



PROFESSIONAL
LEARNING
PARTNER GUIDE

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EDUCATION

Professional Learning Partner Playbook

Your guide to selecting and managing professional learning partners.

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GUIDE TO EFFECTIVELY MANAGING PL PARTNERS

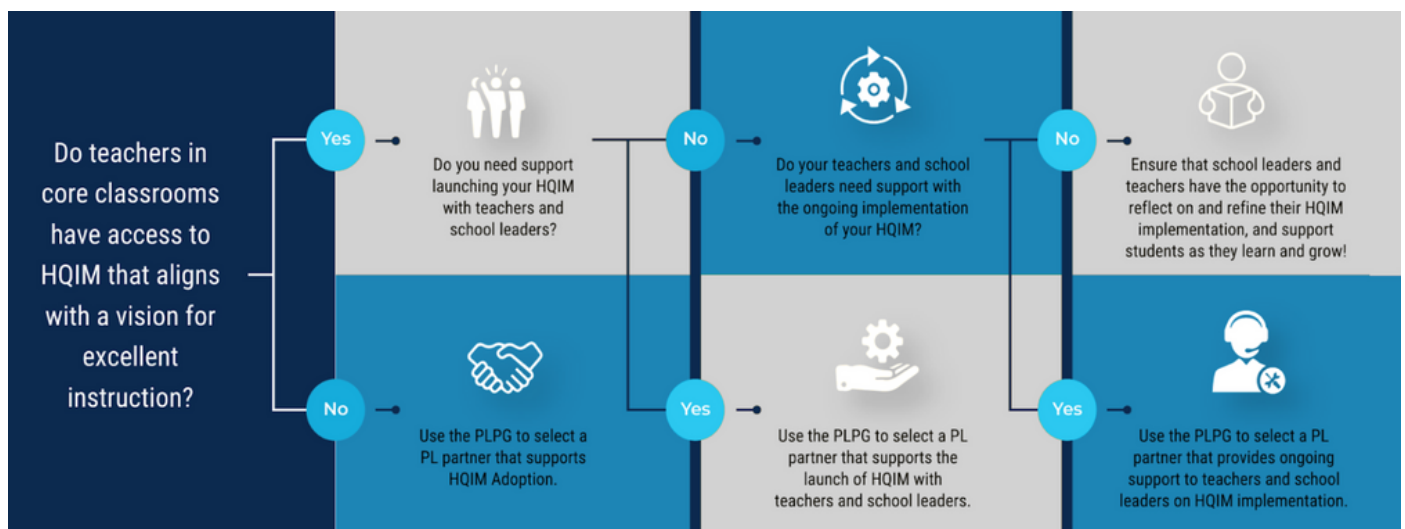
Steps and examples on how to be clear and effective when working with professional learning partners.

Steps to Selecting a Great Professional Learning Partner

The following steps serve as a guide in identifying and selecting a high-quality professional learning partner to support the adoption or implementation of high-quality instructional materials (HQIM) in your school or system.

→ Define Your Needs

Before researching professional learning partners to provide services to your district and schools, you should identify your professional learning needs and goals by asking yourself the following questions:



→ Identify Partners that Meet Your Needs

Once you have identified your professional learning needs, use the [Professional Learning Partner Guide](#) to identify professional learning partners that provide services to meet them. Specifically, you can use the filters on the Professional Learning Partner [search page](#) to refine your search and review matching professional learning partner profiles to determine if their services are aligned with your professional learning and academic goals.

Once you have narrowed your list of professional learning partners, you can:

1. Draft a Request for Proposals for professional learning services and encourage providers to apply. View Rivet's [Guide to Writing Effective RFPs](#) for curriculum-based professional learning (CBPL) service, or contact us for additional support.
2. Interview the professional learning partners on your list using the [Professional Learning Partner Interview Guide](#).

→ Select a Partner

Based on the results of your RFP or interviews, select the professional learning partner that best meets your professional learning needs.

