

Ethical Leadership in Polarized Times: A Brief-Cases Suite *“By the Book” Facilitation Guide*

Presented by EdEthics @ HGSE



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To cite this resource:

O’Brien, S. (2025). Ethical Leadership in Polarized Times: A Brief-Cases Suite: Facilitation Guide. Justice in Schools. <https://www.justiceinschools.org/ethical-leadership-polarized-times-brief-cases-suite>

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Introduction

Building and district leaders in K-12 education in the U.S. regularly face ethical dilemmas in their work. Schools and districts are complex ecosystems where diverse and often conflicting viewpoints and values must coexist. Leading such spaces is challenging. In times of intense social and political polarization, this work grows yet more challenging, as it becomes harder for communities to find commonalities across many different perspectives and beliefs.

This resource aims to provide support for this challenging work. The collection presented here is adapted from the normative case study (NCS), a tool developed by Professor Meira Levinson as part of her work with the EdEthics initiative. NCS narratives focus on everyday ethical challenges for which it is difficult or even impossible to realize all important values and principles at once. This suite of normative “brief-cases” exists to help educational leaders, particularly those at the district level, think through the ethical dilemmas that feel particularly salient in polarized times.

Short (approximately one page), accessible, and empirically-researched, the brief-cases in this suite provide fictional accounts of real ethical dilemmas faced in districts across the United States. These cases help educational leaders grapple with important ethical questions, including:

- How can educational leaders make decisions grounded in their personal, professional, and organizational values in the face of challenges exacerbated by political and social polarization?
- How can educational leaders make values-based decisions in communities that disagree on which values to prioritize and/or how to put values into action?
- How can educational leaders think through the ways that policy decisions communicate institutional values—both implicitly and explicitly?

This suite includes four brief-cases, tips for running normative case study discussions, a discussion protocol with additional materials for each case, and graphic organizers for discussion participants. These materials make it easy for instructors and professional learning providers to run both one-off discussions and full arcs of learning with current and aspiring educational leaders.

This guide provides all the information needed to run discussions about the brief-case “By the Book.”



By the Book

BRIEF-CASE

Sara O'Brien and Meira Levinson

<https://justiceinschools.org>

The Centerville Public Schools serve a middle-class district about twenty miles from the nearest major city. As part of their Portrait of a Graduate, approved by the Board of Education, the district strives to educate students to become “thoughtful, ethical, and engaged civic leaders.” However, at Centerville High School, some faculty members have expressed concern about political partisanship at the school. While the metropolitan region is politically diverse, with about equal percentages of Republicans and Democrats and a majority identifying as “Independent,” both Centerville and the student population at CHS lean Democratic. Perhaps as a result, conservative students rarely speak up in class discussions about controversial or political topics.

Mr. Jackson, the head of the English department, is particularly troubled by political polarization he sees on campus; many students are demonizing not only Trump but also Trump voters, despite teachers’ best efforts to create classrooms that welcome diverse viewpoints. So Mr. Jackson proposes building on the existing mission of the school and of the English department, which strives to provide both windows and mirrors through literature, by making J.D. Vance’s memoir *Hillbilly Elegy* required summer reading for all incoming ninth graders.

Pushback to his suggestion is swift. Within the department, some teachers argue that the district’s values preclude them from giving a platform to authors who espouse racist, xenophobic, and other hateful views. One teacher also points out that many writers from that part of the country have critiqued the book for reinforcing stereotypes about “backwardness” in Appalachia.

However, other teachers point out that while Vance espouses hateful views now, they don’t form a significant part of his memoir. Furthermore, they argue, including the book brings in a conservative author through a text that helps build empathy for people who are economically and culturally removed from the students.

Word of the suggestion leaks out, and the controversy increases. A group of students joins together to create a petition demanding that the book be removed from consideration; it has been signed by about a quarter of the student body. Meanwhile, conservative students are speaking to guidance counselors, English teachers, and other faculty to say they already feel like outsiders on campus and this latest suggestion that conservative voices have no place at the school deepens their feelings of isolation.

Parents have also weighed in to the school principal, Dr. Hall, and the superintendent. While some have voiced their anger that the district is even considering Vance’s book as required summer reading, others are angered by the pushback. After all, Vance is the country’s vice president; why shouldn’t his book have a place in the curriculum? Doesn’t one of the senior electives read *Dreams from My Father*, by Barack Obama?

