



PARTNERSHIP  
FOR THE  
**FUTURE** *of*  
**LEARNING**

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# CONVENING BREAKTHROUGH CONVERSATIONS: CHARTER SCHOOLS

A Toolkit for Partners  
September 2024

## About the Partnership

The Partnership for the Future of Learning protects, strengthens, and advances education equity and meaningful learning—and supports the policies and practices that get us there. Launched in 2015, the Partnership has grown into a robust and generative social impact network of education and social justice leaders who share a deep commitment to an equitable, high-quality public education system. The network includes organizers, advocates, policy analysts, communicators, researchers, students, caregivers and parents, educators, funders, and system and union leaders.

## Acknowledgements

The *Convening Breakthrough Conversations: Charter Schools – A Toolkit for Partners* was led by the Partnership’s Policy Director, Jasmine Bolton, in close collaboration with Co-Director Evelyn Aissa and Strategy Advisor Kavitha Mediratta, and with support and contributions from Communications Consultant Jenni Kotting. The Toolkit is based on the Breakthrough Charter Conversation Series convened by the Partnership with expert facilitation and guidance from Shadiin Garcia, Scott Nine, and Roberta Furger.

A great many network partners participated in the Breakthrough Charter Conversation Series, beginning with the Wading Into The Waters session at the 2023 National Assembly and continuing in virtual and in-person convenings between June and August 2024. Deep gratitude to the two dozen partners who spent hours discussing questions of equity and access in charter schools, distilling important themes and tension points, crafting a set of value statements and thinking through possible applications at the local, state, tribal and national levels. Thank you also to the Partnership’s Steering Committee for their ongoing engagement and support for this important work.

# Table of Contents

<b>Introduction</b> .....	<b>4</b>
<b>Organization of the Toolkit</b> .....	<b>5</b>
<b>Roadmap of the Process</b> .....	<b>6</b>
<b>Phase 1: Building a Conversation Strategy</b> .....	<b>6</b>
A. Goals.....	6
B. Design.....	6
C. Participants.....	8
D. Budget Considerations.....	9
<b>Phase 2: Launching &amp; Iterating</b> .....	<b>9</b>
Session 1 - Wading Into the Waters.....	10
Session 2 - Naming & Owning the Views.....	12
Session 3 - How Can Equity Be Ensured?.....	14
Session 4 - Finalizing the Framework.....	16
Debrief & Iterate!.....	17
<b>Phase 3: Sharing &amp; Using the Results</b> .....	<b>18</b>
<b>Conclusion</b> .....	<b>18</b>

## Introduction

Over the past three years, public schools in the United States have faced increasing pressures from ‘parent rights’ campaigns, book bans, policies discriminating against transgender youth and adults, and exclusionary rhetoric and policy on race. These pressures are building in a broader context of expanding school voucher programs that undermine public education by privatizing public resources.

In May 2023, the Partnership for the Future of Learning initiated a network and field-wide study to gather information on how organizations are responding to these challenges and what might be done to enhance their ability to effectively respond. Our intent was to inform a new network strategy in support of public education while advancing an affirmative vision of the future of learning. Interviewees identified eight areas of support that would help counter the attacks on public education and build a stronger coalition for a future-facing vision of public schools. Our report, [Powering a Breakthrough for Public Education: A Report on Field Needs and Opportunities for Partnership Action](#), details each of these eight areas.

**This Toolkit grows out of our work on the sixth area of support: addressing long-standing divisions in the public education community that undermine more powerful collective action to strengthen public education.** We took the first leap in addressing these divisions by launching a *Breakthrough Conversation* on public charter schools at our Network Assembly in November 2023 and engaged 150+ partners with diverse expertise and lived experiences related to charter schools in a two-hour facilitated conversation on the issue.

Building on the initial conversation, we convened three follow-up conversations on charter schools with a subset of two dozen partners during the summer of 2024. Our goals were to surface and explore the various perspectives related to charter schools; strengthen deep listening skills, relationships, and cohesion within our network; and ultimately create and workshop a network values framework to guide the Partnership's work going forward. The conversation methodology relied heavily on dialogue with a deep commitment to learning from and being guided by the wisdom of participants.

