

# Values-Driven Leadership: Facilitating Discussions on Ethical Decision-Making in K-12 Schools

## *Facilitation Guide*

Presented by EdEthics @ HGSE



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# Welcome to the Facilitation Guide

## **Values-Driven Leadership: Facilitating Discussions on Ethical Decision-Making in K-12 Schools**

At EdEthics, we believe that K-12 schools and districts are inherently values-laden spaces. Educators and educational leaders at all levels routinely rely on personal, professional, organizational, and community values when making decisions that impact students. However, there's rarely space and time for teachers and leaders to reflect on the ways that values inform their decision-making, learn more about the values that different stakeholders bring to the table, and discuss the ethical challenges that they face with others.

This lack of space is a particular problem for educational leaders, who often are trying to balance the needs of many stakeholders as they make decisions about not only longstanding ethical challenges (like the compromises inherent in making choices about budgeting or hiring) but also evolving dilemmas (like crafting AI policy or responding to increased polarization). With so many competing values, differing viewpoints, and necessary trade-offs to take into account, making values-based decisions—especially ones that impact entire schools, districts, and communities—isn't easy.

This pathway exists to support educational leaders in making those values-based decisions. By engaging with these materials, educational leaders can practice identifying ethical dilemmas, analyzing the tensions that make responding to ethical dilemmas so challenging, and crafting solutions rooted in their values. Each of the cases in this pathway helps leaders explore relatable, messy ethical quandaries in education and build the skills required to respond to dilemmas in their own practice.

The Values-Driven Leadership learning pathway collects five normative case studies (NCS). Short, empirically-researched, and written in accessible language, these NCS present realistic ethical challenges that both institutions and individuals face across a range of leadership roles. Along with the cases themselves, the pathway provides additional resources, reflection questions, and expert video commentaries to help school leaders, faculty, teachers, instructional coaches, principals, administrators, school board members, and other affiliates explore complex and nuanced ethical questions.

NCS do not lead participants to a single correct answer or a specific “aha!” moment. Rather, they are tools used to facilitate conversations about challenging topics and dilemmas so that participants understand and appreciate others' perspectives and deepen their capacity and inclination for reflection in ways that expand their thinking. This framing expands the scope of “good” decisions available to leaders facing ethical dilemmas.

While individuals completing the pathway will find plenty of food for thought, the pathway is best used for group learning. To that end, the EdEthics initiative has created this facilitation guide for instructors, professional learning providers, and others to facilitate discussion with current and aspiring educational leaders.

## Essential Questions

Here are the **essential questions** that you will explore in this pathway. Depending on the number of cases you decide to discuss with your group, you may not explore all these questions. Be sure to consult the case-specific guides below to determine the essential questions for each individual case.

### Essential Questions

- *What is values-driven leadership?*
- *How can educational leaders identify the values that are important to them, their stakeholders, and their institutions?*
- *How can educational leaders balance their many responsibilities to different stakeholders, including students, educators, parents, school board members, and the broader community?*
- *How can leaders help other stakeholders understand the ways that they use values to make decisions?*
- *How can educational leaders support educators and students in making their own values-oriented decisions?*

## Before You Begin

**Whether you're an instructor using this pathway in a course, a professional learning facilitator leading a series of discussions, or a lifelong learner hoping to engage in conversation with colleagues or peers, it's important to do some planning before you begin the pathway.**

### Consider Your Group

Start by thinking about your audience.

- Who will be a part of your group? If you are recruiting learners, how and to whom will you advertise this learning experience?
- Are your group members familiar with each other or meeting for the first time? What groundwork might you need to lay before the group is ready for potentially challenging conversations together?
- What do you know about your group members (e.g., their backgrounds, interests, educational experiences)? Do you need to learn more about their needs and goals before planning your pathway?

We ideally recommend a group size of 6-12 members for NCS discussions. For larger groups, it's helpful to break into smaller discussion groups. While it's ideal to have a dedicated facilitator for each small group, groups can also self-facilitate, with one main facilitator checking on the groups and overseeing the timing of the session.

## **Establish Your Goals**

There are many reasons why someone might engage in this pathway. Take some time to reflect on why engaging with educational leadership dilemmas is especially important for you and this group and on any outcomes that you hope to see after your discussion(s). Consider the leadership roles your group members hold. Communicate the goals so participants understand why this pathway is individually and/or collectively meaningful.

