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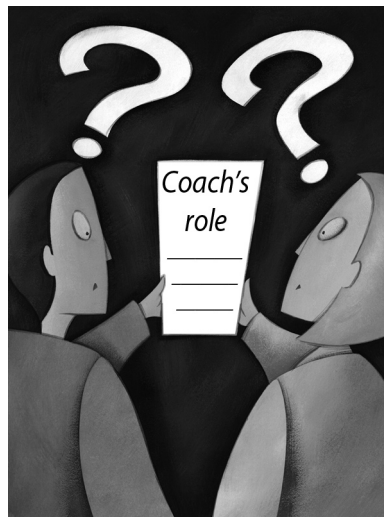
CLARIFY *the* COACH'S ROLE

Solid partnership with principal is key to effectiveness

BY VALERIE VON FRANK

Three C's contribute to an optimal relationship between principals and instructional coaches, according to one principal and coach pair. Pete Hall, currently principal of Sheridan Elementary School in Spokane, Wash., and his former coach, Alisa Simeral, say the essential elements of a successful relationship include clarity, communication, and collaboration.

Hall was principal at Anderson Elementary School in Reno, Nev., when he hired Simeral as an instructional coach nearly a decade ago. Hall had worked with others in positions with titles such as literacy specialist or teacher leaders, but he saw Simeral's role as different from those who had provided instructional expertise with students.

"The push has changed over the last 10 years to staff development," Hall said. "Coaches are here to build the capacity of the teachers they work with. That's been a clear and dramatic shift."

To be effective in providing professional learning that improves student achievement, coaches and principals need to develop a mutual understanding of their roles, Hall and Simeral said, along with a solid partnership. Using knowledge from research and experience, the two published authors recounted what they learned together. Their primer for the leader-coach relationship includes three Cs.

CLARITY

Simeral said she and Hall initially did not discuss expectations for her position.

Coach's role
_____
_____

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NSDC's purpose: Every educator engages in effective professional learning every day so every student achieves.

LESLIE WHITWORTH

Principal, Decker Elementary School

Manor Independent School District

Austin, Texas

Grades: Pre-K-5

Enrollment: 600 students

Staff: 40 certified staff

The student population is 80% Hispanic and 20% black. Nine in 10 students live in poverty, and half are English language learners. In one year, the school went from unacceptable to recognized in state ratings, meaning 75% of students achieved proficiency. The school virtually erased the achievement gap, notably in special education, language learners, and socioeconomically disadvantaged.

Q&A '‘We had a miraculous blossoming of kids’

BY VALERIE VON FRANK

Q. What was the turning point for your school?

The school had been rated academically unacceptable by the state for three years, for as long as the sanctions had been in place. The state was ready to close the school.

Q. What was the first thing you did as the new principal?

There were symbolic things that I changed to send a different message to those coming into the school. Then I put in place systems that caused a professional learning community to come together. Not only was everyone isolated in their own classrooms, but we needed to transform instruction if we wanted results. I got right in teachers' business to get rid of a worksheet philosophy.

On each grade-level team, individuals all are assigned roles. An instructional facilitator takes the lead on curriculum and acts as a liaison with me on lesson plans for each team; a business facilitator takes care of business, such as ordering supplies, turning in money for field trips, gathering lists or forms from the grade level instead of having five or six people giving me stuff; a positive behavior support facilitator manages building and classroom management strategies; and a campus improvement facilitator. Having those four roles on each team delegates responsibility and forces collaboration because teachers have to gather information from peers. I communicate with one representative for each grade level, which streamlines communication. Anybody can talk to me at any time, but this system solves simple things much more quickly.

Another system is weekly electronic staff meetings. We have professional learning after school. Any business or even culture-type things are taken care of in an electronic newsletter. There's a section for kudos, a section of what's going on on campus, deadlines for things that are due, and then there might be tips, such as ways to work with the class when kids are getting restless around Halloween or about a professional book I've been reading.

I have two instructional coaches to support teachers. They model teaching strategies and push in to work with guiding groups of kids. We hire substitutes to give teachers full days for lesson planning.

