

# JSD

THE LEARNING FORWARD JOURNAL

Principals ditch 'gotcha' in favor of growth p. 10

OBSERVATION TOOL CREATES LIGHT BULB MOMENTS FOR TEACHERS p. 30

LEARN HOW TO GIVE FEEDBACK THAT MAKES A DIFFERENCE p. 16

Top 10 learning needs for teacher leaders p. 48

## TEACHER EVALUATION

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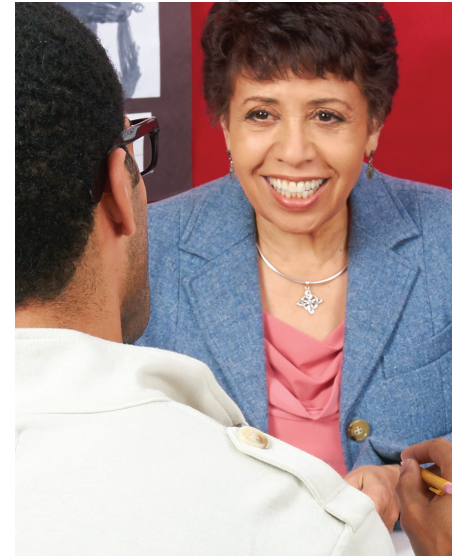
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# JSD

The  
Learning Forward  
Journal

theme **TEACHER EVALUATION**

DECEMBER 2014, VOLUME 35, NO. 6

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- Take your system to the next level
- Engaging teachers
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BY STEPHANIE HIRSH



## Here's another opportunity to talk about teaching

Teachers are in the spotlight. More than ever, people know how important teaching quality is to a student's learning experience.

Not surprisingly, the conversation about teachers isn't all necessarily productive or supportive. Recently, *Time* magazine stirred up quite a furor with its cover of an apple about to be smashed by a gavel, accompanied by the words, "It's almost impossible to fire a bad teacher."

While the article that the cover promoted could be part of an important conversation about teacher quality, the cover image contributed to what is already a tense atmosphere around how we talk about teachers. So what if, instead of talking about teachers, we talk about teaching instead?

We know that teachers are implementing new student standards — often while using new curriculum resources. We know they're concerned about upcoming assessments and striving to use technology in meaningful ways. And they're juggling all of this, as they always do, with myriad daily demands that are part of each day in a school.

So it's no wonder that teacher evaluation is a hot topic. Districts across the country are implementing or developing new evaluation systems

•  
**Tracy Crow ([tracy.crow@learningforward.org](mailto:tracy.crow@learningforward.org)) is director of communications for Learning Forward.**

for educators. Within this issue, you can read about systems that are finding ways to use evaluation to support teacher improvement. You'll also learn about strategies for how to approach evaluation so that feedback is useful and leads to deep learning.

When we look at examples of schools and districts that are able to turn evaluation processes into learning processes, we see one commonality even as different districts use different systems: Deep learning happens when educators have an opportunity to talk openly and frequently about teaching.

What if, when we talk about teacher evaluation, teacher quality, or teacher professional development, we reframe the conversation to how to improve teaching, not how to fix teachers? Let's talk about the act of teaching, and let's get really specific in those conversations.

When principals observe teachers in helpful ways, when coaches support job-embedded growth, when learning teams discuss a lesson, the possibilities for improvement happen when the discussion turns to the specifics. For example, when one teacher uses questions that have particular qualities, more of his students engage and respond, and their participation seems to have a positive impact on subsequent student work. What would it take for that teacher to ask those kinds of questions consistently? What does he need to understand to be able to use that strategy at the appropriate times in differentiated ways for particular



students? What skills will help him apply his knowledge of this strategy in other relevant situations?

To have those kinds of precise conversations, we need to consider and address many factors, whether in contexts that are labeled as evaluative, developmental, or collaborative. Such conversations happen most reliably when participants have trust, time, common language, shared goals, access to student data, and supportive supervisors and coaches. Comprehensive learning systems that are integrated with other district departments are essential to creating environments where talk about teaching can happen habitually.

Finally, talk about teaching is most meaningful when coupled with talk about learning. Effective teaching, by definition, leads to learning. That measure is always part of the equation if teaching talk is achieving its ultimate purpose. ■

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#### Developing facilitation and presentation skills for effective leadership

- Are you looking to feel prepared and confident when making a presentation or leading a group?
- How do you ensure your message is conveyed and understood as you intended and is persuasive?
- How can you get the results you want from group interactions and meet session objectives?

Build your facilitation and presentation skills and boost your group effectiveness in leading others in this session.

#### Learning-focused feedback: The key to educator effectiveness

- What types, purposes, and sources of feedback are effective in improving educator performance?
- How can feedback interactions be designed so that they promote change in practice?

Gain a deeper understanding of the feedback process and see how to employ it to promote increased educator effectiveness.