Our journey through the charter conversations was transformational. As Partnership staff, we initially sought to uncover the conditions in which charter schools might be part of an educational equity strategy, and therefore, to inform a framework that we could use in recruiting partners and refreshing our policy agenda. **But we soon learned that our focus was too narrow. The overarching issue was not about charter schools. Rather, it was about clarifying what it means to be a public school and school system.** Grappling with this question of *publicness*—specifically, what it looks like to be connected, responsive, and accountable to students and their families and communities—led to the development of a broad set of aspirational values by conversation participants. This document, [A Framework for Strengthening Public Education](#), can be used to push and support *all* schools to improve, including charter and typical public schools.

This Toolkit draws on our journey in the Breakthrough Conversations on charter schools. It offers examples and insights from our experience. We hope it will be useful for network partners and other advocates seeking to hold similar conversations in your communities, whether on charter schools or other topics.

As you adapt this Toolkit to meet the needs and strengths of your organization and community, please share back with us using [this form](#). This is a living resource that we will continue to update to reflect how you make use of it. We plan to convene conversations on other challenging issues within the public education community and we welcome your thoughts on topics that would especially benefit from a dialogue process.

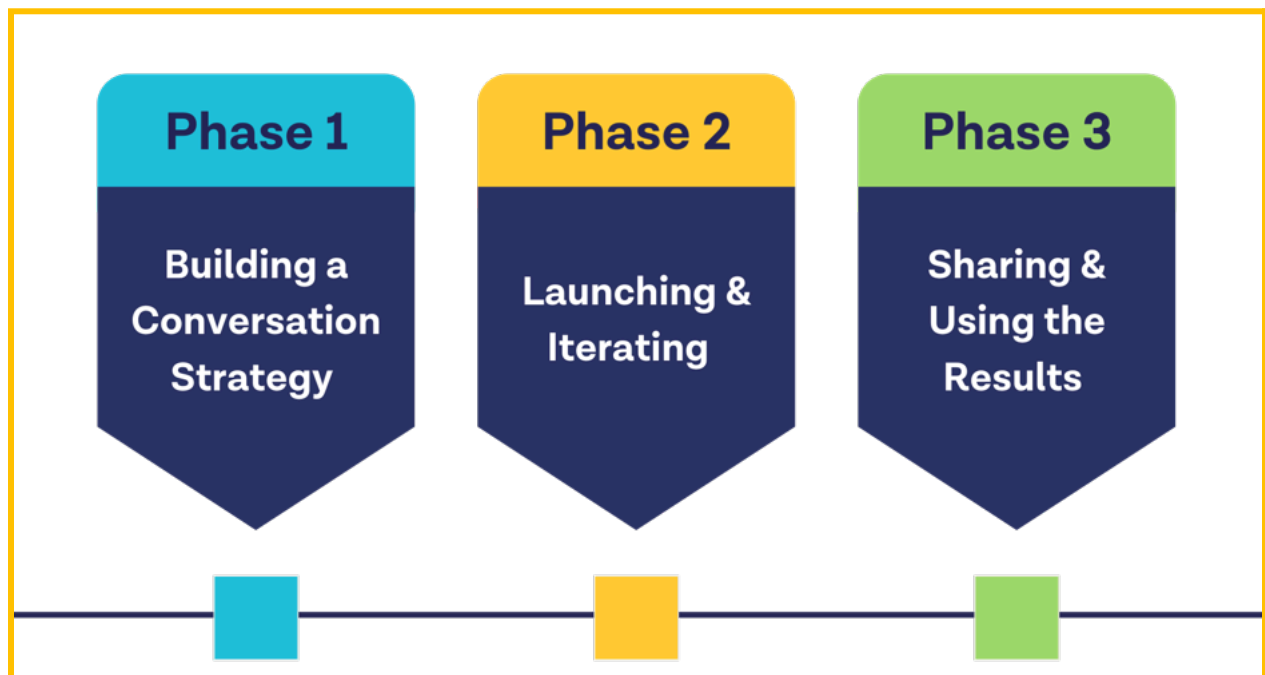
## Organization of the Toolkit

This Toolkit is organized by the three phases we followed in developing the conversation series:

- Phase 1: Building a Conversation Strategy
- Phase 2: Launching & Iterating
- Phase 3: Sharing & Using the Results

Below is a summary of the process steps, objectives, design, and facilitation choices in each phase. It is offered as food for thought as you consider what will best meet the needs, interests, and strengths of your community. We also provide links to downloadable sample materials that you can customize to launch a similar series in your community.

