



Family Engagement Leadership Institute

Action Team Toolbox

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Executive Summary

This Executive Summary provides a brief description for each section of this document.

- **What is an Action Team?** It is a demographically representative group of families and staff, all of whom are interested in building trust with one another and working together to: (1) determine strengths & challenges of current family engagement strategies, (2) design and implement a few safe-to-fail experiments that build off existing family engagement efforts, and (3) support the design of a new family engagement strategy for the following year. Action Teams can take on a formal structure (like a committee) or a more informal structure (like ongoing casual conversations with a consistent group).
- **What are the Action Planning Pathways?** They are designed to help you consider the various approaches you can take in launching and facilitating your Action Team. Your coach will work with you to consider options and pick the pathway that best aligns with your needs and priorities. The three pathways are: 1) “Build Anew” Pathway (create a new team), 2) “Build Upon”

Pathway (start from an existing team), and 3) “Build Your Own” Pathway (a customized approach).

- **What does the work of an Action Team look like?** In the fall you will focus on recruiting a team, building relationships, identifying strengths/challenges, and designing a few safe-to-fail experiments. You’ll document your progress by working with your coach to complete an Action Plan by winter break. Throughout the winter you will focus on implementing safe-to-fail experiments with your team, and will share an updated Action Plan by spring break. In the spring you and your team will develop a family engagement strategy for the next school year, and you’ll share it by the close of the Institute in May.
- **What is in the Appendices?** You will find sample agendas and conversation starters to help you get started with your Action Team, as well as additional guidance regarding safe-to-fail experiments.

What is an Action Team?

The purpose of an Action Team is to offer a place for shared learning through collaborative action. Action Teams are more like an action-research team or a professional learning community (PLC) than a traditional advisory committee. Given that the focus of this Action Team is on family engagement, it should also function as a conduit for the broader voices of the school community.

While you may have large-scale goals for family engagement in your community, the Action Team is primarily meant to work through short-term goals, especially as it begins its work. We suggest a bias toward action and time for ample time for reflection on what people are learning as they try new things.

An Action Team should be a demographically representative group of equal parts families and staff, all of whom are interested in building trust with one another and working together to:

1. Determine strengths/challenges of current family engagement strategies
2. Design and implement a few safe-to-fail experiments that build off existing family engagement efforts
3. Support the design of a new family engagement strategy for the following year based on the learning from this year

Action Teams can have a formal structure – with scheduled meetings in a specific space over the course of the school year – or be more informal, as long as they involve families and staff engaging in collaborative action. An example of an informal approach might be that there are three or four parents that you consistently see at drop off time in the morning. During those times, you and staff on the Action Team can check in with those parents on a regular basis. As long as you’re building relationships, having conversations about strengths and challenges, and collaboratively designing ideas for action – you’ve got an Action Team! Another possibility is that

there are 2-3 families that you can make monthly calls to. No matter whether you use a formal meeting structure or rely on consistent informal conversations with families and staff, the important thing is that both family and staff voices are represented, and that folks are working together to think about strengths, challenges, and ways to improve family engagement in your community.

What are the Action Planning Pathways?

The three Pathways are meant to help you decide which approach to take with your Action Team. Much of the work is similar once you get going, but every leader begins the Institute at a different starting point. Some already have existing relationships and committees that can be leveraged to start an Action Team. Others may be new to their school, or would prefer to start with building new relationships, or just simply want to create a new team. Still others are somewhere in between. To support each leader in moving at their own pace toward launching their Action Teams, we have designed three different Action Planning Pathways:

- **“Build Anew” Pathway** — for leaders who are building a new structure for their Action Team.
- **“Build Upon” Pathway** — for leaders who are building upon existing structures for their Action Team.
- **“Build Your Own” Pathway** — for leaders who want to create a customized approach.

You will work together with your coach during your first 1:1 coaching session to discuss which pathway is best for you. See detailed graphics of each pathway below. You can also see them in larger text in our stand-alone [Pathways Doc](#).