## **Make Logistical Decisions**

If you're an instructor using the pathway in a course or a professional learning facilitator using the pathway as part of regularly-scheduled sessions, you may already have most of the logistics figured out. Whether you're slotting this pathway into pre-existing learning opportunities or creating an arc of learning from scratch, here are some questions to consider:

- When, where, for how long, and how frequently will you meet with your group? (We recommend allotting at least 90 minutes per case discussion.)
- Do you have a pathway schedule or calendar that you can share with participants?
- What work will be done inside and outside of the meetings? (Allow for 2 hours if you plan to read the case as part of the meeting time.)

## **Get to Know the [Values-Driven Leadership Site](#)**

This facilitation guide is designed for facilitators of this pathway, providing “behind-the-scenes” tips for planning and running NCS discussions. In contrast, the Values-Driven Leadership site is participant-facing and ready to be shared with your learners.

The Values-Driven Leadership home page includes a framing video, links to each case page in the pathway, and some quotations on values-driven leadership from experts in the field. Each case page comes complete with key guiding questions, access to the case, additional resources, reflection questions, and expert video commentaries. Consider whether you'll have your group access cases through the pathway home page or whether you'll provide links to the case pages for the cases you'll be reading together.

# Planning for Normative Case Discussions

While normative case studies (NCS) 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 discussion protocol and case-specific facilitation materials, read through these general guidelines for leading conversations about NCS.

## Recommendations for Best Practices in Normative Case Discussions

The goal of normative case 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 for 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.

## Setting Group Norms

Setting clear norms is essential for any group discussion, but particularly important for normative case 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.

In the box below, you’ll find norms that the EdEthics team regularly uses, adapted from [Leveraging Norms For Challenging Conversations \(2016\)](#). This resource was developed by Whitney Polk in collaboration with Dr. Aaliyah El-Amin at the Harvard Graduate School of Education and offers in-depth advice for creating and upholding norms. Please consider the norms below as a starting point, since 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)

## 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 the following elements that may impact your virtual meeting.

### Logistical Considerations

- Are you limited by time? (Free versions of virtual meeting platforms may only give you 45 minutes of meeting time.) How will that limitation impact your planning? Can you assign readings and additional materials 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 Participant Contributions 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 and then all press "Enter" at the same time so that the responses appear together. 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, consider whether you 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 facilitators to 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?
- How will you ensure that participants have access to the protocol or discussion questions even when they're not in the main room?
- How will you maintain discussion norms even within different breakout groups to ensure you and your participants get the most out of the NCS experience?

## What's Next

While this resource has thus far focused on planning your overall pathway, the next sections will help you plan for individual discussions in the pathway. You'll find below:

- A General Facilitation Guide for all cases, which include specific guidance on timing and a detailed discussion protocol.
- Case-specific supplemental guides with tailored questions and more information about the additional resources available on individual case pages in the pathway.

# General Facilitation Guide

This guide is a general guide that can be used to lead discussion on all of the cases. Supplement this guide with the case-specific information and instructions on the Cases 1-5 supplemental pages below.

**Time:** 90 minutes. Adjustable with modifications.

## Materials

- Narrative case study or reader’s theater script
- Case supplemental pages
- Facilitation guide
- Some way to write (pen/paper, laptop, tablet)
- Participant packet (optional)
- Additional Resources on case-specific webpage (optional)
- Expert Video Commentaries on case-specific page (optional)

## Session Agenda

Part I: Introduction and Norms (5-10 minutes)

Part II: Reading the Case (10-15 minutes)

Part III: Group Discussion (50-60 minutes)

Part IV: Reflection and Takeaways (10 minutes)

Part V (*Optional*): Feedback (2-5 minutes)

<b>Case Discussion Facilitation Guide (for 90 minutes, with notes for modification)</b>	
<b>Before the Discussion</b>	
<p>Consider your audience and the goals for your discussion.</p> <ul style="list-style-type: none"> <li>● Who is in your group?</li> <li>● Why is this group coming together?</li> </ul> <p>Determine which materials you will need.</p> <ul style="list-style-type: none"> <li>● Will you distribute the case before the discussion? (Is it reasonable to expect participants to read it before the event?)</li> <li>● Will you devote time during the event for participants to read the case?</li> <li>● Will you encourage learners to read any additional resources with this case? Which ones will you assign and to whom? (<i>See the case-specific guides to see a list of additional resources and how they can contribute to the</i></li> </ul>	<p><b>Notes:</b> <i>When we run case discussions in undergraduate or graduate courses, we generally ask participants to read the cases—and any accompanying sources—in advance of the discussion session. 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 during the session for participants to read the case. Consider how you can maximize participation and learning for the group that you are working with.</i></p>