Mr. Jackson is unsure whether to proceed with his plan, but he needs to place orders for summer reading in the next week in order to distribute books on time. While text selections are generally made at the department level, Mr. Jackson turns to Dr. Hall for advice, knowing that she’ll have to deal with the community response. She in turn calls the superintendent, who has already been fielding community

feedback. They know that some community members will be unhappy no matter what they choose and agree to make the decision together. Should they make *Hillbilly Elegy* required summer reading for ninth grade?

To cite this case study:

O'Brien, S. & Levinson, M. (2025). By the Book. *Justice in Schools*.
<https://www.justiceinschools.org/ethical-leadership-polarized-times-brief-cases-suite>

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Planning for Normative Case Discussions

While normative case studies (NCS), including these brief-cases, share similarities with other case studies used in educational settings, they do have distinct features. This facilitation guide draws out some of those unique features and offers concrete guidance for running NCS discussions. Before you begin exploring the case-specific facilitation materials, take some time to read through these guidelines for leading conversations about NCS.

Determining Goals for Normative Case Discussions

A key goal of NCS discussions is to unpack challenging ethical quandaries and surface the many competing values at play in the dilemmas raised by the case. Discussion participants should know that the goal of the discussion is not to generate the “right” answer to any dilemma or even to come to a consensus about the “best” solution. Rather, groups should explore what makes each dilemma so complex, the values that possible avenues of action might uphold, and the potential compromises or tradeoffs that might accompany different actions. The issues raised in each case are challenging, and there are, in fact, no easy answers to the questions that will come up during discussion. Indeed, your group is likely to disagree about the “best” possible course of action in a case. Both participants and facilitators should expect non-closure and ambiguity. In order to support this learning, begin by setting discussion norms that will support these types of discussions.

Setting Group Norms

Setting clear norms is essential for any group discussion, but particularly important for NCS discussions. NCS ask participants to unpack their own values and belief systems, then to discuss those values with others who might disagree. Such conversation across lines of difference requires that discussants feel safe and supported. Clear norms, fairly enforced by the facilitator, can create the sense of safety and support that group members need to fully engage and learn from each other.

Clear and consistent discussion norms are particularly important for this brief-case suite. The cases in this suite can raise a lot of emotions—all along the political spectrum. Make sure that you have clear community agreements and norms in place before beginning discussion of these cases, as well as a clear plan for how to respond if someone violates those norms.

We particularly like [Leveraging Norms For Challenging Conversations \(2016\)](#), developed by Whitney Polk in collaboration with Dr. Aaliyah El-Amin at the Harvard Graduate School of Education. This resource offers in-depth advice for creating and upholding norms, including clear language to use in case of norms violations. In the box below, you’ll find norms that the EdEthics team regularly uses, adapted from Polk and El-Amin’s work; however, you may have your own set of norms that work well for your group.

- **Respect for Self and Others**
(e.g., Actively Listen, Maintain Confidentiality, and Challenge Ideas, Not People)
- **Acknowledge the Different Backgrounds and Experiences of Others**
(e.g., Consider the role of your identities and power dynamics)
- **Accept Challenge and Anticipate Discomfort**
(e.g., Push Your Thinking, Hold Yourself and Others Accountable, and Contribute to the Conversation)
- **Keep an Open Mind**
(e.g., Allow for Growth, Listen Before Responding, and Stay Engaged)
- **Embrace Uncertainty and Non-Closure**
(e.g., Don't expect all questions to be answered)

Acknowledging Emotions in the Discussion Space

As you will see in the General Discussion Protocol on page 16, we recommend starting the case discussion by acknowledging that the case may inspire emotional reactions. We suggest giving people time to reflect on their emotional state and the ways it might impact their perceptions of the dilemmas in the case and the values at stake. A tool that we like to pair with this work is Glenn Singleton's [Courageous Conversations Compass](#), which invites people both to reflect on the ways that they enter into a challenging conversation and to understand that others may enter such conversations differently. If you believe that a case might lead to highly-charged discussion with your group, it's particularly important to take that time for personal reflection, without or without the Compass.