Questions to consider as you finalize your decision:

1. Does this partner's services align with our academic vision, and will the services help us achieve our professional learning and academic goals?
2. Will this partner help us build capacity within our leadership team to support the implementation of HQIM beyond the contract term?
3. Will this partner's services support or contradict services that we are currently receiving from other professional learning vendors?
4. What non-negotiable professional learning services, facilitator requirements, materials, or communications must be negotiated and included in the contract?

→ **Onboard Your Vendor**

After the contract is signed, but before services begin, you should hold a kick-off meeting with your new professional learning partner to align the goals and objectives of your partnership. During this meeting, you should:

- Communicate your academic vision and how your partner will help you achieve it
- Provide an overview of your district's current professional learning practices and discuss which of these should stop, start, or continue to achieve your professional learning goals
- Discuss how the professional learning providers' practices coincide with your practices, as well as where they may contradict, and create a plan for cohesion, avoiding confusion in the field
- Review the non-negotiables you included in the contract and how you will measure if they are met and
- Establish a plan for monitoring professional learning services, providing feedback to the provider from all users, and refining the scope of work based on these data.

Guide to Interviewing Professional Learning Providers

This document guides schools and school system leaders in preparing for and conducting interviews with potential professional learning partners they have found in the Professional Learning Partner Guide (PLPG).

PREPARING FOR INTERVIEWS

Determine your non-negotiables for professional learning services, materials, or communications and ask providers about their ability to meet them. These questions are suggestions for your conversation and should be used or modified to reflect your local district context.

PROFESSIONAL LEARNING TYPES

High-quality, curriculum-aligned professional learning serves four different purposes that are tailored to specific audiences and stages of high-quality instructional materials (HQIM) implementation.

1. Adoption
2. Launch
3. Ongoing Support for Teachers
4. System Design & Leadership Support

General Questions

Key questions to ask PL providers

Things to look for in their response

Has your organization worked with districts/schools like mine in the past? If so, can you describe the partnership and the services you provided? How did your services improve student achievement there?

What were some of the challenges you encountered working with a district/school like mine, and how did you overcome them?

The PL provider describes their work with districts like yours and is able to speak specifically about the services provided. They are able to identify specific outcomes in either teacher practice or student growth that correlate with their services.

Describe how your PL will help our district address equity and mindsets to ensure all of our students engage in grade-level work.

The PL provider communicates a clear focus on equity and the belief that all students can and deserve the opportunity to engage with meaningful, grade-level work. Look for elements of this belief in PL providers' responses to these questions. For example, the provider talks about how it helps teachers understand the importance of providing grade-level texts to all students, with the proper support.

Key questions to ask PL providers

Things to look for in their response

What conditions (e.g. school-based instructional coaches, daily planning time, monthly PD days, etc.) or nonnegotiables would you like to see in place in my district/ school to ensure a successful partnership?

How can you support us with putting the conditions we don't currently have in place?

The PL providers should be able to give you specific and concrete responses in plain language, leaving you feeling clear and confident that they're not thinking through these questions for the first time. For example, in response to the question about conditions, a PL provider whose model focuses on building the capacity of leaders might state that the math instructional lead must be willing to join a weekly, 45-minute check-in with the coach assigned to their school and the principal needs to join a monthly check-in.

We already have X systems in place in our district to support teachers and school leaders. Can you talk briefly about how much you would be willing to coordinate with us or align your practices with ours?

We're already working with X organization, which is providing Y services. Can you talk briefly about how much you would be willing to coordinate with them to ensure all the work aligns? What might that look like?

Be upfront with the PL provider about your non-negotiables and their willingness to better understand and work within your context and constraints. For example, do you already have a strong observation tool that is specific to your HQIM or aligned to the shifts? If so, you might require that your PL provider use it to observe and provide feedback to your teachers, rather than introducing a new tool of their own.

Key questions to ask PL providers

Things to look for in their response

Where have you seen your services go wrong or not work? Why?