## Roadmap of the Process



- Set objectives & timeline
- Determine who will be engaged in the conversations
- Figure out facilitation and format needed (virtual / in-person / hybrid)
- Build budget / fundraise

- Facilitate Conversations 1 - 4
- Debrief, gather input, plan and adjust facilitator agendas
- Develop and refine your emerging values framework with participants

- Share final product/s
- Strengthen existing relationships & build new ones

## Phase 1: Building a Conversation Strategy

The first step is to assemble a planning team to map out the overall strategy for the series. Areas our planning team considered included:

- A. *Goals*
- B. *Design*
- C. *Participants*
- D. *Resources*

### A. *Goals*

Our goals for the Breakthrough Conversations on Charters Schools were developed in consultation with partners in the network. We wanted to understand the diversity of viewpoints, what people were excited or worried about, and what kind of conversation experience would help to move the field forward. Consultation with partners informed the process at every stage of development, from design to implementation.

#### THE PARTNERSHIP'S BREAKTHROUGH STRATEGY ON CHARTERS

**Goal 1:** Convene the Breakthrough Conversations on charters, strengthening deep listening skills, partner relationships, and network cohesion.

**Goal 2:** Create and workshop a network values framework via Breakthrough Conversations that guides relationship-building and partner recruitment.

**Goal 3:** Adapt the network's Breakthrough Conversation strategy and process into a shareable toolkit to support partners as they engage in similar conversations in their own networks.

### B. *Design*

Our conversation series was structured as four dialogue sessions alongside a parallel process of building a values framework based on the group's inputs. In developing this design, our team grappled with questions such as:

- How many dialogue sessions will we need to achieve our goals?
- Will sessions be held in-person or virtually, or a combination of both? What is the optimal timing for holding them?

- Do we have in-house facilitation expertise? Will external facilitators be required?
- What steps are needed to ensure a shared framework will emerge from the conversations?
- What staffing support will be needed to synthesize participant inputs and prepare materials from one session to the next?
- How will we build ongoing participant inputs into the design process?

**Facilitation.** We found that when Breakthrough Conversation facilitation modeled open, honest and caring engagement, participants were more comfortable sharing what they were thinking because they trusted they would be listened to with respect by others. This kind of facilitation can benefit from facilitators who are skilled in dialogue processes with diverse groups, have direct experience with the topic, and are knowledgeable about what the issues and tension points may be. This likely requires a team, rather than a single facilitator.

PROJECT PLAN TEMPLATE

**Arc of the Conversation Series.** We designed dialogue sessions to help participants practice listening to different viewpoints, gather and explore the range of perspectives on charter schools, identify overarching values, and build a shared values framework. Our team met between sessions to synthesize notes from the conversations into draft material to bring back to participants for review and iteration at the next session.



## LESSON LEARNED: TIME FOR PLANNING

If the process goes well and deep listening and collaboration are happening, there may be a lot of substantive feedback and ideas to digest. We found we needed more time for the facilitation team to debrief and synthesize material between sessions. Specifically, we had anticipated needing 16 dedicated hours for synthesis and ended up needing 40 hours.

### *C. Participants*

We aimed to keep the group small to foster trust and relationship-building among participants. We thought a range of twenty to twenty-five people would offer a variety of perspectives while also supporting participants to get to know each other and enable each participant to contribute meaningfully.

Our selection criteria included:

- Shared commitment to the Partnership network's values of equity, respect for a diversity of perspectives, and belief in the importance of public education.
- Diversity of background and lived experience related to the conversation topic. For example, we sought to include a wide range of people from grassroots organizers opposed to charter schools to funders of charter networks.
- Time and interest to participate consistently in this process. We convened the majority of our dialogues during the summer months. This timing had the benefit of enabling students to participate while school was out of session, but it may have been challenging for others navigating childcare and vacation commitments.

***Encouraging Consistent Participation.*** Sustained attendance can be challenging in conversations that span multiple sessions. We included session dates in our conversation series invitation email to encourage consistent participation, and asked participants to commit to attend all sessions as part of their registration.