Q. Did you have to change staff to change results?

A lot of teachers left. They were not interested in this culture. We had to make some changes to get results. We got it done in one year with a different way of delivering instruction. I had a list of non-negotiables. We went from worksheets to guided instruction very quickly. There was a belief in the school that the kids didn't have what it took to achieve. After last year, people's beliefs have really changed. Teachers believe there isn't any child who can't do it if you approach them correctly and give them time and attention.

> **"We had to make some changes to get results."**

Q. What does it take to change beliefs?

Don't just get mad because teachers don't know what to do; show them. That's changing actions. But changing beliefs takes efficacy. When teachers saw their kids start to learn, their beliefs started to change. We had a miraculous blossoming of kids. All of a sudden, kids started to learn when we changed how we were teaching.

One size does *not* fit all

Pat Roy is co-author of *Moving NSDC's Staff Development Standards Into Practice: Innovation Configurations* (NSDC, 2003).

"❝**P**rofessional development is like going on a blind date—you just don't know what to expect until you show up."

This is one answer when educators were recently asked to write about their professional development experiences. An overarching theme in their experience is that sometimes professional development is great and at other times, a complete disaster. Their ultimate judgment depends on whether their professional development experience is relevant to them, their students, and their daily work.

> **NSDC STANDARD**
>
> **Learning**: Staff development that improves the learning of all students applies knowledge about human learning and change.

This theme parallels recent research findings from *Professional Learning in the Learning Profession* (Darling-Hammond et al., 2009). This study found that "professional development is most effective when it addresses the concrete, everyday challenges involved in teaching and learning specific academic subject matter" (p. 10). One of the implications of this finding is that the principal and the school should provide differentiated professional development experiences that reflect various needs and concerns of the faculty (Roy & Hord, 2003, p. 91).

Just as we differentiate student learning based on needs, we also ought to differentiate teachers learning experiences to meet their varying needs. Teacher data can be collected informally by the one-legged interview (Hall & Hord, 2006) or by asking staff members to indicate with sticky dots their current level of implementation on a skill development curve (NSDC, 2006). In a one-legged interview, leaders informally talk one-on-one with teachers, asking specific questions about their progress on using new information. These techniques could

uncover that a small group of teachers is having difficulty with managing new materials or needs to develop new classroom rules so that students can work well during small group learning time. Others might have passed those hurdles but now need to integrate a number of smaller strategies into a coherent set of classroom practices. Still others may need to analyze student work to determine the impact of new practices on student learning. Small learning groups can tackle these issues in collaboration with each other. Differentiation does not require separate formal workshops but rather entails providing time for small learning teams to engage in problem-solving protocols, researching classroom challenges, and reflecting on results.

These teams can be required to develop an explicit outcome and be expected to learn new information, implement new classroom practices, and report on the results of their learning. Team members become responsible for building their own professional knowledge and practice rather than depending on outside experts. This kind of differentiation not only builds internal faculty capacity and coherence but reinforces the professional role of educators to continue to build their skills and knowledge.

Changing classroom practice is a highly personal experience that entails developmental growth. Many formal professional development activities are designed for one-size-fits-all needs; differentiating professional learning can target specific needs and result in better implementation of new classroom practices. It is only when teachers use new practices that we can expect professional learning to improve student learning.

Learn more about NSDC's standards at www.nsdc.org/standards/index.cfm.

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PRINCIPAL-COACH PARTNERSHIP AGREEMENTS

P artnership agreements are a form of contract between a coach and his or her principal, teacher clients, or others with whom the coach may be working. The agreement describes the parameters of the work to provide both clarity and safety to the clients with whom the coach is forging agreements. The agreements typically are about the scope of the work, expected results, and other details associated with the coach's work with individuals or teams.

A coach and principal can form an agreement following a careful discussion to provide clarity. Agenda items for a conversation about partnership agreements are listed below with sample questions to guide agreement about each topic.

ROLES AND RESPONSIBILITIES

Principals and coaches reach agreement about the roles coaches will fill within the school; what other responsibilities they will have; and what coaches will not be doing.