The PL provider clearly communicates a desire to improve its services, has a concrete plan to measure effectiveness, and provides compelling anecdotes/data around how evaluation data has changed facilitation practices over time.

How does your organization train your facilitators to be experts on HQIM? How are they evaluated? How do you ensure facilitators remain consistent across our engagement?

The PL provider has a clear process for training and evaluating all facilitators, ensuring they can meet a consistent bar across engagements.

Can I see materials from a professional development your group has executed? Can I see a video clip of one of your facilitators?

Because you want to honor intellectual property, a provider may or may not wish to share samples. Not sharing should not deter your decision-making process.

Questions Related to Specific Types of CBPL Services

ADOPTION

Key questions to ask PL providers

Things to look for in their response

Can you give me an example of how your organization helped a current or former client design and execute a process for adopting HQIM aligned to their vision for excellent instruction? What was the learning series you took them through?

Can you give me an example of how your organization has assisted a current or previous client with stakeholder engagement during the process of adopting high-quality instructional materials? What stakeholder groups did you involve, and how did you support the client in getting them on board?

The PL provider succinctly describes how they supported a district in designing and executing an effective adoption process that led to the selection of HQIM aligned with the district's vision. Listen for steps such as:

- defining a process and timeline
- convening and training a review/selection committee
- developing a vision for excellent instruction, adopting/developing/modifying a rubric that aligns with the vision
- leveraging reliable and nationally or state recognized resources to identify HQIM
- reviewing, piloting, procuring, and distributing materials

Listen for an implicit or explicit nod to why stakeholder engagement matters. The PL provider should identify a diverse group of stakeholders who are likely to play a role in who influences the adoption of instructional materials in their client's system (e.g. teachers, administrators, students, parents, school board, etc.). They should also briefly describe the steps they walked their client through to help them get those stakeholders on board.

Key questions to ask PL providers

Things to look for in their response

Can you give me an example of how you've helped a current or former client communicate the link between their adopted HQIM and their vision for excellent instruction?

Can you give me an example of how you've helped a current or former client ensure that their teachers and leaders understand the approach and structure of our adopted HQIM? What does that learning series look like?

Describe how you help clients organize and plan for the logistical considerations of launching new high-quality instructional materials.

How do you help leaders understand the steps they need to take to manage change regarding implementing HQIM effectively?

The PL provider succinctly describes how they believe that high-quality instructional materials support teachers to achieve the articulated vision (e.g. by increasing the likelihood that students engage with grade-level work) and can share ideas for plans that effectively invest all stakeholders in the work.

The PL provider's response reveals that they understand the major attributes of the adopted HQIM, including

- the approach to critical content within and across grades
- how it is structured (lessons, domains, units, etc.)
- major features (such as typical/consistent lesson features and opportunities for measuring student progress through screeners and assessments).

Key questions to ask PL providers

Things to look for in their response

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Can you give me an example of how you've helped a current or former client ensure that their teachers and leaders understand the approach and structure of our adopted HQIM? What does that learning series look like?

Describe how you help clients organize and plan for the logistical considerations of launching new high-quality instructional materials.

How do you help leaders understand the steps they need to take to manage change regarding implementing HQIM effectively?

PL provider offers a planning tool for logistical considerations that ensures a smooth launch of high-quality instructional materials. This should include items such as

- budgeting/pricing
- securing print materials
- accessing digital components/resources
- the number of copies needed per class or per student
- timing of distribution
- planning replenishment cycles for damaged books/materials

The PL provider communicates a belief that all students have the ability to, and deserve the opportunity to engage with meaningful, grade-level work. For example, the provider talks about how it helps teachers understand the importance of providing grade-level texts to all students with the proper support despite their race, background, or ability.

Key questions to ask PL providers

Things to look for in their response

How are your services differentiated for different groups of teachers? For example, when teachers struggle beyond the initial implementation? How do you handle varying needs in tight or limited timeframes?

Can you send me an example of a template or protocol you encourage teachers to use to help them prepare to teach units and lessons from X HQIM?