<p><i>discussions.</i>)</p> <ul style="list-style-type: none"> <li>• Are there any other materials that you wish to distribute alongside the case?</li> </ul> <p>Determine group size(s). We recommend ideally 6-12 people per discussion group.</p> <ul style="list-style-type: none"> <li>• Will you run one whole-group discussion yourself?</li> <li>• Will you break a large group into smaller groups? Will those groups be self-facilitated, or will you require a team of facilitators?</li> </ul>	
<b>Part Ia: Introductions (5-10 minutes)</b>	
<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, etc.). You may also include an icebreaker question for community building.</p>	<p><b>Notes:</b> <i>For virtual discussions, we often have discussion participants call on the next person to help the introductions run more smoothly.</i></p> <p><b>Modifications:</b> <i>If all members of the group already know each other well, you can omit introductions.</i></p>
<b>Part Ib. Discussion Norms (5 minutes)</b>	
<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><b>Notes:</b> <i>You can find a list of norms that we often use on pages 6-7.</i></p> <p><b>Modifications:</b> <i>If the group meets regularly, you can likely do a quick review of existing norms here.</i></p>
<b>Part IIa: Reading the Case (10-15 minutes)</b>	
<p><b>If your learners haven't yet read the case study</b>, allow time for them to do so now. Given that people read at different speeds, it can be helpful to give your learners some questions to think about and make notes on once they've finished the case.</p>	<p><b>Modifications:</b> <i>If your learners have already read the case prior to the session, you may still wish to provide 3-5 minutes so learners can re-scan the case.</i></p>
<b>Part IIb: Case Recap (5 minutes)</b>	
<p><b>If your learners have read the case before the session</b>, it's helpful to engage them in a "case recap" to reactivate the case before the discussion. Ask a volunteer to share key case details, using the character and setting chart at the beginning of the case. Other participants can chime in with ideas they feel have been</p>	<p><b>Notes:</b> <i>While it's nice to have members of the group provide the recap, to save time you could present a short written recap or have the facilitator give a recap. Still allow people to add details that seem important to</i></p>

<p>missed. The goal of the recap is to remind participants about the “facts of the case” before they begin discussing the dilemmas.</p>	<p><i>them.</i></p>
<p><b>Part IIIa. Discussion: What are the dilemmas? (15-20 minutes)</b></p>	
<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"> <li>● 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.”</li> </ul> <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"> <li>● What are the dilemmas in this case? For whom are they dilemmas?</li> </ul> <p>Potential follow-up questions include:</p> <ul style="list-style-type: none"> <li>● Which character faces that dilemma?</li> <li>● We haven’t yet talked about [this character/stakeholder]. What dilemmas do they face?</li> <li>● Dilemmas can be specific and practical, like concrete choices to be made (i.e., decisions a specific character needs to make), or big philosophical questions (e.g., the purpose of schooling), or anything in between. Do you see any dilemmas [at a more abstract or concrete level]?</li> <li>● Are there any people who don’t feature in the case by name but who might be facing dilemmas because of what’s happening here?</li> </ul> <p>See the case-specific supplemental guides for more questions that can help groups unpack the dilemmas particular to each case.</p>	<p><b>Notes:</b> <i>We often ask discussion participants to start by naming the most obvious dilemma, the one that’s likely on most people’s minds. We then 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><b>Modifications:</b> <i>If you are short on time, you can shorten this section to 10 minutes, but we recommend giving the group as close to 15-20 minutes as possible.</i></p> <p><b>Facilitator Tips:</b> <i>Try not to respond to the first 1-3 comments and instead look to the other participants to build on what has been said. If you establish a pattern where participants expect you to respond to every comment, it will be hard to run a learner-centered discussion.</i></p> <p><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.</i></p> <p><i>Be ready 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.</i></p>
<p><b>Part IIIb. Discussion: Why are these dilemmas? (15-20 minutes)</b></p>	
<p>Before asking the next question in the protocol, give a short summary (2-3 minutes) of the dilemmas raised. You might organize this summary around different characters or</p>	<p><b>Notes:</b> <i>You may wish to provide discussion participants with a list of possible values that might be at stake in the case.</i></p>