You may also find that these cases raise strong emotions for you as a facilitator. If that's the case, you might take some time to think about your own emotions before leading a discussion. [This resource from HGSE is a helpful tool for reflecting on your personal "triggers,"](#) along with sentence stems for facilitators to use in difficult discussions.

When cases do raise strong emotions, one way to keep discussion productive is to focus deeply on the world of the case. After all, case studies are helpful in no small part because they provide a safer distance for talking through challenging dilemmas than talking about one's own challenges allows. Consider helping your group stay within the world of the text by asking participants to do a "[character/stakeholder deep dive](#)" for the values portion of the case discussion. Ask each person to choose a character or stakeholder group from the case to whom they had a strong reaction, perhaps because they identified with them or perhaps because they strongly disagreed with them. Participants should think about what motivates that character or stakeholder group: What values are important to them—and how might they define those values? What practical implications inform their thinking? Are there aspects of their role(s) that may influence how they see the dilemmas? Then, open up

the discussion, but keep the focus on the characters and/or stakeholders. Did any group members choose the same character but view them differently? Do any characters share the same value but define it differently?

Making Decisions with Incomplete Information

The brief-cases in this suite attempt to explore ethical complexity in a small space. Necessarily, they provide incomplete information about the fictional stakeholders and districts they portray. Often, the ambiguity is intentional, allowing readers to consider how the scenario might play out in their own districts and to open discussions about how the dilemmas in the case might change with different demographic information. (For more details, see Case-Specific Supplements starting on page 23.)

For some groups, working with incomplete information can be challenging, potentially even stymying discussion as participants insist they cannot make any decisions in such uncertainty. For other groups, discussion can quickly move to listing what information is missing in the case without analysis of how that missing information would inform the dilemmas, the values at stake, and the range of potential solutions. In both cases, the role of the facilitator becomes increasingly important in steering conversation to *why* the missing information should matter to the leaders in the case. It can also be helpful to remind groups that educational leaders often operate in conditions of uncertainty; it's rare for anyone to make decisions with perfect knowledge of all facts, beliefs, viewpoints, and opinions.

Recommendations for Virtual Facilitation

NCS discussions can take place in-person or virtually. The EdEthics team has led many discussions in both formats. If you are facilitating the pathway virtually, consider these logistical questions:

- Are you limited by time? (Free versions of virtual meeting platforms may only give you 45 minutes of meeting time.) How will the timing impact your planning? Can you ask participants to read the brief-case before your meeting?
- Are you comfortable assigning groups, using the chat features, sharing screen, and generally navigating the software?

Virtual Norms

For virtual spaces, it's still important to use the discussion norms that you would use for an in-person discussion. You might also consider adding virtual norms to improve the group experience (e.g., "Keep on mute when the speaker is presenting."; "Keep your camera on."; "Use the 'hand raise' feature when you want to participate.").

Ways to Share Virtually

In virtual sessions, we often use the "waterfall" approach with the chat feature: we have participants type their responses to a particular question into the chat without submitting, and then all press "Enter" at the same time

so that the responses appear together in the chat at the same time. Then we can ask questions based on the patterns that we see, or we can ask individuals to share more of their thinking based on their responses.

Breakout Groups (Optional)

As with in-person discussions, 6-12 people is a good size for a virtual NCS discussion group. If your group is significantly larger, you might want to use breakout rooms to create smaller groups. Consider the following questions if you take this route:

- How well do the group members know each other?
- Do you have more than one facilitator to guide breakout groups? Could you appoint some facilitators in different breakout rooms, even if they are not official facilitators?
- Will anyone stay behind in the main room in case someone is kicked off Zoom and needs to come back?
- If you are leading a virtual discussion with breakout rooms, make sure that participants have the slideshow link so they can access the questions without you.

Ultimately, when considering the use of breakout rooms, reflect on ways you can maintain discussion norms even within different groups to ensure your learners have a productive and meaningful NCS discussion.

General Discussion Protocol

Supplement this protocol with the case-specific guide below.

Time: 60-75 minutes. Adjustable with modifications.