### SAMPLE EMAIL: SESSION INVITATION

## LESSON LEARNED: TRADE-OFFS IN GROUP SIZE AND DIVERSITY

Because this type of conversation is intentionally designed to be small and intimate, there is necessarily a limited number of perspectives in the group. It can be challenging to balance size versus diversity of viewpoints to meet the needs of your constituency.

### *D. Budget Considerations*

What funding and other types of support will be needed? Considerations to support financial planning include team time, additional facilitation capacity, and in-person convening costs such as space rental, catering, participant stipends, travel, supplies, and printing.

**Transparency.** Clarifying the decision-making process at the start helped our planning team to identify and weigh the budgetary implications of group size and composition, design and facilitation choices.

## ADAPTABLE FUNDRAISING PROPOSAL

### KEY CONSIDERATION: IN-PERSON OR VIRTUAL?

Meeting in person offers informal opportunities for participants to deepen relationships and understanding of each other. Virtual sessions also can be designed for collaboration and relationship-building through opportunities to meet in pairs, triads, and small and large groups. Virtual options also tend to have less of a barrier to participation, and can make it easier for people to participate than a completely in-person experience. We opted for a combination of virtual and in-person approaches to foster connection and lower costs.

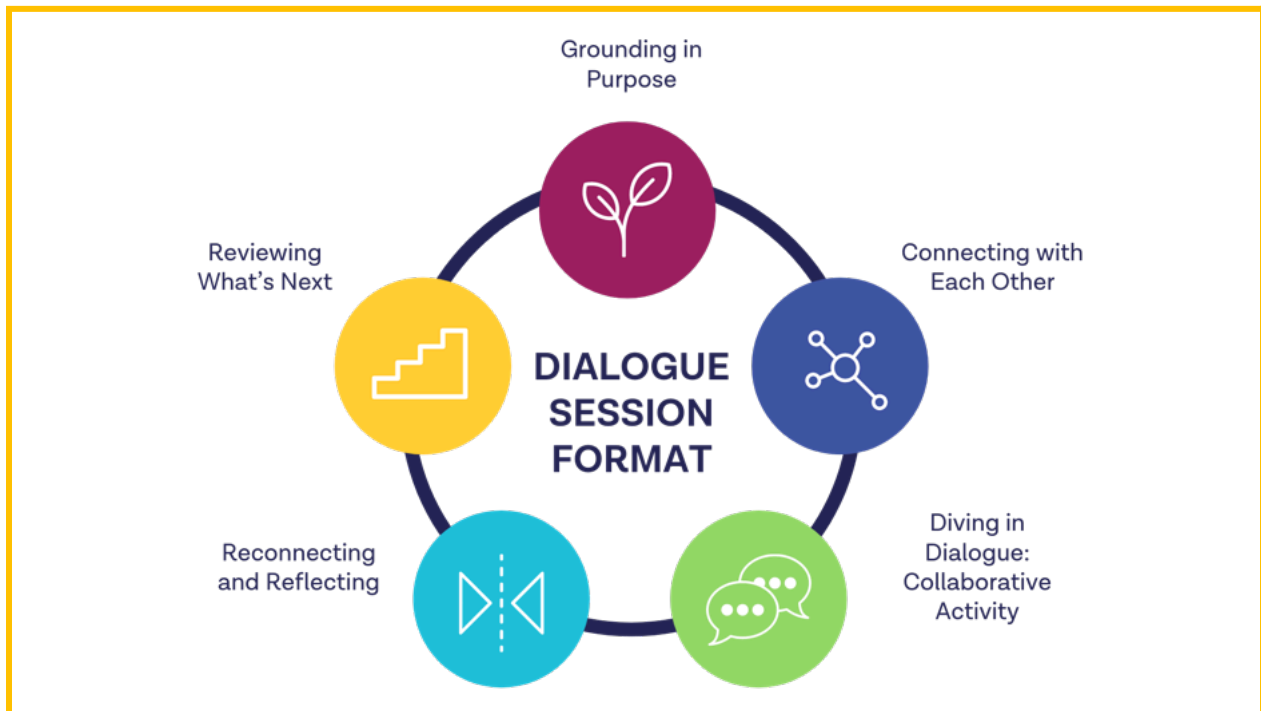
## Phase 2: Launching & Iterating

The following dialogue session plans are resources that you can duplicate and modify to meet the needs of your organization and context.