<p>stakeholders or around different context levels present in the case (i.e., interpersonal, classroom, school, district, community, society, etc.).</p> <p>Then, use the following questions to delve deeper:</p> <ul style="list-style-type: none"> <li>● Why are these dilemmas?</li> <li>● What values or principles are at stake, and for whom?</li> <li>● What practical and/or policy considerations are at stake?</li> </ul> <p>Potential follow-up questions include:</p> <ul style="list-style-type: none"> <li>● Do characters in this case disagree about which values matter, which should take precedence, or how they apply?</li> <li>● Do characters in this case disagree about which considerations are relevant, which should take precedence, or how they should be addressed?</li> <li>● Which factors are influencing relational trust between the different stakeholders?</li> <li>● Who has the most to gain or lose in this dilemma?</li> <li>● Which relationships with different stakeholders and/or external groups should leaders in the case be considering with particular care?</li> </ul> <p>See the case-specific supplemental guides for more questions that can help groups unpack the values tensions in each case.</p>	<p><i>If learners seem to want to jump to discussing solutions, consider sharing a reminder such as: “If you find 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 make sure to take the time to reflect at the end!</i></p> <p><b>Modifications:</b> <i>If you are short on time, you can shorten this section to 10 minutes. But we recommend giving the group as close to 15-20 minutes as possible.</i></p> <p><i>You might consider having participants split into pairs or trios for the first part of this section. If you listen to a few groups while the participants are talking, you can get an idea of which pairs are discussing key values. 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.”)</i></p>
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**Part IIIc. Discussion: What *might* be done in this case? (5-10 minutes)**

<p>Have discussion participants brainstorm <u>possible</u> 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 questions:</p> <ul style="list-style-type: none"> <li>● What choices are available, and to whom?</li> <li>● How do those choices relate to the values that we surfaced?</li> </ul> <p>Potential follow-up questions:</p> <ul style="list-style-type: none"> <li>● How does each of these choices frame and/or address the dilemmas?</li> <li>● For each choice, what is gained? What, if anything, is lost or sacrificed? What tradeoffs might come with this</li> </ul>	<p><b>Notes:</b> <i>You may wish to give participants time to brainstorm or discuss in pairs before opening this question to the group, if time allows.</i></p> <p><i>It can be helpful to record the possible choices in an area visible to the learners (e.g., a digital whiteboard, chart paper) to create a common “text” that can be used in the next section.</i></p> <p><i>You may need to remind your group that the goal at this stage is simply to list</i></p>
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<p>choice?</p> <ul style="list-style-type: none"> <li>• How might power dynamics impact the decision-making capacity of a character?</li> <li>• How would this decision affect the most vulnerable?</li> </ul>	<p><i>possibilities about what might be done, not to look for the best possible answer.</i></p> <p><b>Modifications:</b> <i>If you are pressed for time, omit this section and instead move to the next question of what <u>should</u> be done.</i></p>
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**Part III.d. Discussion: What *should* be done in this case? (5-10 minutes)**

<p>Ask participants to consider what should be done in the case, using the following question:</p> <ul style="list-style-type: none"> <li>• What do you think should be done in this case, and by whom? Why?</li> </ul> <p>Potential follow-up questions:</p> <ul style="list-style-type: none"> <li>• What systems or routines would need to be in place to follow through with a particular action?</li> <li>• How should the decision be communicated?</li> <li>• How would this decision affect the most vulnerable?</li> <li>• Who stands to gain from this decision? Who stands to lose?</li> <li>• What additional information might the leaders in the case want to learn before they make their decision?</li> </ul> <p>See the case-specific supplemental guides for more questions that can help groups think through potential solutions for each case.</p>	<p><b>Notes:</b> <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 from the previous step, it can be helpful to annotate that list with the values each option upholds.</i></p>
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**Part IV: Reflections and Key Takeaways (10-20 minutes)**