Materials

- Case study
- Case supplemental guide
- Some way to write (pen/paper, laptop, tablet)
- [Participant Packet](#) (optional)
- [Expert Video Commentaries](#) (optional)

Session Agenda

- Part I. Introduction and Norms (5-10 minutes)
- Part II. Reading the Case (5 minutes)
- Part III. Reflection (5 minutes)
- Part IV. Group Discussion (45-60 minutes)
- Part V. Reflection and Takeaways (5-10 minutes)
- Part VI (*Optional*). Feedback (2-5 minutes)

Before the Discussion	
<p>Consider your audience and the goals for your discussion.</p> <ul style="list-style-type: none">• Who is your audience? How well do they know each other?• Why is this group coming together? <p>Determine which materials you will need.</p> <ul style="list-style-type: none">• Will you distribute the case before the discussion? (Is it reasonable to expect participants to read it before the event?)• Will you devote time during the event for participants to read the case?• Are there any other materials that you wish to distribute alongside the case (i.e., relevant local policies, additional articles on the issues at hand, etc.)? <p>Determine group size(s). We recommend ideally 6-12 people per discussion group.</p> <ul style="list-style-type: none">• Will you run one whole-group discussion yourself?	<p>Notes: <i>When we run case discussions in university courses, we generally ask learners to read the cases—and any accompanying sources—before the discussion. When running professional development with in-service educators or other professionals, we sometimes ask our participants to read the case in advance, but we also often use time at the start of the session for participants to read the case.</i></p>

<ul style="list-style-type: none"> • Will you break a large group into smaller groups? Will those groups be self-facilitated, or will you require a team of facilitators? 	
<p>Part Ia. Introductions (5 minutes)</p>	
<p>Ask each member of the group to share their names (and pronouns, if desired), along with any additional information that may be useful (professional role for educators, school/district size or demographics, etc.). You may also include an icebreaker question for community building.</p>	<p><i>Notes: For virtual discussions, we often have discussion participants call on the next person to help the introductions run more smoothly.</i></p> <p><i>Modifications: If all members of the group already know each other well, you can omit introductions.</i></p>
<p>Part Ib. Discussion Norms (5 minutes)</p>	
<p>Share a list of discussion norms for the conversation with participants. Once participants have had a chance to review the list, ask whether they wish to discuss or amend any norms or add any new ones.</p>	<p><i>Notes: You can find a list of norms that we often use on page 13.</i></p> <p><i>Modifications: If the group meets regularly, you can likely do a quick review of existing norms here.</i></p> <p><i>As these cases can raise strong emotions in readers, another tool that can be helpful to use alongside discussion norms is Glenn Singleton’s Courageous Conversations Compass.</i></p>
<p>Part II. Reading the Case (5 minutes)</p>	
<p>Allow time for participants to read the case (or review it if they’ve read before the session). Given that people read at different speeds, it can be helpful to provide your learners with some questions to think about and make notes on once they’ve finished the case. (See below for ideas.)</p>	<p><i>Modifications: You may instead choose to read the case aloud.</i></p>
<p>Part III. Reflection (5 minutes)</p>	
<p>Give participants a few minutes to reflect on their responses to the case. Choose one or more of the following questions:</p> <ul style="list-style-type: none"> • What emotions did this case raise for you? How might those feelings impact your entry into the discussion? • What important information is missing from the case? How would that information change your thinking 	<p><i>Notes: This moment of reflection before the discussion serves several purposes. First, these cases can raise strong emotions in readers, so it can be useful to acknowledge and reflect on those emotions before diving into discussion. Second, because these cases are so</i></p>

<p>about the key dilemmas?</p> <ul style="list-style-type: none"> • What assumptions do the characters in the case seem to be making? Did you find yourself making assumptions or filling in missing details with information from your own experiences? <p>Depending on the group, you might ask participants to share some part of their response with a partner or with the group.</p>	<p><i>short, they necessarily are light on details, making it easy for readers to fill in those gaps themselves. Thus, it can be helpful to name those gaps and potential assumptions explicitly. However, keep the focus on <u>why</u> those missing details would make a difference, rather than just listing them.</i></p> <p>Modifications: <i>If this is a group that has worked with normative brief-cases before, you might be able to skip explicit reflection, as it should become more automatic for readers the more they work with the tool.</i></p>
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Part IVa. Discussion: What are the dilemmas? (10-15 minutes)

