes.

Leaders of productive decision-making groups pay attention to the following four factors:

- They name and structure one mode of discourse at a time and mark clear transitions as they move from dialogue to discussion to decision.
- They name the boundaries – what is negotiable and what is nonnegotiable in processes and outcomes.
- They name decision-making roles and responsibilities.
- They name who will be most affected by the decision, and keep those people mentally and emotionally in the room.

Recommendations

1. Review and clarify essential understandings about decision-making processes and the differing levels of participation in decisions. The ultimate questions are, “Who decides?” and “What process will we be using?” These processes need to be communicated clearly to develop common understandings of ways to participate appropriately. One important aspect of successful decision-making is to include the voices and input of those parties most affected by the potential decision.

2. Support district leaders in developing group leadership skills for framing tasks and decisions. These include design and delivery skills for naming the core purposes or the ‘whys’ of projects and initiatives, naming essential tasks and relational outcomes that will be achieved by successful project completion, clarifying the boundaries or nonnegotiable elements related to the project and naming the benefits that will result for project participants.
3. Expand opportunities to develop leadership skills by all staff members. These include leadership of committees, professional learning communities, work teams and adult learning groups. Essential knowledge includes knowledge of adult learning, group development, presentation skills and facilitation skills.
4. Collaboratively develop clear decision-making criteria for special education student programming decisions. These need to be tested against legal requirements and the knowledge-base on current best practices in the related specialty areas. Staff will then need to learn to collaboratively apply these criteria to test cases as a means of developing the process skills for managing these important decisions.

CONCLUSION: The Road Ahead

The way forward for the Lexington Public Schools will not always be easy. Progress will require long-term efforts over the next several years fueled by goodwill, optimism and many small victories. Compassion and patience for one another will be essential during the learning and growth process for all involved. No one person or group can manage this alone. A final recommendation is to establish a planning and monitoring team to review the recommendations in this report and develop both short-term and long-term goals for improvement. Key to these efforts will be defining the metrics for success and monitoring these on a regular basis. It is my hope that the school committee and community will respect these efforts and rally around the staff and administration to support the hard work ahead.

Bruce Wellman, Co-Director, MiraVia LLC, March 13, 2012

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Appendix A

Lexington Public Schools Seniority Chart

Years of Service All Categories of Employees

Category	0-3 years	4-10 years	11-15 years	16-20 years	21-24 years	25+ years
Professional Staff Unit A	21% n=142	40% n=264	19% n=128	11% n= 75	3% n=22	5% n=30
Central Office & Principals	24% n=6	52% n=13	12% n=3	0%	4% n=1	8% n=2
All Other Administrators	43% n=13	30% n=9	10% n=3	7% n=2	0%	10% n=3
Support Staff Unit C & D	43% n=163	33% n=125	12% n=46	4% n=15	3% n=10	5% n=19

**Lexington Public Schools
All Categories
Years of Service**