<p>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:</p> <ul style="list-style-type: none"> <li>• Which character in the case do you identify the most with? Why?</li> <li>• What ideas presented in the case were new or surprising to you?</li> <li>• How are you thinking about balancing the needs and values of different stakeholders after discussing this case?</li> <li>• 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?</li> <li>• What missing information will you seek out as you confront ethical dilemmas in your own school/district?</li> </ul>	<p><b>Notes:</b> <i>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.</i></p> <p><i>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.</i></p> <p><b>Modifications:</b> <i>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 reflection time for</i></p>
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<ul style="list-style-type: none"> <li>● What did you learn about yourself as a leader and the values you bring to your role?</li> <li>● What did you learn about your institution, organization, or broader context from this case and/or discussion?</li> <li>● What have you learned from talking about this case that might apply to other ethical dilemmas in educational leadership?</li> <li>● What have you learned from this case and/or discussion that you'd like to take back to your own classroom/school/district?</li> <li>● What value(s) are you thinking about in a new way or for the first time?</li> <li>● What lingering questions will you take away from this discussion?</li> </ul> <p>To make people's thinking visible, you might ask for volunteers to share some of their reflections, or you may go around and ask everyone to share. Alternatively, you could collect shared thinking digitally, through a shared document or digital discussion board platform.</p>	<p><i>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.</i></p> <p><b>Virtual Modification:</b> <i>For a virtual discussion, a waterfall technique could work well here. Have each person type their sentence/ question into the chat box, but do not press enter until everyone is ready. Then, have everyone press enter at the same time to view all responses at once.</i></p>
<p><b>Part V: Optional Space for Feedback (2-5 minutes)</b></p>	
<p>If you would like to provide a space to give feedback at the end of each session, ask participants to anonymously provide positives (plus +) and potential changes (deltas Δ).</p> <p>In person, you can use sticky notes, paper, or an online form. Virtually, consider using an online form.</p>	<p><b>Notes:</b> <i>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.</i></p> <p><i>If this discussion is part of an arc of learning, consider how you can use the feedback as you plan the next session.</i></p>

## “First Rate”

### Essential Questions:

- *How can educational leaders identify the values that are important to them, their stakeholders, and their institutions?*
- *What is values-driven leadership?*

### Summary:

Kelly Danvers is not a new principal, but she’s new to Worthington South Elementary. As she completes her teacher evaluations at the end of the year, she’s unsure whether to rate veteran teacher Dan Sanderson “Developing” or “Proficient.” Dan’s strong classroom community and culturally-responsive practices are inspiring, but Kelly has yet to see him deliver an effective literacy lesson, despite three observations.

Should she adhere strictly to the district rubric—thus placing Dan on an Improvement Plan—or deviate from it, potentially risking her own job in the process?

### Additional Resources:

- In this case, characters wrestle with how a teacher’s performance should be measured. The article on [“Humane Teacher Evaluation” \(redirect\)](#) argues that instead of assessing teachers by their students’ performance, systems should evaluate teachers on other metrics to improve school culture.
- Does it matter how teacher evaluation data is collected? The [Harvard Best Foot Forward Project \(redirect\)](#) supports using teacher-collected videos for evaluation: teachers provide videos of their teaching to show mastery instead of solely relying on a supervisor’s observation. The project promotes this approach to enable a more accurate and comprehensive understanding of a teacher’s skills.
- Take a moment to research your country, state, or local teacher evaluation model. Start with the your relevant municipal, regional, and/or national department(s) of education.
- The Shanker Institute explores changes to teacher evaluation in their overview [“Rise and Fall of the Teacher Evaluation Reform Empire \(redirect\),”](#) which highlights the challenges of creating, implementing, and accepting teacher evaluations.
- How can we foster discussions about the merits and challenges of rubrics and choosing what to measure? Explore [“Getting Teacher-Evaluation Rubrics Right” \(redirect\)](#) to learn different questions that educators can unpack together.

### Case-Specific Questions:

#### Dilemma Questions:

- How does Kelly’s status as a principal who is new to the district impact the dilemmas that she faces?

- Dan hints at budget challenges in the district when he mentions that the art teacher’s position was cut. How, if at all, might budget concerns play into the dilemmas Kelly faces?
- Literacy is an important part of the state testing students take, while science and art are not. How does testing play a role in the dilemmas that Kelly faces?
- While the case is recounted from Kelly’s point of view, Dan is also a moral actor here. What dilemmas does he face?
- Dan is a longstanding, respected teacher at Worthington. How does his social position factor into the dilemmas Kelly faces? How, if at all, should his social position impact her decision?
- Kelly fears that being put on an Improvement Plan might cause Dan to leave the district. How, if at all, should concerns about teacher retention impact her work on teacher evaluation?