<p>Before diving into the discussion, establish a common understanding of the term “dilemma.” We share the following definition:</p> <ul style="list-style-type: none"> • Dilemma: A situation where there is no one right answer, and it is hard (even impossible) to realize all important values and principles at once. <p>Begin the actual case discussion by asking participants to surface the dilemmas in the case, using the following questions:</p> <ul style="list-style-type: none"> • What are the dilemmas in this case? • For whom are they dilemmas? <p>Potential follow-up questions:</p> <ul style="list-style-type: none"> • Which character faces that dilemma? • We haven’t yet talked about [this character]. What dilemmas do you see them facing? • Dilemmas can be practical, like specific choices to be made by a particular character or group in the case, or big philosophical questions, such as about the purpose of schooling, or anything in between. Do you see any dilemmas [at a more abstract or specific level]? • Are there any people or a group of stakeholders who don’t feature in the case by name but who might be facing dilemmas because of what’s happening here? <p>Find more follow-up questions in the case-specific supplements.</p>	<p>Notes: <i>We often ask discussion participants to start by naming the most obvious dilemma, the one that’s likely on most people’s minds. Then we move to exploring dilemmas within that main dilemma and to looking at other dilemmas that might not be so obvious. You might also clarify for the group that dilemmas can be specific decisions to be made and/or broader philosophical questions.</i></p> <p><i>In these cases, there are dilemmas for the leadership team, which are often mentioned the most. But try to encourage the group to think about dilemmas for individual characters, as well.</i></p> <p>Modifications: <i>If you are short on time, you can shorten this section or even present the group with a list of dilemmas that they can add to. But make sure that the group is looking at dilemmas beyond the practical choice to be made in the case.</i></p> <p>Facilitator Tips: <i>Sometimes people don’t really describe a dilemma. If that happens, see if there’s a way for you to reframe their comment in terms of a dilemma. Be ready</i></p>
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	<p>to redirect participants who offer solutions to the dilemmas during this part of the conversation. Let them know that we'll talk about what the characters should do later in the conversation.</p>
<p>Part IVb. Discussion: Why are these dilemmas? (10-15 minutes)</p>	
<p>Move the group into the next part of the discussion by asking:</p> <ul style="list-style-type: none"> • Why are these dilemmas? • What values or principles are at stake? • What practical and/or policy considerations are at stake? <p>Potential follow-up questions:</p> <ul style="list-style-type: none"> • Do people disagree about which values matter, which should take precedence, or how they apply in this case? • Do people disagree about which considerations are relevant, which should take precedence, or how they should be addressed in this case? • Which factors are influencing relational trust between the different stakeholders? • Who has the most to gain or lose in [this dilemma]? • Which relationships with outside groups and/or different stakeholders should leaders in the case be considering with particular care? <p>Find more follow-up questions in the case-specific supplements.</p>	<p>Notes: You may wish to provide discussion participants with a list of possible values that might be at stake in the case. See the case-specific guides for some ideas.</p> <p>If participants want to discuss solutions, consider sharing a reminder: "If you feel yourself going quickly to solutions, either in your mind or especially in discussion, try to pause that instinct. We have found the kind of slow and deliberate thinking these case studies invite is the value of this exercise. At the end of the discussion, we can reflect on how it felt to delay the decision-making." Then be sure to take the time to reflect on this topic at the end of the discussion!</p> <p>Modifications: If you are short on time, you can shorten this section to 10 minutes. But we recommend giving the group as close to 15 minutes as possible.</p> <p>You might consider having participants split into pairs or trios for the first part of this section. When opening up discussion to the larger group, you could ask one of those pairs to share first, rather than just opening up the question to the group. (Think of this as "warm calling.")</p>
<p>Part IVc. Discussion: What <i>might</i> be done in this case? (5 minutes)</p>	
<p>Have discussion participants brainstorm <i>possible</i> courses of action that might be taken in the case. These can address any of the dilemmas raised and may be explored within the case or be totally novel. Use the following question:</p> <ul style="list-style-type: none"> • What choices are available, and to whom? 	<p>Notes: You could give participants time to brainstorm or discuss in pairs before opening this question to the group, if time allows.</p> <p>To save time, you can also provide a list of</p>