COACH	PRINCIPAL
• What expectations do you have of me and the work I do? • What responsibilities will I have as a member of this staff? • What responsibilities will I have beyond my coaching responsibilities?	• What do you expect of me? • What do we think teachers expect of you? • What does the district expect of you?

CLIENTS, E.G. WHICH TEACHERS/GRADES/ DEPARTMENTS/TEAMS

Coaches also need to reach agreement with their principals about the clients or teachers with whom the coach will work. The options include teams of teachers, individual teachers, novice teachers, departments/grade levels/teams, etc.

COACH	PRINCIPAL
• Which teachers will I work with? • How will I determine which teachers to work with?	• Where are the greatest needs in our school? • Which teachers have expressed interest in receiving your support? • Our areas of greatest student need are ...

BOUNDARIES OF WORK

Clearly defining boundaries makes it easier for the coach to concentrate his or her efforts on areas with the potential for the greatest impact.

COACH	PRINCIPAL
• What are the boundaries of my work? • What is outside the boundaries of my work? • How do you feel about me ... e.g. serving on a district committee, facilitating a school committee, etc.	• What are the defined responsibilities of your role as a coach? • How much flexibility do we have to adjust your work to meet the needs of our students and staff?

SUPPORT AND RESOURCES NEEDED FOR SUCCESS

Agreements about support and resources give a sense of security to the coach and principal.

COACH	PRINCIPAL
• What resources are available for me? • Where will I meet with teachers? • What technology will be available for me? • Do I have access to money for professional publications or development?	• What support do you want from me? • What resources do you need to feel comfortable? • Here's how you will share in the school's resources for professional development ...

EXPECTED RESULTS

The expected results of a coach's work are most often determined based on the student achievement needs within the school and are always expressed in both process and results goals. Process goals describe how the coach will work; results goals describe the outcome of the work.

Process: The coach will work one-on-one with 75% of the staff and every grade level.

Results: Student achievement on the state math assessment will increase by 20% over the next two years.

COACH	PRINCIPAL
• What percentage of the staff do you expect me to work with? • What results do you expect over the next year, two years, and three years?	• What procedural goals are appropriate for your work in this school? • Here are the improvement goals we have …

TIMELINES

Setting timelines for achieving goals gives both the coach and the principal the ability to measure progress toward their goals so that they can make mid-course adjustments.

COACH	PRINCIPAL
• When do you want this finished? • What are the short- and long-term timelines for my work?	• When will you be able to meet with all departments? • When will you complete your one-on-one visits with every teacher?

COMMUNICATION

Coaches are more effective and focused in their work when they meet regularly with their principals, discuss where they focus their efforts, and determine how to support one another and the school's goals for student achievement.

COACH	PRINCIPAL
• When shall we meet to discuss my work plan? • How often shall we meet to discuss my work?	• When can we meet to discuss how you plan your work to serve teachers and contribute to school goals for student achievement?

PROCESSES

Coaches and their principals will want to reach agreement about what processes the coach will use for a variety of tasks. Most importantly, coaches and principals will want to determine whether coaches work on an as-requested basis or on an as-assigned basis. These decisions impact how coaches spend their time and have the potential for significant impact on the results of coaches' work.

COACH	PRINCIPAL
• What process do we want to establish to help teachers access my assistance? • What is the best way for me to spend the majority of my time? • How will I log my work? What evidence do you want?	• What process do you think will help teachers access your services easily and conveniently? • How will you demonstrate how you spend your time? • What evidence will you be comfortable providing me about your interaction with teachers?

CONFIDENTIALITY

Because norms about confidentiality vary so dramatically across states and districts, coaches and principals must clarify their agreements and others' expectations related to confidentiality.

COACH	PRINCIPAL
• What are your expectations related to the information you expect from me about my work with teachers? • What agreements can we make about confidentiality that will allow teachers to feel comfortable interacting with me, sharing their strengths and weaknesses, and being willing to take risks to change their instructional practices? • What is the best way for me to tell you when I feel you are asking for information that is outside our agreement area?	• What agreements do you think are important for us to make about confidentiality that will allow teachers to feel comfortable interacting with me, sharing their strengths and weaknesses, and being willing to take risks to change their instructional practices? • How will we monitor the agreements we make about confidentiality?