Below you will find session overviews with tips for consideration, facilitation options, and lessons that we learned in developing the Breakthrough Conversation series. Links are provided to detailed

facilitator agendas and other sample documents to start your planning and implementation, such as presentation decks and participant handouts.

**Dialogue Session Format.** *There are many ways to structure group dialogues. We found it helpful to develop a consistent format that we could adapt to the specific objectives, content, and timing needs of each session.*



### LESSON LEARNED: GROUNDING IN PURPOSE

We found it valuable to review Purpose in every session—creating space to field questions and “aha’s” emerging in the group and to speak directly to any issues or tensions raised in the feedback survey or individual calls. In order to be clear with participants, however, we learned we first had to get super clear about our goals for the conversation series: why we chose the topic of charter schools, our intentions in creating a values framework and how this end-product would be used, and what we hoped would come after the conversation series concluded. Clarifying purpose amongst our planning team took several rounds of discussion and thinking to crystallize.

## Session 1 - Wading Into the Waters

The first session focuses on anchoring participants in a strong understanding of why they are there and laying the foundation for authentic sharing and deep listening throughout the conversation series.

While we held the session in-person, it can be held virtually with mixed breakouts for participants to chat and build relationships in pairs, triads or small group activities. Consider assigned seating to create mixed groups for dialogue.

SESSION 1 WADING INTO THE WATERS	
<i>Description</i>	Designed to introduce the idea of Breakthrough Conversations and strengthen understanding, trust, and relationships on a topic that has sparked division within the field for decades. Practicing deep listening with each other.
<i>Objectives</i>	<ol style="list-style-type: none"> <li>1. Deepen viewpoints and perspectives and hold space to listen to each other. This conversation is a beginning point, not consensus or decision oriented.</li> <li>2. Inform future conversations about how the Partnership network will engage on charters-related issues.</li> <li>3. Practice in order to strengthen collective muscles in deep listening and navigating hard conversations.</li> </ol>
<i>Agenda</i>	<ol style="list-style-type: none"> <li>1. Welcome &amp; Context Setting: Why are we here?</li> <li>2. Reflection &amp; Sharing (pairs): Why are you here?</li> <li>3. Goals &amp; Community Agreements</li> <li>4. Perspectives on Charter Schools             <ul style="list-style-type: none"> <li>o Fishbowl: Eight Perspectives on Charter Schools</li> <li>o Small Group Discussion: What is coming up for you? What feels hard?</li> <li>o Large Group Reflection: What was difficult? What was surprising? What made you think?</li> </ul> </li> <li>5. A Warm Embrace: Regrounding in our shared belief in the value of public schools</li> <li>6. Closing: What Comes Next</li> </ol>
<i>Duration</i>	2.25 hours

**What Is Deep Listening?** Deep listening is a practice that helps participants to strengthen their skills in being attentive, receptive, and caring as they engage with the perspectives of others. It means listening with openness, empathy, and trust that what is shared comes from a place of sincerity and genuine experience, even if participants disagree. Deep listening can bring new insight into the intentions and needs of others, creating space for authentic connection and generative thinking to develop.

## DEEP LISTENING AND THE FOUR LEVELS OF LISTENING

- **Listening from Habits** – The most basic form of listening. Does not require any openness; it is about confirming our own pre-existing ideas.
- **Listening from the Outside** – Listening to facts. Requires an open mind, where we notice similarities and differences.
- **Listening from Within** – Listen to emotions, with empathy. Requires an open heart to see the world through another person’s eyes: what is important to them? Why do they believe what they believe?
- **Listening from the Source** – Generative listening requires listening for and to the future that is emerging in the new connections forged.

*Courtesy of the Atlantic Fellows for Racial Equity.*



- [Adaptable facilitators agenda](#) - wading into the waters/warm embrace.
- [Downloadable prompts](#) and [session handouts](#)
- [Adaptable community agreements](#) (key: deep listening-four levels)
- [Link to slides](#)
- [Adaptable shared agenda](#) for participants
- [Link to workspace with debrief questions](#) for 1:1s with session 1 participants

## Session 2 - Naming & Owning Our Views

The second session explores the diversity of perspectives and differences among participants concerning charter schools. It is focused on capturing and honoring every perspective without judgment so that participants have a full, 360-degree view of the landscape from which to work in crafting values in future sessions.