Summary of the Action Planning Pathways

Fall 2023

Share your Action Plan by Winter Break

Winter 2023/2024

Share updated Action Plan by Spring Break

Spring 2024

Share Integration & Allocation Plan by May 9

“Build Anew” Pathway

You decided to build a new team. Begin with recruitment -- you may have ideas of specific staff and families. Your coach can also help you think through a recruitment strategy. As you assemble your team, focus on intentionally building trust.

Work with your new team to identify strengths and challenges, decide on a few Safe-to-Fail Experiments, and begin implementing your experiments.

Continue implementing your experiments and iterate along the way. Keep track of what you are learning, and work with your coach to document your progress.

“Build Upon” Pathway

Initial 1:1 Coaching Meeting
Thinking about your unique context, you will work with your coach to determine the best pathway for you.

You decided to build from an existing team. As you start, consider any changes this implies for your team, and focus on intentionally building trust.

Work with your existing team to identify strengths and challenges, decide on a few Safe-to-Fail Experiments, and begin implementing your experiments.

Continue implementing your experiments and iterate along the way. Keep track of what you are learning, and work with your coach to document your progress.

Work with your team to plan your Family Engagement Strategy for next year!

“Build Your Own” Pathway

You decided your situation requires a customized approach. Work with your coach to build your own pathway. Regardless of the approach you take, consider how you will assess current strategies, and build trust with a few staff & families that can support you.

Regardless of your approach, develop a plan that identifies strengths & challenges in your family engagement strategies, as well as a few things you’d like to try this year.

Continue implementing your experiments and iterate along the way. Keep track of what you are learning, and work with your coach to document your progress.

The “Build Anew” Pathway

This pathway is designed for leaders who are building a new structure for their Action Team.

Fall 2023

Share your Action Plan by Winter Break

Winter 2023/2024

Share updated Action Plan by Spring Break

Spring 2024

Share Integration & Allocation Plan by May 9

You met with your coach and determined that you want to create a new team with staff and families from your community. Yay!

Start recruiting your team. You may already have an idea of staff and families who might be interested. Your coach can also help you design a recruitment strategy.

Once you start assembling your team, begin by intentionally building trust amongst the team.

Work with your Action Team to identify strengths and challenges.

Then, work together to decide on a few Safe-to-Fail Experiments to try, and begin implementing your experiments.

You and your coach will work together to document your strengths, challenges, and Safe-to-Fail experiments in your Action Plan.

Continue implementing your Safe-to-Fail experiments and iterate along the way based on what you are learning.

Keep track of what you and your Action Team are learning.

Work with your coach to document progress.

Work with your Action Team to plan your Family Engagement Strategy for next year.

Your coach will support you in documenting your 24-25 strategy in your Integration & Allocation Plan.

The “Build Upon” Pathway

This pathway is designed for leaders who are building upon existing structures for their Action Team.

Fall 2023

Share your Action Plan by Winter Break

Winter 2023/2024

Share updated Action Plan by Spring Break

Spring 2024

Share Integration & Allocation Plan by May 9

You met with your coach and determined that you want to build from an existing team structure that includes families and staff to create your Action Team. Yay!

Start by thinking about what changes this implies for your existing team. You might be adding new families or staff, and/or adjusting the purpose for the team.

As you begin, focus on intentionally onboarding new members and building trust amongst the team.

Work with your Action Team to identify strengths and challenges.

Then, work together to decide on a few Safe-to-Fail Experiments to try, and being implementing your experiments.

You and your coach will work together to document your strengths, challenges, and Safe-to-Fail experiments in your Action Plan.

Continue implementing your Safe-to-Fail experiments and iterate along the way based on what you are learning.

Keep track of what you and your Action Team are learning.

Work with your coach to document progress.

Work with your Action Team to plan your Family Engagement Strategy for next year.

Your coach will support you in documenting your 24-25 strategy in your Integration & Allocation Plan.

The “Build Your Own” Pathway

This pathway is designed for leaders who want to create a customized approach.

Fall 2023

Share your Action Plan by Winter Break

Winter 2023/2024

Share updated Action Plan by Spring Break

Spring 2024

Share Integration & Allocation Plan by May 9

You met with your coach and determined that your specific situation requires a customized approach. Yay!

