



Client: Montessori Leaders Collaborative

Facilitator: Michael Randel, Randel Consulting Associates

A summary description of the project and its benefits

The Montessori Leaders Collaborative came into existence because of a facilitated meeting 18 months ago. Leaders from divided organizations now have a shared vision and are clear on how they can positively influence education reform in the United States. For the first time, they are working together on specific projects.

This was enabled by professional facilitators, working over multiple face-to-face and virtual meetings with twenty courageous leaders, ready to work in new ways, committed to make a difference together.

The Montessori Leaders Collaborative are leaders and advocates from the Montessori movement, working together to reform education and bring Montessori to more children in United States.

Submitted: February 2013

Awarded: June 2013

Background:

In December 2010, the McCall Kulak Family Foundation and the McTeague Catalyst Fund ("The Foundations") were new to grant-making and new to large-scale strategic program endeavors. Their shared interest was to engage with the leaders of Montessori education organizations across the United States around an opportunity to bring Montessori education to its rightful place in the US education debate. They were aware of a number of historical divisions between these organizations, and that there was no unified voice that could speak authoritatively for Montessori.

A Landscape Analysis, completed in March 2011 by Miller Philanthropy Craft, confirmed that the weak state of the Montessori movement and a divided leadership, lacking credible research and strategic communications, would make any initiative to engage in the national education debate highly risky and likely to fail.

The Foundations had set themselves an ambitious agenda that included building an effective advocacy movement for Montessori education that engaged in the public policy debate around public school reform. The Landscape Analysis made clear that it would be impossible to bring Montessori to the policy table unless it could demonstrate that it was a unified, professional and credible model for education reform. The Foundations decided in mid-2011 to convene the leaders of six major Montessori organizations and some independent advocates. Their intent was to explore together the possibility of beginning a national dialogue on whether the Montessori movement was ready to address these challenges.

Event Details

The group, which has named itself the "Montessori Leaders Collaborative", has now met seven times, spending almost 11 days in dialogue and planning meetings over a 14-month period.

The initial two-day meeting, held in New York City in December 2011 with 11 leaders from 6 organizations, was a historic gathering - the first of its kind in over 60 years. Bringing together the Executive Directors and Board Members of the invited organizations, along with influential independent advocates, the purpose of the meeting was to dialogue on ways in which the Montessori movement might have greater influence on education reform by acting

in a more collaborative manner. All the participants deemed the meeting successful, and agreed to take some steps together. By the beginning of 2013, the group is establishing a rhythm of face-to-face and virtual meetings, supported by an active listserv for ongoing communication.

There have been three virtual meetings of the whole group, bringing participants together across 9 time zones for multi-hour dialogue. The group has used innovative virtual meeting tools to provide a shared display, to support frank discussion around shared goals, and to make significant decisions together.

There have been three further face-to-face meetings, ranging from 1 to 3 days. As the group's capacity to listen respectfully has grown, they have begun to vision together and to identify the bold steps they need to take in order to align a divided national movement and have significant impact on education reform in the United States.

The group has agreed on criteria for adding additional people into their collaboration. There are now 17 members, all leaders of major Montessori organizations, with the newer members smoothly integrated into and successfully committed to the group's work and collaborative values. An ambitious work program for 2013 and beyond is developing, and a further series of meetings is scheduled for 2013.

Outcomes:

In the 18 months since the invitations for the first meeting were issued, the Montessori Leaders Collaborative has accomplished the following as a direct consequence of its facilitated meetings:

- Convened key leaders from the Montessori movement in the US (many of whom had fragile and, in some cases, seemingly irreparable relationships) in order to launch a trust-building and strategic planning process.
- Succeeded in establishing a national "entity", the Montessori Leaders Collaborative (MLC), that is committed to advancing the national Montessori agenda with a unified voice.
- Defined and adopted a vision for their work: to bring Montessori to more children in the US, especially those children in public sector schools who will benefit the most.
- Defined a series of long-term strategic program goals ("Bold Steps") to bring that vision to fruition, including Teacher Training, Early Childhood Education, Research and

Communications and Advocacy. (A number of Working Groups have recently been established to operationalize and implement these strategic program goals).