SESSION 2	NAMING & OWNING OUR VIEWS
<i>Description</i>	Designed to gather perspectives and explore the tensions surrounding the charter questions. Inviting participants to express their positions, which are typically deeply held, nuanced, and personal.
<i>Objectives</i>	<ol style="list-style-type: none"> <li>1. Ensure all the various perspectives in the room are surfaced, honored, and acknowledged</li> <li>2. Build norms and skills of deep listening (including introduction of deep listening framework)</li> </ol>

	<ol style="list-style-type: none"> <li>3. Foster relationship-building towards trust amidst discomfort and disagreement</li> <li>4. Ensure every person can articulate the purpose and the trajectory/plan</li> <li>5. Continue to strengthen our relationships with each other</li> </ol>
<i>Agenda</i>	<ol style="list-style-type: none"> <li>1. Welcome, Purpose &amp; Overview</li> <li>2. Building Connections</li> <li>3. Gathering Every Perspective</li> <li>4. Building the Values Framework</li> <li>5. Reflection &amp; Commitment</li> <li>6. Closing</li> </ol>
<i>Duration</i>	2 hours

### LESSON LEARNED: ITERATING ON THE DESIGN

Post-session surveys and calls with participants helped us to adjust and adapt plans as we moved through the process. For example, we learned after Session 1 that participants were ready to dive right into dialogue and needed less priming for sharing and listening than anticipated. Feedback from participants will shed light on the dynamics and leanings of your group.



- [Session 2 Facilitators agenda](#)
- [Adaptable shared agenda](#)
- [Emerging Framework Template](#)
- [Link to slides](#)



## *Session 3 - How Can Equity Be Ensured?*

The third session focuses on developing value statements and exploring how these values might be applied in various contexts. It builds on conversations held in previous sessions. In our process, our team of staff and facilitation consultants developed a draft set of values and shared them with participants ahead of the session. Participants met in small and large groups during the session to discuss and revise the material. We structured the conversation as a full-day in-person convening, with meals and capacious breaks for participants to connect, share, and recharge.

### **FACILITATION OPTION: PROVOCATION ROUNDS**

We used an exercise called Provocation Rounds to support participants to collaboratively develop a set of value statements. Participants worked in small groups and then shared their work with the full group. Feedback was offered as affirmations and questions (“provocations”) about where there might be disconnects, assumptions, or new thinking to explore. The rounds concluded with each group reflecting on what they heard.

SESSION 3 HOW CAN EQUITY BE ENSURED?	
<i>Description</i>	Designed to support participants in exploring shared values. Engaging participants in discussing their values and potential applications in their contexts.
<i>Objectives</i>	<ol style="list-style-type: none"> <li>1. Identify all elements necessary for a strong values framework on charters</li> <li>2. Continue to strengthen relationships with each other</li> <li>3. Identify tensions, guardrails, and questions that must be resolved to move to a place of alignment</li> <li>4. Create the conditions for the final session to pressure test the synthesized emerging framework</li> </ol>
<i>Duration</i>	Full day (9:00 - 4:00); In-person, beginning with a welcome mixer the evening prior
<i>Agenda</i>	<ol style="list-style-type: none"> <li>1. Welcome, Purpose &amp; Overview</li> <li>2. Provocation Rounds               <ul style="list-style-type: none"> <li>○ Prep for Provocation Rounds</li> <li>○ Provocation Round 1</li> </ul> </li> <li>3. Break               <ul style="list-style-type: none"> <li>○ Provocation Rounds 2 &amp; 3</li> <li>○ Return to Small Groups</li> </ul> </li> <li>4. Reflection &amp; Whole Group Synthesis</li> <li>5. Strengthening Our Connections</li> <li>6. Next Steps &amp; Gratitude</li> </ol>

***Making space for different styles of engagement.*** One-to-one calls are a valuable opportunity to learn about participant experiences, address emerging questions, and hear their thoughts on what would be helpful for them. While some participants will be comfortable expressing thoughts and needs in a group setting, others may prefer to do so one-to-one after having some time to process. It also may be helpful to reach out to participants for individual conversations if it appears they are confused or uncomfortable with what is coming up in the dialogue.