How does your PL equip teachers to address the needs of students with unfinished learning using HQIM-embedded supports?

PL services are appropriately grouped by subject and grade band to provide content-specific training to teachers. Additional coaching services are available for teachers who could benefit from further support.

The PL provider supplies resources that focus on helping teachers prepare to teach lessons from their HQIM (e.g. annotate the teacher notes to indicate places where specific students will need additional scaffolding). They will also equip teachers to use these resources in individual and collaborative planning time.

Listen for evidence that the PL provider believes the end goal is to ensure all students – including those who struggle – can engage with grade-level, as opposed to below-grade level work.

The PL provider places a premium on equipping teachers to use the HQIM embedded supports to address the needs of students with unfinished learning (as opposed to introducing a whole new set of supports that live outside the curriculum) and can give a couple of examples of these types of support (e.g. using intervention time to have students who lack background knowledge on the topic of an upcoming unit in the curriculum, to read and discuss a few, simpler texts on that topic).

SYSTEM DESIGN & LEADERSHIP SUPPORT

Key questions to ask PL providers

Things to look for in their response

How does your PL help leaders articulate and stay focused on ways the effective implementation of our HQIM supports a broader vision for excellent instruction?

How are your services or coaching for leaders differentiated based on their varying expertise with HQIM?

How does your PL support leaders in monitoring the effectiveness of implementation and providing feedback to teachers? What rubric/tool does your organization recommend for this, how are leaders trained and normed, and how are teachers introduced to its expectations?

What are the classic pitfalls of implementation that you help leaders identify and overcome?

Listen for evidence that the provider supports leaders to consistently communicate the connection between the instructional vision and the HQIM, and supports leaders with prioritizing the HQIM in their overall district or school strategy (e.g. highlighting effective examples of implementation during faculty meetings, reviewing district or school level strategic plans for alignment to the HQIM)

The PL provider provides differentiated coaching opportunities to school leaders to support them with their unique implementation or leadership challenges.

The PL provides training, norming opportunities, and ongoing coaching with a rubric or other classroom walkthrough tool that is specific to your HQIM or aligned to the shifts or math practices. This includes a suggested plan for communicating this tool and its expectations to teachers.

The PL provider is able to identify pitfalls in implementation that leaders may encounter and demonstrate how their PL services will help them to plan for these obstacles proactively.

Guide to Effectively Managing PL Partners

Adopting and successfully implementing high-quality instructional materials (HQIM) is challenging, but can have big payoffs for students and teachers. Many schools and school systems benefit from partnering with external organizations to help leaders successfully manage the implementation process.

Professional learning partners can provide practical support for complex tasks, such as defining and building broad investment in a vision for excellent instruction, conducting a materials selection process, and supporting the successful launch and ongoing use of those materials.

This guide helps leaders get the most out of their partnerships with professional learning providers to:

- reduce mixed messages and confusion, especially for teachers
- define roles and responsibilities for partners
- set clear expectations for customized services that reflect your systems' priorities and needs

Building Cohesion Among Partners



STEP ONE | Define your instructional vision and strategy

A clearly defined vision and strategy are a guiding light — directing, aligning, and inspiring action. Without them, attempts to improve student outcomes can easily dissolve into a list of confusing, incompatible, and time-consuming projects that go in the wrong direction or nowhere at all. You must define your instructional vision and strategy before your school system can communicate it to your partners.

Be wary of chasing too many priorities or attempting too many strategies; it's like throwing spaghetti at the wall and hoping something sticks. Studies have shown that doing so fosters incoherence, makes it harder to allocate resources effectively, and increases the likelihood that teams spin their wheels.¹ Instead, focus on one or two key priorities and a few strategies you believe will most likely lead to meaningful progress toward those priorities.

¹ Paul Leinwand and Cesare Mainardi. (2011, April). Stop Chasing Too Many Priorities. Harvard Business Review. Retrieved from: <https://hbr.org/2011/04/stop-chasing-too-many-prioriti>

EXAMPLE

Instructional Priority: To ensure every student can engage in grade-level content and every teacher's instruction fosters mastery of that content for all students.