**Values Questions:**

- Kelly expresses some concern that the rubric doesn’t take into account the full range of Dan’s skills in the classroom. What strengths and/or weaknesses do you see in using rubrics as a tool for teacher evaluation?
- Dan tells Kelly that Improvement Plans are for “bad teachers.” How do you think Dan and Kelly would each describe a “good” teacher? How would you?
- Just before she goes to her meeting with Dan, Kelly receives an email from a group of parents concerned about Dan’s teaching. How, if at all, should parental feedback impact teacher evaluation?

**Solution Questions:**

- The superintendent has let Kelly know that her skill as an evaluator helped her earn the principal job. How might he support her with the dilemmas that she faces when evaluating Dan?
- Throughout the case, Kelly attempts to address her dilemmas by herself. Who else might she reach out to for support? How might she do so in a way that maintains the privacy of the evaluation process?

**Reflection Questions:**

- Kelly discovers that her predecessor consistently rated Dan as Proficient. How, if at all, should these past evaluations impact her thinking about this year’s evaluation? How, if at all, might her thinking differ for newer staff and veteran staff?

## Extension Activities

As you've seen, between the general facilitation guide and case-specific questions, you can easily fill 90-120 minutes with an NCS discussion. However, you may sometimes want to spend more time with a particular case and the dilemmas it raises, whether within the same session or at a follow-up session. Below you'll find some possible extension activities you might use with the cases.

As you think through which extension activities to use (if any), consider the goals and interests of your group members. For example, if the end goal is for participants to deepen their own understanding, the discussion could end with a writing assignment. Or, if the end goal is team building, participants could conclude by sharing what they have learned about their own values or the values embraced by their community.

### Extension Activities (Optional)

- Write a 150-300-word **reflection** on a follow-up question not discussed. (10-20 minutes)
- Write a 150-300-word **reflection** on a case-specific question. (10-20 minutes)
- Assign one or two of the reflection questions from the protocol as a journaling prompt. (10-30 minutes)
- **Perform [a character deep dive](#)**. Examine one of the characters in the case in-depth, unpacking their main values and the specific steps they could take next. (15-20 minutes)
- **Use the [“I Used to Think... Now I Think...”](#)** thinking routine to help participants reflect on their thinking and explore how and why their thinking has changed. (10-20 minutes)
- **Use the [“Connect, Extend, Challenge”](#)** thinking routine to draw connections between new ideas and prior knowledge in the case. Use the following questions to guide the reflection. (20-30 minutes)
  - Connect:
    - How is the case connected to something you know about?
    - How does the case connect to what you know about dilemmas in your institution?
    - Have you been in a similar dilemma?
  - Extend:
    - What new ideas or impressions are extending your thinking in new directions?
    - What new ideas did you learn through using this protocol for examining dilemmas?
  - Challenge:
    - What was challenging or confusing in the case and/or discussion? What are you wondering about?
    - What would you like to learn about your own institution after reading and discussing this case?
- **Whole Group Reflection option:** Create a “found poem”: ask participants to choose first a sentence, then a phrase, then a word from the case. Ask the group to stand in a circle and go around,

having everyone share first their sentence one after another, then their phrase in a second round, then finally their word in a third round, without commentary or interruption. It sounds simple but can be surprisingly profound. After the found poem has been “performed,” you can ask the group to reflect on the experience. What was it like to choose small pieces of the text; what factors influenced their decisions? How did choosing their text and/or hearing the found poem change or deepen their thinking about the dilemmas in the case? (15-20 minutes)