<p>Potential follow-up questions:</p> <ul style="list-style-type: none"> • How does each of these choices frame and address the dilemmas? • For each choice, what is gained? What tradeoffs might come with this choice? • How might power dynamics impact the decision-making capacity of a character? • How would this decision affect the most vulnerable? 	<p><i>potential choices to the group and ask them to add any that they'd like to see.</i></p> <p><i>You may need to remind your group that the goal at this stage is simply to list possibilities about what might be done, not to look for the best possible answer.</i></p> <p><i>It can be helpful to record the possible choices on chart paper or in a digital medium to create a common "text" that can be used in the next section.</i></p> <p>Modifications: <i>If you are pressed for time, omit this section and instead move to the next question of what should be done.</i></p>
<p>Part IVd. Discussion: What <i>should</i> be done in this case? (5-10 minutes)</p>	
<p>Ask participants to consider what <i>should</i> be done in the case, using the following question:</p> <ul style="list-style-type: none"> • What do you think should be done in this case, and by whom? Why? <p>Potential follow-up questions:</p> <ul style="list-style-type: none"> • Where would you focus your action(s) first? What risks would you be accepting through this course of action? • What systems or routines would you need in place to follow through with a particular action? • How should this decision be communicated? • How would this decision affect the most vulnerable? • Who stands to gain from this decision? Who stands to lose? • What additional information might the leaders in the case want to learn before they make their decision? <p>Find more follow-up questions in the case-specific supplements.</p>	<p>Notes: <i>Remember that there is no one "best" course of action in these cases (though some courses of action are definitely better than others, and some actions would be wrong to take). Participants should not be looking for the "right answer." Be sure to ask people to explain why they believe that the course of action they chose should be taken.</i></p> <p><i>If you have a list of brainstormed options, it can be helpful to annotate that list with the values each option upholds.</i></p> <p><i>Sometimes groups can be reluctant to commit to a potential course of action because of the missing information in the case. If this happens, you can ask what they would need to know before making a decision—and, crucially, <u>why</u>. But it also helps to remind groups that we're constantly making decisions in conditions of uncertainty and that there's value in talking through decisions even without all the information we want.</i></p>

Part V. Reflections and Key Takeaways (5-10 minutes)

Before ending the discussion, ask participants to reflect on the case and their experience discussing it. Ask participants to complete a quick write (2 minutes) on one of the following questions:

- How did your own experiences and identity influence your views of the dilemmas in the case? How will you think about this influence in the future?
- What missing information will you seek out as you confront ethical dilemmas in your own school/district?
- What did you learn about yourself as a leader and the values you bring to your role?
- What did you learn about your institution, organization, or broader context from this case and/or discussion?
- What have you learned from talking about this case that might apply to other ethical dilemmas in educational leadership?
- What have you learned from this case and/or discussion that you'd like to take back to your own classroom/school/district?
- What value(s) are you thinking about in a new way or for the first time?
- What lingering questions will you take away from this discussion?

If you have time, consider asking participants to share some part of their reflection with a partner or the group.

Find more follow-up questions in the case-specific supplements.

Notes: *It's nearly impossible that you'd have time to ask all of the reflection questions listed here! Think about which questions will be most helpful for the group that you're facilitating and choose one or two accordingly.*

You may want to allow participants the option to pass (opt not to share) during this final section, depending on the level of comfort in the group.

If participants are comfortable sharing their ideas with the whole group, open the floor to sharing.

Modifications: *If this group is coming together for a specific purpose, you may want to tailor the reflection to that purpose. In the past, we have used this reflection time for disciplinary or grade-level teams to chat about implications for their classrooms, for example. We have also used this time for teachers across a district to reflect on the ways the case discussion helps them think about new policies being implemented. In our experience, discussion participants find this chance for reflection very meaningful—be sure to leave enough time for it in your discussion.*

Virtual Modification: *For a virtual discussion, a waterfall technique could work well here. Have each person type their sentence/question into the chat, but not press enter. Then, have everyone press enter at the same time. You can find other virtual modifications we use on pages 14-15.*

Part VI (Optional). Space for Feedback (2-5 minutes)

If you would like to provide a space to give feedback at the end of each session, ask participants anonymously to provide positives (+) and potential changes (deltas Δ).