- Developed and given presentations in high-profile national and international conferences that have shared the vision and goals of MLC, and modeled a collaborative approach to public policy advocacy. These presentations are legitimizing local efforts to work collaboratively across organizational divisions.
- Incited additional funders to support their collaborative approach to strategic program goals, and accessed significant funding that has previously been unavailable to the Montessori movement.

It is clear that the careful design and skillful facilitation of each of our meetings has been central to this new collaborative spirit. While the careful identification and invitation of participants by the Foundations was critical to the dynamics of the first meeting, and the face-to-face meetings have sought out venues where evening meals can be critical places for relationship building, the spirit of openness, inquiry and collaboration has grown out of the significant and deep exchanges that have taken place during the facilitated meetings. The growing trust among group members, the deepening personal and organizational relationships, flow from the excitement of finding common ground together and collaboratively building a new future. And all the participants have expressed how critical the facilitation has been in building their trust and hope for a collaborative future.

The collaborative processes are also characteristics of the new Working Groups that are pursuing strategic program goals, with most of them using facilitation to do their work together. Some of the participating organizations have launched their own facilitated initiatives to promote dialogue and internal alignment with their national membership (one group convened 150 people for an Appreciative Inquiry Summit). Collaboration is also the key characteristic of a significant session that members of the MLC have designed and will present together at the upcoming quadrennial global International Montessori Congress.

Best Practices:

Each of the 7 meetings of the Montessori Leaders Collaborative has been characterized by careful design and skillful facilitation. We have noted the following "Best Practices" across the meetings:

- All participants were interviewed by the facilitators before the first meeting, and their ideas were incorporated into the design of the meeting. All new participants continue to speak with the facilitators before their first meeting.
- Great care is taken in the selection and layout of the meeting venues. Participants are welcomed into a dialogue circle, which forms the heart of the meeting space. This allows participants to sit as equals, shoulder to shoulder, as they exchange views and dreams with one another.
- The facilitator has been flexible and progressive in the way each meeting has been designed and facilitated. While the dialogue circle was an important feature of the first two meetings, recent meetings have been marked by a more strategic orientation, with a focus on action priorities. This evolution of the design and facilitation style of the facilitator to mirror the growing capability and maturity of the group has enabled the group's journey together.
- The facilitator has introduced specific meeting methodologies when they have been appropriate to the group's evolution. For example, a Vision Cafe/World Cafe design was used in the 5th meeting, anticipating and enabling the group's need to articulate a common vision and bold steps to that future.
- Attention is continuously given to Shared Display, so that the range of opinions and ideas can be kept in focus, and serve as a platform for reinforcing common ground. This has been a characteristic of both the face-to-face and the virtual meetings.
- There has been a deliberate use of a two-person facilitation team in meetings that last longer than 1 day, allowing a dynamic partnership where one person facilitates the group process while the other documents the work.
- The facilitator has identified and introduced appropriate tools and processes to support the group's virtual meetings. The group has benefitted greatly from the ways in which the Pownoodle tool has facilitated deepening trust and collective experiences of decision-making.

- Great care has been taken in the development of Meeting Reports as artifacts that capture the spirit as well as the detail of each meeting. The reports provide a rich synthesis of the dialogue, while also providing a valuable record of discussion, agreements, and decisions.
- From the start of the engagement, the Lead Facilitator has served as an advisor to the Foundations convening this series of meetings. He works closely with them to anticipate the group's needs and to adapt to catalyzing events that occur between meetings. He has advised the Foundations on the rhythm of meetings over the year, and the timing and duration of meetings.