Time to build your own Pathway. Regardless of the approach you take, consider how you will assess your family engagement strategies, and try to build trust with a few staff & families that can support you throughout the year.

Regardless of your approach, develop a plan that identifies strengths & challenges in your family engagement strategies, as well as a few things you'd like to try this year.

You and your coach will work together to document all of this in your Action Plan

Continue implementing your plan and iterate along the way.

Keep track of what you and your team are learning.

Work with your coach to document progress.

Develop your Family Engagement Strategy for next year.

Your coach will support you in documenting your 24-25 strategy in your Integration & Allocation Plan.

What does the work of an Action Team look like?

Fall 2023

Begin recruiting your Action Team. You’ve met with your coach and chosen your pathway. Now it’s time to begin recruiting your action team. Even if you’re on the “Build Upon” pathway, you may want to recruit a few new families, or you might need to help your team consider how its work might be a little different this year. Regardless of which pathway you’re on, try to make sure your team is made up of half families and half school staff, with representation reflective of the racial, ethnic, linguistic, and other diversities of your communities. It’s also important to have a team of people who are willing to reach out beyond the Action Team to hear from the broad spectrum of voices that make up your community. While they may be willing to work with you on the Action Team, they should also be willing to reach out and hear from others as well, and then bring those voices into the Action Team. Your team should be made up of people that are willing to take some risks and speak their truths. *Try to meet a few times before our second whole-cohort session in December, even if it’s just informal check-ins.*

Intentionally build trust amongst staff and families on the Action Team. As you begin building your team, relationships built on trust will have to be at the foundation of your work. See [Appendix A: Sample Action Team Agenda](#) for an activity you can use with your team to build relationships, as well as a few guiding questions you can use to build trust with staff and families if your team has a more informal structure. One of our anchor texts — [Unlocking the “How:” Designing Family Engagement Strategies that Lead to School Success](#) — has additional examples of trust-building practices (see pages 10-13 for approaches used in schools across the country and page 33 for specific leadership moves that promote trust-building across a school).

Begin working on your Action Plan by identifying strengths and challenges with your Action Team. In order to create a plan that is truly responsive to the needs that are felt by your staff and families, you should work with your Action Team to identify what is being done well that can be built upon, as well as areas for improvement. See [Appendix A: Sample Action Team Agenda](#) for an activity to help you unearth strengths and challenges with your team, as well as questions you can use with staff and families if your team has a more informal structure. Your coach may be available to support you in co-facilitating an Action Team meeting.

Important notes on defining family engagement challenges. Do your best to dig deep and identify root causes. Getting a good handle on the true nature of your challenge is critical for effective strategy design. For example, we often hear the challenge: “parents don’t come to our events.” This framing places the blame on families, however, the issue often runs much deeper. When we probe, we usually end up hearing things like, “the hard truth is that some (or many) parents don’t feel welcomed in our school.” How you define the challenges will ultimately impact the design of your approaches.

One way to help your team dig deeper is to ask “why” multiple times. For instance, if you hear “parents don’t come to our school events,” then ask “why is that?” and you hear, “we haven’t always been the most welcoming,” the next question could be, “why is that the case?” Keep asking “why” and you’re more likely to get at the root of the issues. For help in diagnosing root causes, see this excellent [video from Dr. Liz City](#), who is on the faculty at the Harvard Graduate School of Education and teaches K-12 strategy design.

Another way to support your team is to help them avoid framing challenges in terms of what families haven’t done or can’t do, and instead use “we” statements that frame the challenge as owned by the school. Of course, families have important responsibilities when it comes to their children’s learning and well-being, but our work is to do what we can within our sphere of influence to promote more effective partnerships with families, not try to fix families or blame them for the current state of things.

Strengths/challenges examples from last year’s cohort. Here are a few examples from the 22-23 FELI cohort:

- *Strengths:* Our 2nd grade team goes above and beyond to build strong relationships with families; we made a concentrated effort to improve conferences last year by spending more time actually listening to parents and we got glowing feedback; our front office staff are super attentive and make the office a welcoming place for families
- *Challenges:* Spend a lunch period in the break room and you’ll hear a lot of deficit-based language about families; we have a lot of contentious IEP meetings where everyone leaves feeling unheard and demoralized; we do a pretty good job of using data to inform instruction but we don’t do a very good job of explaining what assessment results mean to our families.
 - Notice how the challenges are “we” statements that place the responsibility of leading family engagement initiatives on the school without blaming the parents.

