**AES Program Reflection Discussion Facilitation Guide (Unit Leaders)**

This resource has been developed to help provide structure to, and guidance for, facilitating the primary unit team discussion(s) at the core of the AES Program Reflection process. This resource is, as indicated, intended to be a guide; it is neither exhaustive nor prescriptive. This resource provides a base for the discussions, but unit team leaders should feel free to adapt as needed for their teams.

**Prior to Unit Team Discussion** (*Approx. Total Time: 45 minutes*)

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| **Component** | **Items** | **Notes** | **Approximate Time Needed** |
| *Prep Work for Team Discussion* | * Share with your unit team the first section of the AES PR Template document (that has the summary of the unit mission, goals, major activities, and data sources to be consulted)
* Share with your team the data/information you identified to review (*which should be listed in the first section of the AES PR Template document*) and the guidance document for individual reflection
* Share with your team the SWOT Analysis document and ask them to reflect on the guiding questions prior to discussion
 | You may need to briefly explain to your team what the pre-work is and how you’ll be using it.Be sure that your team comes prepared to the team discussion with their notes from the prep work (*you may need to send a reminder*). | 30 minutes (*for facilitator to share appropriate resources and explain the core task)* |
| *Assign Roles for Team Discussion(s)* | * Facilitator – This role should ideally be filled by the unit team leader, but the unit leader may want to have a co-leader or assign someone else to facilitate the discussion
* Time-keeper – Assign someone on your team to be time-keeper for your discussion(s); this should not be the facilitator
* Note-taker(s) - Assign someone on your team to take notes during the team’s discussion(s) as the unit leader will later use these notes. You may want to assign more than one person to this role; this should not be the facilitator, but the facilitator may take their own notes as well
 | Be sure to assign these roles prior to the team’s discussion(s) so that everyone knows their roles and expectations beforehand. | 5 minutes |
| *Setting the Stage/Setting Norms* | * As the facilitator, part of your job will be to create a space where your team can have an honest, open, and productive discussion(s). In order to do that you’ll want to decide on what approach you want to take. A few options:
	+ Setting the stage – prior to the team discussion you may want to develop a few bullets points that you’ll speak to at the beginning of the team discussion; the bullet points could include your hopes for the discussion, what kind of discussion you want to have, etc.
	+ Setting Norms - setting norms or ground rules for a conversation can be a helpful way of starting with a shared understanding. If you determine that you’d like to set norms with your team, keep in mind that this should be done with your team at the beginning of your discussion; however, you may want to come prepared with a few potential norms/rules to use.
 | For some ideas for potential norms or shared agreements that might be helpful for your team discussion(s), see this link: <https://www.schoolreforminitiative.org/download/community-agreements/> | 10 minutes |

**Unit Team Discussion(s)** (*Approx. Total Time: 2.5 hours*)

There are 3 main aspects of the unit team’s discussion: the assessment of unit’s activities; the SWOT Analysis; and brainstorming ideas for Actions/activities moving forward. The table below presents some guidance for facilitating each aspects of the unit team’s discussions.

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| --- | --- | --- | --- | --- |
| **Discussion Aspect** | **Facilitation Steps** | **Notes** | **Materials Needed** | **Approximate Time Needed** |
| Setting the Stage/Setting Norms | * Facilitator either set the stage for how they want the discussion to go and their hopes **or** lead the team in developing shared norms
* If doing the latter:
	+ be sure to give the team time to propose norms/agreements before sharing ones you’ve thought of
	+ Once a few minutes have passed, ask team if they’d like to make any amendments, omissions, or additions.
	+ Once done, ask everyone to vote on whether they agree to the norms
 | If there is not consensus on norms at first, ask for amendments until everyone is comfortableOnce norms have been determined have them visible somewhere or make sure everyone has them to reference | Facilitator talking points for setting the stage **or** beginning set of norms | 15 Minutes |
| Assessment of Unit Activities | **Observations (What) -** 15-20 minutes*In this part of the discussion the facilitator will be asking the team to simply state facts re: annual reports and other data they reviewed. The objective here is to lay on the table where the unit currently is,* ***NOT*** *why; that will be teased out in the next section.*Guiding Questions:* Which major activities did our unit successfully accomplish?
* Which major activities did our unit partly or did not accomplish?
* What were the results of our major activities?
* What did you notice about our unit’s data? What did you notice about our ILO data (if applicable)?
* Were there targets that we met or did not meet? What were they?

*After the brief discussion share back with the facilitator or note-taker should share back out with the team a brief summary of what facts were captured. Ask the group if it’s accurate; if not, amend what needs to be***Interpretations (Why) -** 30 minutes*In this part of the discussion the facilitator will be asking the team to dig deeper into the “why” of your unit’s current results. This is the opportunity for the team to provide their assessment of what they think may have helped or hindered the unit’s progress.* Guiding Questions:*For the activities that were accomplished** Why do you think our unit was able to accomplish these activities?
* What was the impact of us accomplishing these activities?
* Which of these activities seemed high-leverage (had the most promising results/impact on our goals)?
* Which of these activities seemed least high-leverage (had minimal impact on our goals)?