- **Create a visual representation** or other artistic interpretations of the key tensions and choices at stake in the case. Use any materials (drawing utensils, pipe cleaners, construction paper, tape, and other simple craft materials) or other mediums (podcasts, videos, even interpretive dance). (30-60 minutes)
- **Creative writing:** Ask participants to write a 1-page dialogue between themselves and a character in the dilemma. What would you say to the character about the dilemma, and what might they say in response? How would you express your own values to the character? (30-45 minutes)
- **Related Cases:** If you want to explore a similar dilemma, consider these other cases developed by the EdEthics team:
  - **Going Public:** Seeking to offer enrollment to students from a local urban center, a suburban superintendent must determine how best to use his position to create an inclusive district.
  - **Course Correction:** A middle school principal must decide whether to run a critical consciousness course despite pushback from the community and a new law forbidding the teaching of “divisive concepts.”
  - **School Walkouts as Civil Disobedience:** District leaders in Portland, OR, face dilemmas when students organize walkouts to protest the election of Donald Trump.
  - **Taking the Action Out of Civics?:** Facing community and staff disagreement over project-based civics education, a high school department chair must decide whether to push to keep the project in the curriculum.
  - **Refusing the Test:** A school principal determines how to respond to community division as growing numbers of parents opt their children out of state standardized testing.
  - **A Qualified Disaster:** In this nonfiction case, officials in the United Kingdom grapple with dilemmas about standardized assessment and grade inflation when national exams are cancelled during the COVID-19 pandemic.
  - **No Laughing Matter:** School leaders and the CEO of a racially-diverse multi-academy trust in England debate how to handle recurring anti-Islamic graffiti in one of their schools.
  - **Faith in Mr. D:** A middle school principal in Canada faces a firestorm when he allows students in his majority-Muslim school to conduct Friday prayers in the school cafeteria.

# Using Additional Resources

The case-specific supplemental guides and case webpages include additional resources that can offer insights into the dilemmas raised by that case. These resources are a mix of news reporting and academic research that offer additional context, as well as commentaries and opinions that offer individual views on the issues in the case. Think about what additional resources might be most helpful for your group. If you choose to assign additional resources, here are some potential activities to use with them.

## Extension Activities for Participants Using Additional Resources

- Participants can **practice perspective taking** by reading **additional resources** that take a stance on the issues raised in the case. Here are some questions they might consider:
  - What values does each author seem to hold? How do you know these are their values?
  - What do you agree with in this article? What do you disagree with?
- **Pick a Line:** Assign any additional resource and ask participants to pick a line that deepens their understanding of the case. In small groups, have each participant share their line. After each share, the others in the group discuss why the participant might have chosen the line: how does it deepen our understanding of the case? The participant then shares why they chose the line. The process repeats for each participant.
- **Think-Pair-Share:** Assign half of the participants one perspective resource and the other half a different perspective. Pair individuals who read different perspectives, and ask them to share a quick summary of the text and their thoughts.
- **Jigsaw activity:** Participants are divided into small groups, and each group is assigned a specific resource. They become “experts” on the resource, and then participants are redistributed into new groups, with one expert from each of the original groups present in the new group. Within the new group, each participant takes turns teaching the other members about their assigned resource.
- **Gallery Walk:** Place excerpts (from a sentence to a paragraph in length) from the additional resources around the room with space to write comments and reflections. Allow participants time to walk around the room, read pieces that interest them, and leave comments and questions with markers. Participants can also respond to others’ comments. After the time, assign one person to each poster to summarize the comments.

## Expert Video Commentaries

Each case webpage contains short videos in which current and former educational leaders, as well as researchers in educational leadership, share their expertise on the issues raised by the case. Consider assigning one or both videos for each case to support your participants’ learning.

In addition to the videos on the case webpages, EdEthics has created a library of expert videos on educational leadership in a video playlist: [Values-Driven Leadership](#). You may find videos in this playlist that are more relevant to your group's needs than the videos provided on each case webpage.

Below are some reflection questions you can use to help your group reflect on their learning after watching each video. You might also consider using some of the extension activities above with the videos.

#### **Video Reflection Questions (Optional)**

- What stood out to you in the video, and why?
- What was familiar to you? What was new?
- What do you agree with in this video? What do you disagree with?
- What values do you think the expert is conveying through their comments?
- How do the perspectives raised in the video connect to the perspectives raised in the case study?
- How did the video commentary impact your understanding of the dilemma?
- What questions do you have after watching this video?

## Closing The Pathway

By the time you've reached the end of the pathway with your group, you'll have explored a variety of difficult ethical dilemmas over a series of potentially challenging conversations. It's important to bring some closure to your pathway in a way that makes sense for your group. Whether you close out the pathway at the end of your last case discussion or have a final session specifically to reflect together, take some time now to think about your goals, and consider how you might best end this arc of learning for your group. Your plan may change as the pathway progresses—it seems almost certain it will—but here are a few ideas to jumpstart your thinking.