Instructional Strategy: Ensure all core teachers
1) have access to HQIM, and
2) receive initial and ongoing professional learning that helps them use those materials effectively.



STEP TWO | Share your instructional vision and strategy with your partner and define their role in achieving it.

Adopting and implementing new instructional materials is an exercise in change management. One of the biggest mistakes that organizations make when embarking on a process like this is under-communicating the vision by a factor of 10 (or 1,000²). Don't assume your partner knows what's important to your school and system. Without your clear direction, they will likely bring their own priorities and strategies to the work, which may or may not fully align with yours.

You should also define the role you want your partner to play in executing your instructional strategy to facilitate clear and effective information-sharing and to avoid overlap in their work.

If using multiple PL providers, consider bringing them together — virtually or in person — once or twice a year to share and reshare your school system's Northstar and ensure that they are clear on their role in helping you achieve your goals.

² Kotter, J. P. (2021) *Leading Change*. Boston: Harvard Business School Press

EXAMPLE

A district might hire one partner to support its elementary ELA teachers implementing CKLA and another partner to work with its principals.

To ensure cohesion across the partners, the district should set the expectation that they hop on the phone with each other once a month to discuss trends that they're seeing and identify places where they can collaborate to support teacher growth.



STEP THREE | Set clear expectations for the language and tools you expect your partner to use.

Though there will likely be places where you are open to your partner suggesting new approaches— you did hire them for their expertise, after all— there will be other places where your school system has already established language, systems, procedures, and tools you want them to use. Being upfront with your partner will reduce the likelihood that they unintentionally contradict expectations that you (or other partners) have set for your educators, thereby reducing potential confusion and frustration for all involved.

PARTNER TIP

Utilize the expertise of your partner to evaluate the effectiveness of your current tools and resources in helping your district achieve its instructional vision and strategy. Their feedback and perspective can lead to meaningful change in teacher practice.

Observation tools are a common place where this type of confusion can occur. Do you already have a strong observation tool specific to your HQIM (e.g. [Zearn’s Classroom Walkthrough Guide](#)) or aligned to the [shifts](#) (e.g. [Instructional Practice Guides](#))? If you do, you might require that your partner observes and provides feedback to your teachers using your tool rather than introducing a new one. If not, this is a great place to ask for help from a [partner](#) with the expertise to recommend a good one.



STEP FOUR | Establish concrete goals, timelines, and regular touchpoints to discuss progress and solve issues

Establish and hold your partners accountable for following agreed-upon timelines and achieving measurable results. Even though the best laid out plans will likely evolve over time, working with your partner to define goals and timelines early on will help avoid confusion. Additionally, having clear goals and timelines from the beginning will help you and your partner have more productive conversations about amending contract terms in light of new information or circumstances.

We recommend schools and school systems set recurring check-ins with individual partners to discuss progress, challenges, and next steps. For example, you might schedule 30–60 minute monthly check-ins and longer (60 – 120 minute) stepback meetings once a quarter to take a deeper look at where your partner is against their goals and to address bigger issues and trends.

PARTNER TIP

Establish clear communications protocols with your partner on how and when information and materials should be shared with school leaders and teachers including:

- Review of materials prior to dissemination
- How and when to elevate issues observed in the field
- Frequency structure of ongoing check-ins

Interested in additional support?

Selecting the Right Partner

Rivet Education can be an objective third party to manage your professional learning partner selection process. Having spent the last five years supporting school systems with the adoption and implementation of HQIM, we know what works, what doesn't, and how to tell the difference.

Building Cohesion Among PL Partners

Having spent the last five years supporting school systems with the adoption and implementation of HQIM— Rivet's team knows how important but challenging it can be to coordinate among multiple professional learning partners who are all trying to provide the best services to educators within a school or school system. We've also seen what works and what doesn't.



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