Code of Ethics:

We have had many opportunities to observe the Lead Facilitator in action over the last 18 months, both in a facilitation role and in his advisory role. We have observed a number of things which indicate ways in which he leads his team in a manner that is ethical and promotes the values of the facilitation profession:

- **Client Service** - Michael has carefully managed the dynamics of contracting with the Foundations, who have had a specific purpose for convening the Montessori Leaders, and formed a productive working relationship with them. He has also navigated the dynamics of his contract with the group as a whole, working in ways that advance its interests while being respectful of individual needs.
- **Conflict of Interest** – Michael and his team work hard through all the meetings to remain independent of any conflicts of interest. They have announced to the group that they will not serve as consultants to any individual Montessori organization while they remain engaged in the work of the Montessori Leaders Collaborative.
- **Group Autonomy** – The team has nurtured the culture of this new group, and created a respectful space within which participants can participate as they choose. Michael is responsive to the group's requests and choices, and very adaptable to making changes in the agenda as needed.
- **Processes, Methods and Tools** – Michael has carefully designed each meeting to support its specific outcomes. He has sought out and introduced appropriate processes at each stage of the group's work, and drawn on experts to enable the group to productively use specialist processes and methods.

- **Respect, Safety, Equity, and Trust** – In a context of low trust and poor relationships, Michael has successfully designed and led processes that have engendered trust, relationship and community. He has respected the choices of individual members to not participate in certain processes. He designed the entry and integration of 6 new members into an existing group dynamic.
- **Stewardship of Process** – Michael has been vigilant about his responsibility for the group’s process, and has remained impartial throughout the work to the decisions made by the group.
- **Confidentiality** – In a context of forming and changing alliances and low trust/suspicion towards others, Michael has clearly positioned himself as neutral and independent facilitator. He carefully hears confidences presented to him, and gains permission to share these with the Foundations or the Group as appropriate.
- **Professional Development** – This work over 18 months has required adaptiveness and flexibility as the group moves into new territory. We have observed how Michael continually seeks out new knowledge, tools and skills to prepare himself to assist the group as it meets fresh challenges.

Additional Information and Special Circumstances:

When the Foundations began this work in 2010, we were not sure that people would respond to an invitation to meet together. We initially thought that we needed a Conflict Resolution specialist to lead the meeting, so intense were the divisions and the conflict between the organizations.

Michael's approach to the challenge persuaded us that we would be better off adopting a future orientation, and we invited the participants to be in dialogue about the opportunities that education reform presented to the field. We were not sure that the first meeting would succeed, nor if it would be possible to do anything after that meeting.

The facts are that the group continues to meet 14 months later; that it has expanded its membership to promote a more inclusive approach across the movement; that it is launching Working Groups that are working collaboratively on strategic goals and involving a wider circle of leaders; and that it is mobilizing new funding to support and enable this work to grow and to have a significant national influence.

This is only possible because the Foundations believed that it was time to invite the leaders of Montessori organizations to get past their divisions; because those leaders took the invitation and the opportunity to meet and behave collaboratively; and because we invited our facilitator to be our partner and our guide on this amazing journey that has the potential to impact the lives of children across the country and around the world.

Without facilitation, we would not have been able to get past that first meeting. With facilitation, we have begun to change our world, and we intend to change your world along the way.

Background information about the facilitator and client organization

Michael Randel is the Director of Randel Consulting Associates, a consulting firm he founded in 2006. Michael is an experienced facilitator and organization development consultant with more than twenty years' experience working with organizations in over than thirty countries.

Michael's primary area of expertise is building the effectiveness of teams and organizations to achieve results. He works across the spectrum of private, public and non-profit sector organizations to address their needs for planning, team building, meeting facilitation and capacity building. Michael has trained in a variety of group process and facilitation methods, and became a Certified Professional Facilitator (CPF) in 2010.

Michael grew up in South Africa, learning to facilitate while working with groups seeking the end of Apartheid. He now lives with family in the suburbs of Washington, D.C.

The **Montessori Leaders Collaborative** is an association of leaders, advocates and funders from the Montessori movement in the United States. The group's formation was catalyzed by an invitation to dialogue that took place in New York City in December 2011, and it has now grown to include 20 members.

In its short life, the group has begun sharing a common vision for the future of education in the United States and is actively building common ground through which the organizations they lead can collaborate to influence public policy in a positive direction. The group continues to meet regularly, and looks forward to their next facilitated meeting.

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