*For the activities that were not accomplished** Why do you think we did not accomplish these activities?
* Are there things we could/should have done differently to accomplish these activities?
* Which of these activities, if we worked to accomplish it, would have the greatest impact on achieving our goals?

*Overall** Which of the activities we accomplished had the greatest impact on helping us move closer to achieving our goals? Why?
* Which of the goals we did not accomplish poses the greatest barrier to achieving our goals? Why?
* Does our data tell us that we’re on track to achieving our goals? Why or why not?
* Do the results of our activities tell us that our unit is as impactful as we could be? Why or why not?
 | During the Observations part, the facilitator will need to fight the team’s urge to start interpreting the “why”. If this happens, make sure to re-center the team by stating this part is just for laying out the facts.For the “interpretations” section, be sure that the team discusses at least one guiding question under each of the 3 sub-categories.  | All should have copies of data and annual reports that were shared prior to discussion | 45-50 minutes |
| SWOT Analysis | Set-Up: 5 minutes* Facilitator may want to start by reading the beginning paragraph of that document, which explains what a SWOT analysis is. Explain the primary focus of each component (*which is found in the table in the document*)
* Facilitator should explain that they will lead the team in a SWOT analysis discussion, one component at a time, and then they will summarize, refine, and prioritize their SWOT.
* Facilitator should either briefly re-state their talking points from the start of the discussion **or** remind the team of their agreed upon norms

Discussion: 20-25 minutes* Facilitator should use the guiding questions in SWOT Analysis Guidance document to lead discussion.
* Allot approximately 5 minutes for unit team to share thoughts for each component.
* At the end of the formal discussion on each component, ask the team for any final SWOT items that they would like to add.

Prioritization (*if needed*): 10 minutes* At this point, your unit may have a laundry list of strengths, weaknesses, opportunities, or threats.
* For whichever components seem to have the longest list of items, use the guiding questions on the second page of the guidance document to get the team to prioritize. (*note: this need not necessarily be done for each component*)

*After this discussion, the facilitator or note-taker should summarize what the team came up with for strengths, weaknesses, opportunities, and threats.* | Timekeeper should keep extra close attention to time, during this component.Note-taker should use the Matrix in the guidance document to capture notes from discussion | Facilitator will need the “SWOT Analysis Guidance” document. | 30-40 minutes |
| Ideas for Activities | For this part of the discussion, Facilitator should:* Remind the team that prior to having the team discussion, they were all asked to come prepared with some ideas for activities, based on their reflections
* Inform the team that as they prepare to discuss those ideas, they should now be thinking about all ideas in the context of what you’ve discussed previously, especially the unit’s SWOTs
* Let the team know that this is idea generation time, but it does not necessarily mean that this will be the final list.

Brainstorm: 10-15 minutesSolicit ideas from the team based on the following categories:1. High-leverage activities that the unit should continue doing
2. Potentially new high-leverage activities that the unit should consider adding
3. Activities that the unit should consider discontinuing (because they are either minimally impactful or may be too difficult to execute)

Discussion: 15 minutesAfter the brainstorming session, open a discussion to help refine your potential list of activities. Some potential guiding questions:* Which of these activities provide the greatest opportunity for our unit to leverage our strengths, or strengthen our weaknesses?
* Which of these activities will allow us to leverage specific opportunities we identified in our SWOT analysis?
* Which of these activities do you think will help us achieve progress on our goals the soonest?
 | For the 3rd category “activities to discontinue” the tendency will be do overlook or shortchange this aspect, but remember that it is equally important for the team to consider if there are activities that may no longer be worth the invest of time/effort; this will create room for other potentially more impactful activities. | All team members should have their pre-work notes available (which should include their ideas) | 25-30 minutes |
| Closing | Facilitator should wrap up the session by:* Thanking everyone for their prep-work and participation
* Thanking the team members who took on additional roles for the team discussion
* Asking for a few team members to share their reflections of the experience
* Sharing the next steps in the AES Program Reflection process and how/when the team will be involved
 | For the sharing of reflections of the experience, be sure to give enough wait time for team members to process and share, if they like. | N/A | 15 minutes |

**Considerations for Unit Team Discussion**

* The approximate time allotment for the team discussion outlined above is optimal for teams with 5-10 members; if your team is smaller you may need slightly less time.
	+ If your team is larger consider allotting at least an additional 10-15 minutes to the assessment of unit activities, SWOT Analysis, and Ideas for activities sections.
* You can decide if you want to have one team meeting discussion or 2 different discussions (the latter would normally occur for scheduling reasons)
	+ If you decide on the latter, it might be best to do the assessment of unit activities in one meeting and then the SWOT analysis and ideas for activities section, in the other meeting. Try to hold the 2 different discussions within a few days of each other, so that the team doesn’t forget too much in between discussions.
* This facilitation guide does not have breaks built in; the facilitator should determine the appropriate places and times for the team to have breaks, if needed.
* As a way of closing the loop, and honoring the unit team’s time and efforts, it is helpful to share a summary of notes back out to the team after the discussion(s).