Source: Adapted from *Taking the Lead: New Roles for Teachers and School-Based Coaches,* by Joellen Killion and Cindy Harrison (NSDC, 2006).

Clarify the coach's role

"There wasn't a lot of information about coaching at that time," Simeral said. "I walked in with zero job description. The job role was something we had to learn through the process of working together. Nobody really understood our roles working together."

It's important to mutually define the role and both the principal's and coach's responsibilities, according to Hall and Simeral. Coaches may facilitate book studies, model lessons, help teachers analyze data, and observe classroom instruction and offer feedback, among other roles. (For more on coaching roles, see *Taking the Lead: New Roles for Teachers and School-Based Coaches,* by Joellen Killion, NSDC, 2006).

While the coach may take on different roles with various teachers depending on evolving circumstances, the principal and the coach should hammer out at least the boundaries between the coach and administrator. Hall noted that many school leaders are tempted to treat coaches as a second-in-command or assistant principal.

"The coach does *not* take on any administrative duties or any evaluative duties," Hall said. "That's where you can erode trust and relationships between the coach and teachers — put a *big* fence, barbed wire, armed guards; don't cross those lines."

Simeral said teachers often approach the coach, too, with issues that coaches must refer to the school leader. "Teachers come and share things," she said. "They come in with the principal's walk-through form and say, 'What does he mean by this?' Or they may be frustrated with the teacher next door. Those are the times, almost weekly, when I have a choice as a coach. Do I act as an administrator or refer them?

"It's not my job to solve those problems. I have to say, 'I really think you need to talk to the principal.' I'll work as a counselor and counsel them on how to deal with the issue, but I defer

things to the principal. Even if the administrator doesn't completely understand or see the role clearly, I can still as a coach know my role and where the line is drawn."

Clarity around the coach's role and purpose helps in communicating with staff, a key to coaching success, the two said.

COMMUNICATION

"If the staff is not on board and doesn't agree (with the concept of coaching), the role can be fraught with peril," Hall said. He said the principal must be absolutely clear with staff about the coach's role and purpose, what the coach does and does not do.

"My role is instrumental in helping coaches to be effective," Hall said. "I have to prepare our staff for the work coaches will be doing. As principal, I have to be clear on exactly what the coach's responsibilities are: what does coaching look like, what is it intended to do, what is the purpose? As we get deeper, I'm there to communicate, to share our focus, our mission, to keep everybody aligned, and to make sure it's happening."

Simeral said the coach must rely on the principal's support and leadership to reinforce with staff that the coach is not evaluating teachers and is not reporting her observations of teachers to the principal. Stating to the staff that the coach and principal are discussing schoolwide or grade-level data is critical, she said.

The principal also reinforces the importance of the coach's work. She recalled a situation in which a teacher used the time when Simeral was in the classroom to update computer records rather than observe the coach teaching. Simeral said the experience was a lesson for her in the importance of the principal and coach communicating about the coach's role with teachers.

The coach and principal also need to communicate. Simeral and Hall recommend creating

While the coach may take on different roles with various teachers depending on evolving circumstances, the principal and the coach should hammer out at least the boundaries between the coach and administrator.

NSDC'S BELIEF

Schools' most complex problems are best solved by educators collaborating and learning together.

Tips for principals working with instructional coaches

- Explain to staff — more than once — the coach's role and everyone's involvement in improving student achievement.
- Explain to the full faculty – probably more than once – that everyone will work with the instructional coach. Assure them that the coach does not report to the principal about classroom observations.
- Adopt the motto, "Everybody needs a coach!" From Peyton Manning to Oprah Winfrey to those who use a fitness coach to a principal who has a mentor – everyone needs a coach. Emphasize that "In this school, all of us will have a coach as all of us can improve on what we are doing."
- Use a faculty meeting for the instructional coach to facilitate staff learning.