#### Transforming professional learning: Applying proven strategies and tools to elevate educator practice and student results

- Are you looking for solutions that will help your system prepare leaders at all levels to lead high-performing schools where all students succeed?
- Are you trying to build a collaborative learning community of district leaders who have a common moral purpose and work together to serve and support all schools?

Attend this session to find out how transformative professional learning systems have the power to change educator practice in ways that significantly improve student learning.



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## CLASSROOM-FOCUSED CONVERSATIONS

Education Post

Education Post is a nonpartisan communications organization dedicated to building support for student-focused improvements in public education from preschool to high school. Its website offers “a different conversation about public education and what our children need — an honest and civil conversation of many voices, united by a common belief in the power of education to transform lives.” Recent topics include “Bursting the standardized testing bubble,” “Demonstrating leadership in the over-testing debate,” and “Common Core helps North Dakota students dive deeper into reading.”

<http://educationpost.org>

## TOOLS FOR PRACTITIONERS

### Momentum

*Bill & Melinda Gates Foundation*

The Bill & Melinda Gates Foundation publication covers three major areas of focus: effective teaching, personalized learning, and college-ready expectations. In the September 2014 issue, the main topic is teacher evaluation, with articles on teacher teams in Batavia, Ohio, a project called Best Foot Forward, and a look at continuous improvement. The publication is a mix of downloadable PDFs, web pages and video, and includes links to resources from Gates Foundation partners.

<http://collegeready.gatesfoundation.org/momentum/september-2014>

## REACHING UNDERSERVED STUDENTS

### Linked Learning: Using Learning Time Creatively to Prepare Students for College and Career

*Center for American Progress & Alliance for Excellent Education, October 2014*

This report highlights the efforts of high schools implementing a California-led initiative called Linked Learning in the Los Angeles Unified School District, Oakland Unified School District, Porterville Unified School District, and Sacramento Unified School District. The reform effort reconfigures the use of time in order to provide underserved students with a more effective learning experience. The report recommends that districts give schools flexibility to redesign schedules to give teachers and students time to implement effective approaches to high school reform and calls for funding to be used for common planning time and professional learning between career and technical education and academic teachers.

[www.americanprogress.org/issues/education/report/2014/10/07/98462/linked-learning](http://www.americanprogress.org/issues/education/report/2014/10/07/98462/linked-learning)



## SYSTEMWIDE REFORM

### Innovating Toward a Vibrant Learning Ecosystem: Ten Pathways for Transforming Learning

*KnowledgeWorks, 2014*

KnowledgeWorks created an innovation pathways framework to help education stakeholders become active agents of change. The framework identifies 10 key systemic levers of transformation that together promise to create a learning ecosystem that is vibrant for all learners. These levers include learning cultures and structures, human capital, data, assessment, leadership, and policy. The innovation pathways fall into two categories: transforming the core of learning and transforming supporting systemic structures. This report details each of the pathways, with suggested strategies for how, over time, educators might move toward that vision.



## URBAN SCHOOLS

### The 2014 Broad Prize

*The Eli and Edythe Broad Foundation*

For the first time in its 13-year history, the Broad Prize for Urban Education has been awarded to two school districts: Gwinnett County Public Schools in Georgia and Orange County Public Schools in Florida. The \$1 million prize honors urban school districts that demonstrate the greatest overall performance and improvement in student achievement while reducing achievement gaps among low-income students and students of color. Learn more about the winning districts, see a video about the 2014 finalists, or explore the process and criteria for the prize.

[www.broadprize.org/past\\_winners/2014.html](http://www.broadprize.org/past_winners/2014.html)

**PREPARING FOR COMMON CORE**  
**Common Core State Standards & the**  
**Transformation of Professional Development**  
*Education First, Summer 2014*

In a series of three reports, Education First looks at what educators need to succeed with the Common Core. The first brief describes and illustrates three elements that research shows to be the backbone of any serious approach to engage and prepare teachers for the Common Core. The second brief spotlights how three new professional learning approaches have played out across the country. The last brief addresses what policymakers can do to advance high-quality professional development at scale.

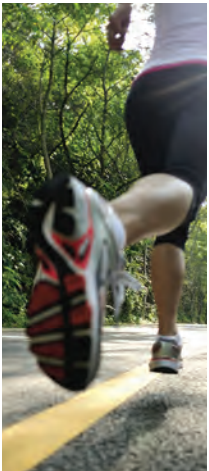
[www.education-first.com](http://www.education-first.com)



**TEACHER LEADERS**  
**Teacher-Led Professional Learning**

The Teacher-Led Professional Learning website is a project of the Pahara-Aspen Teacher-Leader Fellows program. The program's goal is to help teachers, schools, unions, and districts implement collaborative, job-embedded professional learning that leads to better student learning by developing and using the skills of involved teacher leaders. Program strategies fall in three categories: Build capacity, build awareness, and implement. The website walks readers through the steps necessary to design a teacher-led, job-embedded professional learning system, with resources to guide each step. Topics include defining teacher leader roles; selecting, training, and evaluating teacher leaders; finding time for professional learning; funding; and leading successful teams.

