Engaging Thought Leaders: An Interview with Bruce Wellman and Laura Lipton

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Bruce Wellman is an award-winning author whose work has been honoured by the Education Writers Association and was the recipient of Learning Forward's Staff Development Book of the Year in 1999 for The Adaptive School: A Sourcebook for Developing Collaborative Groups (Christopher-Gordon Publishers, 2008, 2nd ed.) with Robert Garmston.

Laura Lipton facilitates organizational adaptivity and learning through training and development in data-driven dialogue, group development, action research, and learning-focused collaboration. Lipton has authored and co-authored numerous publications related to organizational and professional development, learning-focused schools, and literacy development.

Learning Forward: What insights would you offer to those who facilitate teams in order to ensure that professional learning (that leads to changes in practice) occurs?

Wellman: How do you *transfer to practice*? One of the big answers here is the issue of **clarity of purpose.** A lot of groups flounder because they are not clear why they are in the room. So it's important to be clear about and share the purpose for being there.

How do you change people's really fundamental deep-entrenched ways of being with kids? Whether it is in Ontario or Virginia, we need to find ways to get people to talk differently, to have **different norms of discourse** around texts or mathematics, etc.

Also, there is not enough **backwards mapping**. What tends to happen is a lot of professional development is front-loaded information but we haven't thought about what it is going to take for people to transfer the learning into their own practice. The data around this is ferociously clear - people have to have lots of application time, lots of concrete model building, and also coaching at the site of application.

Finally, in our plan for implementation, we also have to **plan for desisting**. What are we asking people to stop doing? We think about the 'starts' but we don't think about the 'stops'.

So we need to be clear about why we are doing this, find ways to get people to talk differently, show people what it looks like through vivid exemplars of good practice, and consider what to stop doing.

Lipton: I would add that we need to think about *changes in practice* on two levels. In addition to changes in practice in the school instructionally, we also have to consider changes in practice in the group - in the work session for adults because changes in practice *there* increase the

likelihood of commitment to more enduring implementation and learning from that implementation. Establishing new patterns for the ways groups work so that they are more productive and allowing discourse that lets somebody be able to say 'no' in the room are both important. If we can't say 'no' in the room, then we get lip service and **lip service is absolutely the death of commitment.** So how do we work groups that are confident enough to grapple with issues, engage in cognitive conflict, disagree, advocate, and inquire into each other's thinking? If we can do this, then ultimately when a decision is made or a practice or plan is put into place, the commitment to that plan is genuine.

Wellman: The point I would add too is **clarity about decision-making processes:** What are the decisions? Who's making them? And for any working group, what is their role within that decision-making? A lot of morale problems end up being because of either bad decision-making or poorly structured decisions. The common complaint is that *they* (whoever *they* are) made this decision and we are just out of it. *They* are thinking about my classroom but I didn't get a voice. So it may be that, yes, we are adopting this new practice, these new programs and there is still decision-making at the classroom level (pace of implementation, adaptations to grade level, starting points, etc.) but when the decision-making process is not clear enough people will either mutate or rebel.

Learning Forward: Your work recognizes the importance of balancing participation of group members and producing a safe forum for participants to contribute ideas and raise questions. What actions can facilitators and learning leaders take to have/establish this kind of environment?

Wellman: How do we create psychological safety? The ultimate definition of psychological safety is it has to be safe enough not to know and it has to be safe enough to reveal my not knowing. For us it is actually all about structuring for purposeful interaction. How do you structure for participation and not just give lip service to it? There are some distortions about balanced participation which means we have to all go around the table and everyone has to have a voice. Some people are not comfortable in that forum so we are big advocates for subdividing groups. Whether it is a group of 8 or 80, we encourage lots of paired work. One way that makes this safe is the use of patterns – for example: think, pair, share patterns. We suggest think, write, pair and share, and then sometimes we'll go from pairs to paired square so now there is a quartet that can synthesize the ideas. These structures generate into widening synthesis. Making charts also provides access to lots of people's thinking so it is an important piece of process design that is critical. In addition, pairing people helps to create psychological safety. If I'm sitting with a group of ten I am not likely to say, "I feel really stupid at this point. I do not understand what you are talking about" particularly if it is something that we are already supposed to know because we have been talking about it for six months.

Lipton: So if categorically what we are talking about is group size, we need to consider the composition (who is in that group), how long the group stays together (to do what), and the group's patterns of interaction and engagement.

When we think about process, it is the marriage of structures and protocols. Protocols are clear guidelines, steps to follow towards some end or some task. Marry these with structures, meaning how many people are engaged with that protocol at a particular time, for how long and so on, and together those create a process that does the things that you are naming, balances participation, and increases the confidence to know I will have a voice. I don't need to interrupt if I know that I'm going to have a voice. I can breathe. We work in groups where people don't breathe because as soon as you breathe someone grabs the conversation topic and runs the other way with it. Paying attention to process through the use of protocols and structures, creates clarity about my opportunity to participate which doesn't mean, as Bruce Wellman said, going around and everyone has to say something, but I have that opportunity and I know I have that opportunity. I know I am protected from attack as well.