Source: www.doe.in.gov/TitleI/pdf/instructional-coaches/newsletter_12-08.pdf.

regular times to meet together. Those conversations are crucial in establishing a relationship and a shared purpose, they said, especially for mapping a direction for the year's professional learning at the start of the school year. The coach must be clear about the principal's goals, and the principal must have clear expectations for how the coach will help achieve those.

"In the beginning, our conversations were along the lines of the principal saying, 'I need you to get into this teacher's classroom and help them with this…', " Simeral said. "There wasn't a lot of communication. Eventually we figured out where the line is for talking about a teacher, what the conversation between coach and administrator should look like and what it shouldn't. We'd talk about our goals, our vision for the school. Our conversations were not teacher-specific. They were about student data and trends in a grade level."

Simeral said she sets goals for her work with teachers, then makes sure the principal knows both the goals and any successes so he can reinforce the positive changes with the teacher. Some of those conversations are informal, hallway comments.

"He can't be everywhere in the school, so if something positive has come out of an experience with a teacher because of certain tools, I share that," she said.

COLLABORATION

Having a clear role understanding and communicating lead to a collaborative relationship that helps focus both the principal's and the coach's instructional leadership, Simeral and Hall said.

As the leadership team reviews data and clarifies goals, the coach's efforts home in on those areas and the principal then looks for teachers' improvements in areas that support those goals, they said, particularly as the principal is conducting walk-throughs.

In addition, Hall said, when the coach and principal work together to identify needs, he is better able to decide whether and how some teachers' needs might be met jointly and to assign appropriate time.

Simeral said the coach can help when the principal needs to clarify his or her thinking.

"Oftentimes," she said, "the administrator may not know or may not be as clear about a vision, and that's where the coach can be a sounding board to help the administrator find that focus. We can sit down together with the data, look at it and say, 'Where do we go next?' and collaborate."

SUCCESSFUL RELATIONSHIPS

Creating a successful partnership between the instructional coach and the principal requires listening, observing, setting goals, discussing philosophy, clarifying expectations, and support, said Hall.

"I have responsibility to be the head coach," Hall said. "Our leadership team did book and article studies. We started off making sure we were philosophically calibrated and that we were together. Then we could get on to the nitty-gritty of getting into classrooms and building teachers' capacity." ■

WHEN YOU DON'T HAVE A COACH

Principal Pete Hall suggests that leaders without coaching support try these strategies:

- Beg the district for additional support.
- Be a de facto coach in your building. There are difficulties, but you have the role as chief educational developer.
- Cultivate teacher leadership on your staff. Be an astute observer in the classroom and you'll notice the superstars.
- Create an environment in which it's OK to share expertise, rather than having excellence be stigmatized. "We need to start tooting more horns," Hall said. "It's our responsibility."

Free evaluation resource online

NSDC and the Maryland Department of Education have jointly released a resource guide for assisting schools and districts to evaluate the impact of teacher professional development on teaching practice and student learning.

Teacher Professional Development Evaluation Guide, written by M. Bruce Haslam of Policy Studies Associates, was developed originally for school districts and schools within the state of Maryland under contracts with Harford County Public Schools and the Maryland State Department of Education. NSDC supported modifications and enhancements to the resource guide to make it useful for schools and districts in all states and beyond. The guide is available on NSDC's web site at no cost.

The guide offers succinct recommendations for more frequent and more rigorous evaluation of teacher professional development to improve both the quality of professional learning and its results for teachers and their students.

In the first section of the guide, readers will find a series of questions for planning teams to consider as they start their work on an evaluation design. The guide continues with a discussion of different approaches to evaluation design and options for data collection. Additional sections cover the importance of monitoring the quality of evaluation data, strategies for data analysis, and advice on preparing evaluation reports. Appendices include references to additional resources and sample teacher surveys.

Download a PDF of *Teacher Professional Development Evaluation Guide* at www.nsdc.org/news/evalguide.cfm.

TEACHER PROFESSIONAL DEVELOPMENT EVALUATION GUIDE

M. BRUCE HASLAM
POLICY STUDIES ASSOCIATES
WASHINGTON, D.C.

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