Ask your Action Team to reach out to others. Once your Action Team starts meeting and identifying strengths and challenges, all team members should connect with additional staff and families in order to build a well-rounded perspective. Remember, the Action Team should be a conduit for a broad set of perspectives. These conversations should be seen as casual but also important. Everyone on your team should try to hear from multiple perspectives.

Develop a series of Safe-to-Fail Experiments with your Action Team. You can start to design and implement a few safe-to-fail experiments once you’ve identified the strengths you want to build from and the challenges you’d like to address. A “Safe-to-Fail Experiment” is a small-scale intervention with the goal of experimentation such that failure is not a bad thing. The goal is to try a few small new initiatives or tweak existing ones. We borrow this idea from our friends at The Leadership Academy. They point us to the following key characteristics (see [Appendix B: Safe-to-Fail Experiment Guidance](#) for a more detail):

- Experiment freely and expect failure; failure is good and promotes learning

- Consider as many ideas as possible
- Start with experiments where failure can be tolerated
- Be comfortable with “safe uncertainty” and welcome new possibilities
- Design experiments that can be monitored
- Run multiple experiments
- Share the results of your experiments

Safe-to-Fail Experiments from last year’s cohort. Here are a few examples from the 22-23 FELI cohort:

- The 7th grade team will call 3-5 families each week to check in on how they are doing and how the teacher can work with them to support the child’s learning.
- The counseling team is planning a series of “sidewalk visits” in the neighborhood after school to generate a few positive experiences.
- Parents on our Action Team helped design and recruit for a dads-only event to build relationships with the school staff and each other.
- We will host a “welcome back” open house after winter break focused specifically on unpacking interim assessment results and planning for how families and teachers can support each other in the spring.

Work with your coach to complete and submit your Action Plan before Winter Break. Throughout the course of the Institute, we want to help you document your work and progress. Your coach is available to support you through the documentation process:

- Start by filling out your [Action Plan](#) to codify who makes up your Action Team, the strengths/challenges your team identified, and the safe-to-fail experiments you will try. Then share your plan with your coach.
- In a 1:1 coaching session, your coach can help you flesh it out, edit, finalize, and submit your Action Plan.
- Share your completed plan with your staff and school community. You’ll want folks to know what you’re planning so they can support you and the team, and so they know it’s a priority for you.
- *A Note on Documentation and Submission:* The purpose of this process is not to complete paperwork but to help you track your thinking, goals, and progress. We hope that working together on plans is an exercise that is meaningful. While your coach will share the responsibility of documentation, the plan itself is yours, and you should feel a complete sense of ownership over the plans you and your Action Team create.

Winter 2024

Implement your Safe-to-Fail Experiments and keep track of what your team is learning. As you implement your experiments, members of your team will have ideas about what worked well, what didn't work so well, and how you might tweak the experiments to get an even better outcome. You should continue meeting with your team and note these updates and ideas in the "progress/status update" section of your Action Plan.

Work with your coach to submit an updated Action Plan before Spring Break. Together, you and your coach will flesh out, edit, finalize, and submit an updated Action Plan that includes information on the progress of your safe-to-fail experiments.

Spring 2024

Shift your focus to planning for next year. Work with your Action Team to identify the big lessons from this year, and how you can carry them forward next year through the development of an equity-focused family engagement plan for 2024-2025. Your plan should:

- Be integrated into existing priorities (e.g., school improvement plans, instructional goals, school climate strategies, etc.)
- Involve new and/or re-purposed investments (e.g., increased staff time to partner with families, PD funding, etc.)
- Apply existing management tools (e.g., hiring practices, policies, etc.)