Wellman: Part of it also is incumbent on leaders to not pack the agenda so much that there is not time for genuine participation, particularly if the group needs ownership of the ideas. It is having a **tolerance for the full process** and for processing styles as well because people need to participate if they are going to do something with the information. We have to, as group leaders, be open to the fact that as clear as we thought we were, people may not be as clear so until they check for understanding – go deep or in many cases start to generate applications themselves, you don't know how well presented the information was. People may have rich notes and you think that as a presenter this is a fabulous workshop. They are all attuned; they are taking notes, but until we get to the field of practice we don't know and I think that is where we start to get questions.

Learning Forward: What are some obstacles to implementing group strategies?

There are a couple obstacles to implementing good group structures. Number one (that I mentioned earlier) is that people do not clarify purpose. You must always go back to consider the purpose. Another thing to consider is the strategies selected. Does the strategy fit the purpose of this group's work? Does the strategy fit the group's skill set? Sometimes we will see people try to do too complex a strategy and the group isn't developmentally ready. For example, the strategy may be one that surfaces conflict but the group is afraid of conflict. They never had reality conflict before and so we try a strategy that is supposed to bring that all up and people just freak out.

Lipton: A way to think about that is to consider if the strategy is well scaffolded. It goes back to the previous ideas too about safety. So how do we scaffold it? If it is a group that hasn't had

much experience with conflict for example, we certainly want to keep the group small and the initial conversation small. Another scaffold would be to structurally write down all the pros and cons about 'this' and then compare my pros and cons to one other person and then compare our pros and cons to just two other people. What you are doing is widening the circle and the perspectives but in a way that is safe. Whereas other groups that have skilfulness relationally in terms of that you wouldn't necessarily need that kind of a scaffold.

Wellman: When introducing strategies, give not just the 'what' and the 'how' but also the 'why'. We call that describing what, why, and how and the why means why this strategy with this content at this time for this group. So what is the group going to get out of doing this? This is particularly important for a high-task people, who do not want to interact with people. The ones who think (or say) "What do you mean, talk to my neighbours? Just give me the information and I'll go back to my classroom. Why? What is the payoff for that?" So *why* are we are going to do this text-rendering kind of protocol? What's in it for us? I'm going to work with a partner and I don't know this partner. Why are we going to work with strangers or someone from another grade level or secondary teachers? Why another department? Why have you chosen this for this work for our work?

Lipton: Share the benefits, outcomes, and expectations of a particular task.

Wellman: Groups develop over time and so again in term of this scaffolding, there is scaffolding of this discrete task but there is also having a developmental lens for building the group's toolkit so that groups realize they have a toolkit and that we increase appropriately the complexity of that toolkit.

Learning Forward: What is one thing you would like all professional developers to know and be able to do?

Lipton: To have confidence that they can influence adult learners; to understand that groups are not static and that they can make a difference in those groups. I think that the efficacy piece comes first – before the skill set and the strategy set for doing it. Professional developers must believe that groups can be developed and that they really do influence that development. They need to have the confidence to ask groups to do something that might cause the group discomfort or cause the leader discomfort towards the greater good of making work sessions and meetings developmental and cumulative and not just episodic.

Wellman: It is being able to operate in the moment over time - meaning seeing the group as it might be – not as it is because when leaders get stuck, groups get stuck. **You can't lead where you won't go**. It is the power and importance of modelling so leaders have to be willing to proactively model risk-taking sometimes, to model any kinds of patterns of inquiry that you

might want to model being a learner. We worked a couple of years ago with a principal in British Columbia which just disarmed his staff. He was new to the school in his first principalship. He said, "You know I have never been a high school principal. Would anybody be morally offended if I got skilful at this job? I want to start with learning how to run a good staff meeting. Would that offend anybody if we had good staff meetings?" He just kept checking. He said, "I would like a couple of people to help me and be my coaches and co-planners. He took it on himself so the staff could kind of help him shape the design and then he had permission to say "How did I do today?" for awhile rather than saying, "How did you do today?" He just jumped right in and became almost like the official risk-taker in this space as well.

Lipton: Which is another kind of modelling: the willingness to model making a mistake, not being 100% percent knowledgeable or accurate or perfect.

Wellman: And checking, checking, checking. We talk about checking for understanding in the classroom. How powerful. It is formative assessment so the last piece we might say is important for leaders to know is what would you want to see? What would you want to hear and how would you check the dipstick for that as the groups emerge?

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Laura Lipton and Bruce Wellman are co-directors of MiraVia, a publishing and professional development company specializing in products, publications and seminars that provide effective strategies, practical resources and innovative ideas for learning-focused teachers, mentors, instructional coaches, and school leaders.
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