In person, you can use sticky notes, paper, or an online form. Virtually, consider using an online form.

***Notes:** After collecting feedback, reflect on the feedback provided. Some feedback might suggest a change in norms or a different structure. Others might indicate that people feel challenged and are experiencing growth.*

If this discussion is part of an arc of learning, consider how you can use the feedback as you plan the next session.

“By the Book” Case-Specific Supplement

The discussion questions below can be used as part of the generic protocol, serve as reflection questions, or provide prompts for assignments in university coursework. In addition to these materials, we have [a collection of short video clips](#) featuring experts discussing educational leadership, which may be used to spark further discussion on the dilemmas in these cases.

Essential Questions:

- How can educational leaders make values-based decisions in communities that disagree on which values to prioritize and/or how to put values into action?
- How should school and district leaders work together to make collaborative values-based decisions in polarized communities?

Summary:

A school district faces tumult when the high school English department chair suggests making J.D. Vance’s memoir *Hillbilly Elegy* required summer reading as a way to bring greater ideological diversity into the curriculum.

Facilitation Notes:

- We have found that this particular case raises strong emotions. Make sure to build in time for your group to process those emotions before discussing the case. See the general facilitation guide for questions to use.
- Some readers make the assumption that *Hillbilly Elegy* would be the only “required summer reading for all incoming ninth graders.” However, the case never states how many books students are assigned to read over the summer, nor how many of those books are required. If your group makes this assumption, try asking them to consider how their views on the dilemmas, or the possible solutions they see, would change if *Hillbilly Elegy* might be one of several books students were required to read, rather than the only one.
- This is the only case in the suite that places a hard deadline on the central choice presented by the case: summer reading orders are supposed to be done next week. Be sure that the group considers this time pressure in both the dilemmas and their potential solutions, even if it just means that they look into delaying adoption of the book until the following summer. But adopting this book—or not—is just one potential short-term solution. Encourage the group to think about other short-, medium-, and long-term solutions to the larger dilemmas that Centerville is facing.

Case-Specific Questions:

Dilemma Questions:

- This is a department-level decision that's reverberating at the school and district level. What are the different levels of leadership you see in this case? What dilemmas do leaders face at each of these levels?
- How does the role *Hillbilly Elegy* would play as summer reading contribute to the dilemmas in the case? How might those dilemmas be different if the book were part of the school-year curriculum?
- There's disagreement in the case about whether *Hillbilly Elegy* should be evaluated based on the content of the memoir or the author's political career. How, if at all, should educators distinguish between art and artist when deciding what to include in the curriculum?

Values Questions:

- While many different stakeholders in the case share opinions on *Hillbilly Elegy* and its place at Centerville High, it's unclear how many have read the memoir, either for pleasure or with an eye to the curriculum. What responsibilities to become deeply familiar with the materials, if any, do different stakeholders have before weighing on curricular changes?
- Both those advocating for and those opposing the inclusion of *Hillbilly Elegy* are concerned about inclusivity and belonging. What do those values mean to the different stakeholders in the case?

Solution Questions:

- At the end of the case, several different leaders—at different levels of leadership—are attempting to make a decision about the book together. How might that group share their decision-making power? If you would weigh one voice more heavily than the others, why would you do so?
- Many different stakeholders share their views in this case: students (both liberal and conservative), teachers, and parents. How should the leaders take these—often conflicting—views into account as they make a decision about the book?
- If Centerville leadership does decide to add *Hillbilly Elegy* to the curriculum, what additional training and/or resources might different stakeholders need (faculty, staff, students, families, etc.)?

Reflection Questions:

- As a Centerville leader, what would you want to learn before making a decision like adding *Hillbilly Elegy* as required summer reading? How would you go about gathering that information quickly and effectively?

Potential Values at Stake:

Diversity, Inclusion, Freedom of Speech, Fairness, Critical Thinking, Truth, Empathy, Democracy

Appendix I: Participant Worksheets

At EdEthics, we find it's helpful to provide our discussion participants with graphic organizers to help them track their thinking during case conversations. [Click here to make a copy of our participant packet](#), which you can customize for your group's discussion.