Work with your coach to complete and submit your Integration and Allocation Plan by May 9. The [Integration and Allocation Plan](#) is a graphic organizer to help you codify the equity-focused family engagement plan for 24-25. It is designed to help you and your team consider how you will *integrate* family engagement into your school goals for next year, and decide on which resources you will *allocate* to help your strategies be successful. Ideally, your Integration and Allocation Plan will also support the development of your school or district plans as well.

Just like with the Action Plan, your coach will support you in completing the Integration and Allocation Plan. First, you should begin filling out your Integration and Allocation Plan before meeting with your coach. After you get some thoughts down, share your Plan with your coach and bring it to your coaching session. Together, you can flesh out, edit, finalize, and submit your Plan.

Appendix A: Sample Action Team Agenda

Action Team Session #1 – 90 minutes

This session has two suggested activities:

1. A Conversation Menu meant to build relationships
2. A Protocol for Determining Strengths/Challenges

Note: As written, this agenda will seem most appropriate for an initial Action Team meeting with a group that has a formal structure. However, the questions in the Conversation Menu and the Small Group Discussion on Strengths/Challenges can easily be applied in informal settings as well.

These activities are suggested. Please adapt to fit your needs and priorities.

Conversation Menu Activity

Time	Agenda Item	Materials/Prep
5 mins	<u>Welcome</u> Welcome and thank you so much for agreeing to join the Family Engagement Action Team! The role of this team is a little different from a committee, board, or council which you may have experienced. The primary purpose of an Action Team is to offer a place for shared learning through collaborative action. Because the focus of this Action Team is family engagement, it is also essential that it functions as a conduit for the broader voices of the community. Because of the work we will do together, it is so important that we know each other, and have strong relationships so that is the focus of today's meeting.	
5 mins	<u>Introducing the Conversation Menu</u>	

	<p>We will be using a process called a conversation menu today. Let me briefly explain how it works. In a conversation meal, what fills us up and nourishes us is the conversation, much like food does in a regular meal. And if we imagine we are at a conversation restaurant, we will each get a menu of different questions and get to choose which question we want to talk about. We don't all have to choose the same question, just like at a restaurant we don't all order the same things. And we don't choose them all! The purpose of a conversation meal is to come together as equals, as human beings, leaving behind for the moment our roles, our responsibilities, whatever status we may have, and just get to know each other as people, knowing none of us is better or worse than anyone else, and we have incredibly rich life stories to share.</p>	
20 mins	<p><u>Conversation Menu activity</u></p> <ul style="list-style-type: none"> - Take a minute to read the menu to yourself (sample menu you can iterate upon) - Choose a question you feel comfortable sharing about - In a group of 3-4 people, decide who will share first. - Like a conversation in a restaurant, make sure you listen with all your attention, and feel free to smile, react as a person, affirm, whatever makes sense. - When the first person is done, take a moment to thank them and then move to the next person. 	<p>Conversation Menu</p> <p>Assign groups</p>
5 mins	<p><u>Debrief</u></p> <p>Once everyone has met, debrief as a group using a few starter questions:</p> <ul style="list-style-type: none"> - What did we learn about each other? - Why is it important to connect with one another before we start this work together? 	

Protocol for Determining Strengths/Challenges

Time	Agenda Item	Materials/Prep
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5 mins	<p><u>Introducing Strengths/Challenges</u></p> <p>This activity is meant to help us think about what is working and what challenges we have in making sure that all families have a voice, feel included, and can be engaged in our school community.</p> <p>Guiding principles:</p> <ul style="list-style-type: none"> ● We represent our own experiences. We need to listen to people outside of this room to understand others' experiences. ● Honesty propels growth. If we do not trust one another enough to be honest with each other about challenges, we will not make progress. ● Challenges are not the fault of individual people. We will not blame families, children, or educators as we surface challenges. 	
30 mins	<p><u>Small group discussion on strengths/challenges</u></p> <p>We are going to break into 2-3 small groups, each with a few teachers and families in each group.</p> <p>Simple instructions:</p> <ul style="list-style-type: none"> ● You will first have 3 minutes to think individually on the following questions and jot notes if you want to. ● After 3 minutes, you should share round robin in your group. One person should capture notes on a flip chart page. <p>Questions for families:</p> <ul style="list-style-type: none"> ● Has your child ever had a teacher who really went out of their way to help you feel heard? Someone you could really trust and be honest with. Someone who made you feel like you were on a team. What did that teacher do to help you feel that way? Please be specific. How did that make you feel? ● Can you give an opposite example (without naming names)? You can also speak on behalf of someone else that you know in the community. The point here is to be honest. <i>Note: it can sometimes be uncomfortable, but if we don't raise challenges regarding trust, it may be difficult to develop strong plans later.</i> ● Has any teacher ever made a plan with you to support your child's learning and well-being? It could be something formal like an IEP or something more casual and informal. 	<p>Turn guiding questions into worksheets</p> <p>Flip charts</p> <p>Markers</p> <p>Pens</p>