### LESSON LEARNED: LEARNING FROM PARTICIPANT WISDOM

Our conversations with participants pushed us to be bolder and more expansive in our thinking. Disconnects with the process or purpose that participants may be experiencing can be clues to guide you in new directions.



- [Session 3 Facilitators agenda](#)
- [Adaptable shared agenda](#)
- [Link to slides](#)

## Session 4 - Finalizing the Framework

The fourth and final session focuses on finalizing the framework that has emerged from the group's work during the conversation series. Does the framework authentically reflect participant conversations and shared values? What further elements might strengthen it? How will participants use it in their work?

We provided participants with an updated values framework in advance of the session with prompts for reflection in preparation for the last session dialogue. We held session 4 in two smaller meetings, and integrated feedback from the first meeting into the draft shared with participants at the second meeting. This allowed us to iterate on the framework in real-time to advance the final product.

SESSION 4 FINALIZING THE FRAMEWORK	
<i>Description</i>	Designed to test and refine the synthesis of values articulated in Session 3. Soliciting feedback on the emerging values framework and exploring how it will be used by participants in their work.
<i>Objectives</i>	<ol style="list-style-type: none"> <li>1. Further clarify the purpose of this multi-session effort</li> <li>2. Test and refine a synthesized emerging framework, including identifying any missing or needed elements</li> <li>3. Discuss what it looks like to utilize the framework over the next year</li> <li>4. Continue to strengthen our relationships with each other</li> </ol>
<i>Agenda</i>	<ol style="list-style-type: none"> <li>1. Welcome, Purpose &amp; Overview</li> <li>2. Workshopping the Framework</li> <li>3. So Now What?</li> <li>4. Needs, Requests &amp; Offers</li> <li>5. Moving Forward</li> </ol>
<i>Duration</i>	2 hours

## FACILITATION OPTION: “NEEDS, OFFERS & REQUESTS”

We drew on the work of longtime Partnership leader Vivian Chang to invite participants to share a *need*, *offer* or *request* of themselves, each other, or the facilitation team that would support usability of the emerging framework.

For example:

- One need I have is ... *to have this reflect disability justice and access before I can try it out with trusted partners.*
- One offer I have is ... *to use the protocol and framework with staff and leaders to discuss external and internal work on charter schools.*
- One request I have is ... *a version of that as a guide could be a good tool to share for folks working with all of this.*



- [Session 4 Facilitators agenda](#)
- [Adaptable shared agenda](#)
- [Link to slides](#)

## Debrief & Iterate!

Gathering feedback between sessions is central to the process. We used post-session surveys to gather quick responses from participants. We also reached out to some participants individually to hear reflections on their experience. Our planning team met concurrently to consider feedback, plan and adjust session designs, and iterate on the emerging framework.

## PROMPTS FOR ONGOING REFLECTION, LEARNING & ADAPTATION

- What went well? What might be shifted for next time?
- What new opportunities or directions are emerging?
- What are we noticing about participant engagement? Who might appreciate a personal call to debrief and reflect?
- What do we need to do to prepare for the next session?
- What will participants need to use the emerging framework?

## Phase 3: Sharing & Using the Results

Phase 3 focuses on sharing the experience with your broader network or community to strengthen existing relationships and forge new connections. Sharing the emerging framework also offers an opportunity to cross walk new insights and understandings developed through the conversation process with the values and principles of others in your network and community.

Questions to consider in dissemination include:

- With whom will you share the framework?
- How might you engage them in sharing their values and perspectives?

### KEY CONSIDERATION: ACKNOWLEDGING PARTICIPANTS

Prior to sharing the conversation experience and emerging framework, consider asking participants how they want to be informed and acknowledged. Depending on the sensitivity of the Breakthrough Conversation topic, participants may have varying degrees of comfort with and leeway to be publicly identified.

## Conclusion

Our purpose in creating this guide is to support efforts to build a strong and enduring coalition for public education by deepening our collective ability to hold and navigate difficult conversations on divisive issues. This Toolkit is offered for you to use and adapt to meet your needs and strengths. As you do so, please [use this form](#) to share your experiences with us. We are eager to hear and learn from you!