### Closing Activities (Optional)

- **(RECOMMENDED)** End with gratitude for the individuals in the group and the group as a whole.
- Reflect on what participants learned together. Use one of the reflection thinking routines in the extension activities or the reflection portion of the general facilitation guide.
- Discuss what participants want to learn after the pathway.
  - What questions do they still want to answer? Take time to reflect individually, then share with another person or the whole group if they feel comfortable to do so.
  - If this group will continue to work together, it may be helpful to choose some questions that will guide future work.
- Consider tangible next steps and actions. We hope that through this pathway, participants feel encouraged to continue their learning and/or take a tangible action step to address the legacy of slavery. Encourage participants to create a SMART action plan. (Specific, Measurable, Achievable, Relevant, and Time-bound). This will make it more likely that participants will act.

## Gratitude

In the spirit of closing with gratitude: Thank you for using this learning pathway. To explore more dilemmas in education, visit the EdEthics website at [justiceinschools.org](http://justiceinschools.org), where you'll find not only [our case bank](#) but also ethical case simulations, short “brief-cases,” other learning pathways, and more.

**Lastly, your input helps us improve. Please consider filling out this [survey](#) to leave feedback on this learning pathway. Thank you again for your participation.**

# Appendix I: Participant Worksheet

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 worksheet 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 then “warm call,” or call on participants you heard making good 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: “[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 them that they will get to talk about taking action. However, 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. For example: “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 the facilitation 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: "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. Or 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.

## Appendix III: Discussion Structures<sup>1</sup>

Would you like more options for different group sizes and discussion goals? Consider the discussion structures in the table below.

Option	Description
<b>Whole Group</b>	<ul style="list-style-type: none"><li>● Typically, one facilitator guides the conversation of the whole group.</li><li>● This is an appropriate format for groups that have fewer than fifteen participants.</li><li>● For larger groups, you can involve more participants by having several partner talks during the whole-group discussion.</li></ul>
<b>Small Group</b>	<ul style="list-style-type: none"><li>● This is a way to break up larger groups into discussion-sized sections.</li><li>● Form smaller groups of four to eight, each with its own facilitator.</li><li>● Ideas between small groups are shared. Ways to do this include:<ul style="list-style-type: none"><li>○ Reconvene to the larger group and have a group presenter share a key idea from the group— perhaps the group’s response to the question at the end of the case.</li><li>○ Reconfigure, or “jigsaw”, the groups so that each new group includes at least one member from the original groups.</li><li>○ End with a final whole-group discussion.</li></ul></li></ul>
<b>Fishbowl</b>	<ul style="list-style-type: none"><li>● This is ideal for medium to large groups.</li><li>● This option encourages careful, active listening.</li><li>● Some participants begin as speakers while others are assigned the role of listeners. Often a group of chairs is placed in the center of the room for the speakers, and the listeners sit outside this circle.</li><li>● Sometimes listeners may be asked to comment on the discussion: who is participating, what kinds of arguments are being presented, or where</li></ul>

<sup>1</sup> This table was originally published in Levinson, M., & Fay, J. (Eds.). (2016). *Dilemmas of educational ethics: Cases and commentaries*. Harvard Education Press, pp. 214-216.

	<p>points of agreement versus disagreement are arising.</p> <ul style="list-style-type: none"> <li>● Fishbowl participants may speak for themselves or as representatives of a particular author or perspective.</li> </ul>
<b>Town Hall</b>	<ul style="list-style-type: none"> <li>● This is ideal for larger groups.</li> <li>● This offers a great way to get ideas from multiple perspectives onto the table, including roles or perspectives that members of the group might not represent on their own.</li> <li>● Participants speak from a particular role or perspective. Facilitators begin by having participants introduce themselves, identify their roles, and then speak briefly (1-2 minutes) on the case.</li> <li>● Facilitators can assign participants to speak from the perspective of someone in the case (e.g., a student, a professor, a community member, an administrator) to represent the viewpoints of one of the characters, or speak from their real-life role.</li> <li>● If there is enough time, the facilitator can assign participants different roles during different rounds of discussion.</li> <li>● Often, facilitators allow participants to break out of their assigned perspective in the final round of discussion.</li> </ul>
<b>Digital/Online</b>	<ul style="list-style-type: none"> <li>● This option can work for groups of any size.</li> <li>● Different programs and apps will determine the structure of the discussion.</li> <li>● Popular formats include threaded online discussions, video conferencing, digital collaborative spaces such as wikis and shared docs, and social media.</li> <li>● This can be a good way to document and preserve case discussions.</li> </ul>