Appendix II: FAQs

General Facilitation Tips and Guidelines

- If you split the larger group into pairs or trios, you can “warm call,” or call in participants you heard making thoughtful comments in their smaller groups. You can also ask people to share something their partner said. If someone has been quiet throughout the discussion, you can gently invite them in by saying something such as, “[Name], do you have anything you’d like to share?”
- People often want to “solve” the dilemma or talk about what the characters should do right away. If this happens, remind participants that they will get to talk about taking action. But we start the discussion by naming a variety of dilemmas, which ultimately helps us think about possible pathways for action later.
- If participants get stuck in thinking about solutions before it’s time to talk about them, try to name the values you see them thinking about with statements like, “It sounds like you’re thinking about the importance of students’ psychological safety in the case. Does that seem right? How are the characters in the case thinking about that value?”
- If participants are moving far from the case and the dilemmas it raises (like talking about their school instead of the case), you could bring them back by asking the group a question specifically about the characters or details in the case. See the “follow-up questions” throughout this guide for some ideas.
- Make notes about points you’d like to follow up on with participants. Ask questions to help them elaborate on their thinking. Listen carefully for dilemmas they may be having trouble articulating and try to rephrase them.

What if nobody is talking?

- You can always have participants turn and talk to a partner (or in a trio if the numbers are uneven). You can also have participants write for 1-2 minutes in their packet to generate ideas and then ask someone to share.
- You can turn back to the text of the case if people are quiet. Ask the participants to find a sentence or two that really resonated with them or a point of view that they didn’t agree with. Then you can either have them start sharing these quotations with the whole group and explaining why they chose them, or you can have them share with a partner before opening up discussion to the whole group.

What if the conversation goes sideways?

- Disagreement is ok! Rather than trying to get the group to consensus, use the questions from the protocol to pinpoint exactly what participants are disagreeing about. Does it have to do with a difference in values? Past experiences impacting their decision-making? Even if participants agree about what should be done in the case, are they all prioritizing the same values in choosing that solution? (They probably aren't!)
- Feel free to revisit the norms if the discussion starts getting uncomfortably heated. You could try saying something like, "I understand that these topics can be difficult to talk about. An important expectation for this conversation is that we _____. Please keep this expectation in mind moving forward." See [Leveraging Norms For Challenging Conversations \(2016\)](#) for more advice on upholding norms.
- If participants are making statements grounded in prejudice or misinformation, it's important to address those in the moment to keep the trust of the group. To kindly correct them, use this helpful line: "That's a common misperception. I can see why you think that. Let me share some other information with you..."
- Help participants feel heard if the conversation gets heated. Try restating the ideas with phrases such as, "Here's what I'm hearing..."
- If participants keep talking about themselves and their school instead of the case, return to the text. Ask them to choose a character they identified with and determine which values are important to that character. Alternatively, ask them to choose a quotation that resonated with them or that they disagreed with (see note above for more about this facilitation move).

What if people won't engage with dilemmas?

- Be on the lookout for these pitfalls of normative case study discussions.
 - *"Magic fairy dust" solutions:* If participants try to sidestep the dilemma by changing the facts of the case, gently remind them of the facts in the case. (For example: "It would be great if the town of Franklin found enough money to keep both Penniman and Clayton open, but the case states that they've tried to close their budget shortfall and haven't succeeded. We need to work within that financial constraint.") The real world is messy, and the cases reflect that messiness. After all, educators are constantly making decisions in imperfect situations with incomplete information.
 - *Denying the dilemma:* Comments like "there was no dilemma for me here" or "the obvious answer is..." can really shut down the discussion. It's important to address the multiple ways of viewing the case so that other participants don't feel their different opinions are invalid. You can remind participants that there are many ways of viewing the case and resurface the dilemmas brought up at the beginning of the discussion.

Additional Facilitation Resources

- Our [Facilitator Responses for Controversial Conversations](#) offers specific language to use when responding to challenging moments, from one participant dominating the conversation to groups debating the issues rather than discussing them with an open mind.
- This [self-assessment can help you understand your strengths as a facilitator and what you can do to strengthen the community within your group](#), even if the conversation becomes heated.
- Learn ways to [meaningfully use a hot moment—a sudden moment of conflict or tension in a discussion— to advance learning](#) for your group.