	<ul style="list-style-type: none"> ○ If yes, talk about what you liked about the plan, how you were consulted, and maybe anything you did differently at home as a result of making that plan. ○ If no, talk about what the value of a parent-teacher plan might be for your child. <p>Questions for staff:</p> <ul style="list-style-type: none"> ● Which teachers at this school really excel at building trusting relationships with families? <ul style="list-style-type: none"> ○ What kinds of things do these teachers do that help parents trust them? ○ In what ways do they seek input from families about their children? ○ What is it about how they view their work with families that makes them a little different? ● Can you give an opposite example (without naming names)? You can also speak on behalf of someone else that you know in the community. The point here is to be honest. ● If you had 30 minutes of paid time every day to build trust with families and collaborate with them to support your students – what would be the best use of that time? Think about the family engagement experiences that have been most productive at building trust from what you have seen in your teaching career. 	
10 mins	<p><u>Group share-out</u></p> <p>Each group shares out from your flip chart to give the other group a sense of the conversation. During share outs, be sure to take detailed notes; the share out will give you a sense of the strengths/challenges in your context, which you'll want to document in your Action Plan.</p>	<p>Flip chart paper</p> <p>Pens</p>
5 mins	<p><u>Next steps for Action Team</u></p> <ul style="list-style-type: none"> ● Each member of the team should arrange for a 1-on-1 conversation with at least 1 parent and 1 teacher from the school. The purpose is to get to know them, and to ask some of these questions. ● Soon we'll start working on some safe-to-fail experiments, and it will be important to bring in the voices of our broader community. 	<p>Handout of suggested questions</p>
5 mins	<p><u>Closing</u></p> <p>Closings are very important. Please leave at least 5 minutes for a round robin response to 1-2 questions. Take notes on what emerges. A few suggested questions:</p>	<p>Flip chart paper</p> <p>Pens</p>

	<ul style="list-style-type: none">• How did this session feel?• What are you left thinking about?• Answer this prompt: I used to think _____. Now I think _____.	
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CONSIDERATIONS WHEN DESIGNING SAFE TO FAIL EXPERIMENTS

1. **EXPERIMENT FREELY AND EXPECT FAILURE. FAILURE IS GOOD AND PROMOTES LEARNING.**
2. **Consider as many ideas as possible** for experimentation: any idea that has a remote possibility of creating improvement that be carried out within the next twelve weeks.
3. **Start with experiments where failure can be tolerated.** That is, choose experiments where the overall impact of failure on the system is likely to be small and/or manageable.
4. **Be comfortable with ‘safe uncertainty’** – just enough structure, just enough control, just enough planning to mitigate the biggest of risks whilst leaving enough fluidity, spontaneity and freedom to **welcome new possibilities.**
5. **Design experiments that can be monitored.** To plan future experiments, you need be able to determine whether the outcome of an experiment was favorable.
6. **Run multiple experiments** in parallel. In safe-fail mode, this is not only permissible, but also encouraged where experiments can be isolated and results independently evaluated. Over time, experiments producing undesirable results should be wound up and new experiments started in promising areas.
7. **Share the results of your experiments** with others, and learn from the results of their experiments, including about yourself. This is just a logical extension of the idea to run experiments in parallel. You must be cautious, however, because the differences between your context and theirs may be difficult to isolate. Therefore, do not assume that someone else’s results can be replicated within your system.