

Organizing Introductory Meetings With Potential Partners

Dan Gallagher, Seattle Public Schools

Tool 3A: Agenda for a meeting to explore partnership

Often the origin of a partnership is a specific project, proposed by one institution to another, with deeper partnership evolving over time. Alternatively, foundations for a partnership can be laid without a specific project in mind. Potential partners can explore one another's interests, expertise, values, and general sense of what it would be like to work with one another. After familiarity and trust have been established, partners can jointly develop a proposal for work when an opportunity presents itself.

Below is an example of an agenda for a meeting that occurred between an urban school district, the city's housing authority department, and STEM education researchers from the local university, to explore ways they might work together to improve equitable STEM education for the city's youth. The school district Science Manager had a history with each of the people present, but the others had not met. He knew they had overlapping values and interests, complementary expertise and the potential to work together in a fulfilling partnership. Use this as a tool to pattern an agenda for an exploratory meeting between potential partners in your context. To aid your use of this agenda as a tool, the right-hand column is an annotation with questions participants should consider.

Topic: Introductory discussion of potential STEM-focused partnership

Attendees: City School District, City Housing Authority, State University STEM education researchers

Intended outcomes:

- Knowledge of each other's work
- Identification of potential jointly pursued activity
- Next steps to move forward on activity
- How to name or label the activity for 2-3 audiences or stakeholders

Agenda items	Questions participants consider as they listen
[10 min] Introductions and overview of agenda	<i>How is this exploratory meeting different from a typical proposal pitch meeting?</i>
[15 min] City School District Science Director <ul style="list-style-type: none"> • Strategic plan initiatives • District organizational and authority structures • Assessment context • Current science professional 	<i>Can I connect my interests to the district's overall strategic plans? What is the scope of authority of the Science Manager? What is a partial "map of the system" to consider leverage points? How can I connect my work to the various high-stakes and low-stakes assessments in the district? What dimensions of the Science</i>

<p>development initiatives</p> <ul style="list-style-type: none"> • Challenges, problems of practice, opportunities • Clarification and discussion 	<p><i>Manager’s work connect to my work and interests?</i></p>
<p>[15 min] City School District Community Partnership Director</p> <ul style="list-style-type: none"> • Director’s role and department vision • Previous and current partnership work • Current capabilities and capacities • Challenges, problems of practice, opportunities • Clarification and discussion 	<p><i>What is scope of authority of the Community Partnership Director? Am I confident that this person knows how to partner with others effectively and respectfully? What is the scale of possibility for partnering? What dimensions of the Community Partnerships Director’s work connect to my work and interests?</i></p>
<p>[15 min] City Housing Authority Strategy Director</p> <ul style="list-style-type: none"> • Director’s role and relationship with City School District • Previous and current partnership work • Current capabilities and capacities • Challenges, problems of practice, opportunities • Clarification and discussion 	<p><i>What is scope of authority of the Housing Authority Director? Am I confident that this person knows how to partner with others effectively and respectfully? What is the scale of possibility for partnering? What dimensions of the Housing Authority Director’s work connect to my work and interests?</i></p>
<p>[15 min] State University STEM Education Researchers</p> <ul style="list-style-type: none"> • Expertise and interests • Previous and current partnership work • Current capabilities and capacities • Challenges, problems of practice, opportunities • Clarification and discussion 	<p><i>What interests and values do I share in common with the researchers? What expertise do they have that complements my own, and vice versa? Am I confident that this person knows how to partner with others effectively and respectfully? What is the scale of possibility for partnering? What dimensions of the researchers’ work connect to my work and interests?</i></p>
<p>[20 min] Discussion of potential jointly pursued activity</p> <ul style="list-style-type: none"> • What do you need for a partnership to work for you, and what limits do you have? • What interests you most in someone 	<p><i>What conditions need to be met by the potential partners—institutionally and personally? What activities could be pursued jointly with little investment, prior to committing to a full partnership?</i></p>

else's work?	
[10 min] Next steps	<i>What small actions could we each take? Should we meet again?</i>
[10 min] How to name or label our activity for 2-3 audiences or stakeholders	<i>How would each of the participants respond to others in their organization when asked, "What was that meeting on your calendar about?" How are the participants framing the conversation for their own organizational audiences, and whom do they need to answer to in their organization? How can I adopt some of their framing? What common language is the group developing?</i>

Tool 3B: Email invitation to a meeting exploring partnership

Partnerships can be explored even when individuals do not share a history and when a specific project does not present itself. Through contacts in your professional network, you can identify potential partners based on their disposition for partnership and their degree of authority within their institutions. Invitations for exploratory meetings should be framed to be enticing in some way and to establish the generative nature of a meeting, rather than a more common setup of a pitch for a project made by one individual to others.

Below is an email the school district Science Manager, referenced in Tool 3A, used to recruit potential partners to an exploratory meeting. A respected and influential regional science education service provider gained commitments from school district superintendents to convene their leadership teams at an event for facilitated planning of transitions to the Next Generation Science Standards (NGSS). The various districts' science curriculum leaders valued this opportunity to garner support for science education initiatives internally, but the Science Manager leveraged the event to explore external partnerships. Contrary to the case in Tool 3A, the Science Manager had no experience working with the people he invited. He relied on a trusted colleague to identify the right people and to broker introductions, which foregrounded his invitational email.

Use the study questions at the end to consider how you could recruit potential partners to a similar exploratory meeting.

To: City Department of Education and Early Learning School Partnerships Manager and Summer Programs Manager, City public library Digital Learning Manager and Community Partnerships Director, School District Community Partnerships Director
From: School district Science Manager
Subject: NGSS event at Logan Education Center

Hi everyone,

You may have heard about the event hosted by the Logan Education Center, described in the attached flyer, and Rose mentioned that I'd be contacting you in her email introducing us last week. I'd like to invite you to join me if you're interested.

Rather than assemble my regular science curriculum & instruction team for this event, I'd like to think outside the typical district box and engage with community partners like you to identify how we might coordinate our work for youth with respect to NGSS. I'll also admit, as I said to X, that I'm interested in forming a team for the event that would be stimulating to work with for the day—X said you fit that bill! My hopes for our team discussions:

- *For us to have common understanding of how NGSS is different from previous science standards and why NGSS is important for our youth*
- *For you to learn the school district's vision, plans and current activities supporting NGSS transitions*
- *For me to learn your ideas, plans, activities—or questions—for supporting youth in engaging with NGSS*
- *For us to jointly identify how we might coordinate our work supporting youth in science and engineering*

Let me know if you're interested in joining me. I'm really looking forward to learning from each other and exploring opportunities to support each other's work for youth!

Thanks,

Study guide questions

- The invitees were recommended by a colleague based on their scope of authority in their institutions and disposition to partnerships. What dispositions in partners are important to you? Which of your colleagues or contacts are good brokers for initiating contacts with potential partners?
- What might the recipients of the email find enticing about the meeting, and how does the invitation convey this? What would be interesting and enticing to people you would contact for potential partnership?
- How would you describe the tone set for the meeting? What tone would you want to set, and how would you do that in an invitation?
- In what ways would you want an exploratory meeting to differ from typical meetings with external institutions in your context, and how would you frame your different intentions in an invitation?
- How would you prepare your team to productively engage in an exploratory meeting, after an invitation is successful?