<http://teacherledprofessionallearning.org>



**EVALUATION REFORM**  
**Teacher Evaluations in an Era of Rapid Change: From "Unsatisfactory" to**  
**"Needs Improvement"**

*Bellwether Education Partners, August 2014*

The authors examine what can be learned so far from the effort to revamp teacher evaluations. Using data collected from 17 states and the District of Columbia, they note that districts are starting to evaluate teachers as professionals; schools are providing teachers with better, timelier feedback; districts still don't factor student growth into teacher evaluation ratings; districts have wide discretion; and districts continue to ignore performance when making decisions about teachers. Based on this research, policymakers are urged to track the data, work closely with districts, give reforms time to take effect, and understand that evaluation reform can coexist with other changes.

<http://bellwethereducation.org/publication/teacher-evaluations-era-rapid-change>

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**HOW TO GET IN TOUCH**

*JSD* is published six times a year to promote improvement in the quality of professional learning as a means to improve student learning in K-12 schools. Contributions from members and nonmembers of Learning Forward are welcome.

**Manuscripts:** Manuscripts and editorial mail should be sent to Christy Colclasure ([christy.colclasure@learningforward.org](mailto:christy.colclasure@learningforward.org)). Learning Forward prefers to receive manuscripts by email. Notes to assist authors in preparing a manuscript are provided at [www.learningforward.org/publications/jsd/writers-guidelines](http://www.learningforward.org/publications/jsd/writers-guidelines). Themes for upcoming issues of *JSD* are available at [www.learningforward.org/publications/jsd/upcoming-themes](http://www.learningforward.org/publications/jsd/upcoming-themes).

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JOURNAL OF STAFF DEVELOPMENT  
 ISSN 0276-928X

*JSD* is a benefit of membership in Learning Forward. \$89 of annual membership covers a year's subscription to *JSD*. *JSD* is published bimonthly. Periodicals postage paid at Wheelersburg, OH 45694 and additional offices. Postmaster: Send address changes to *JSD*, 504 S. Locust St., Oxford, OH 45056.

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# In my view: THIS IS OUR EDUCATOR

For each statement below, mark how you would assess your school, district, or organization's educator evaluation system.

		ALWAYS	SOMETIMES	NEVER
1	Our evaluation system supports the ongoing development of educators.			
2	Our evaluation system gives educators valuable feedback to support their growth as individuals.			
3	Our evaluation system gives educators valuable feedback that supports their collaborative learning work at the team level.			
4	Our evaluation system gives educators valuable feedback that supports their collaborative learning work at the school and/or system level.			
5	Our evaluation system connects individual improvement goals to team, school, and/or system goals.			
6	Our evaluation system offers support to individuals at every level — teachers, school leaders, and central office leaders.			
7	Our evaluation system includes sufficient support for the supervisors, observers, and others with roles conducting evaluation processes.			
8	Our evaluation system is evolving to better meet the needs of our school or district.			

IN THIS ISSUE OF JSD

THE LEARNING STARTS HERE ▼

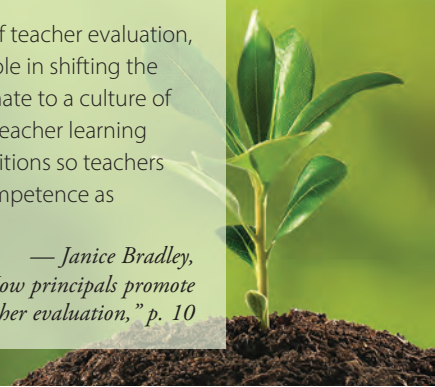
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powerful words

“In the current context of teacher evaluation, principals serve a key role in shifting the punitive ‘gotcha’ school climate to a culture of growth and excitement for teacher learning by creating supportive conditions so teachers develop confidence and competence as effective educators.”

— Janice Bradley,

“From ‘gotcha’ to growth: How principals promote learning in the context of teacher evaluation,” p. 10





# EVALUATION SYSTEM TODAY

## HOW CAN I HELP? TAKING OUR EVALUATION SYSTEM TO THE NEXT LEVEL

<b>A</b>	Of the questions on p. 8, my greatest challenge or concern is related to:
<b>B</b>	What one or two goals can I work on to advance how our evaluation system supports educators' continuous improvement?
<b>C</b>	What do I need to learn to achieve my evaluation system-related goals?
<b>D</b>	With whom can I work to advance how our system supports continuous improvement?
<b>E</b>	What will be indicators of success that I am helping to advance how our system supports continuous improvement?

### ENGAGING TEACHERS IN EVALUATION REFORM

Too often, teachers' voices are left out when new teacher evaluation systems are designed and implemented because it can be difficult to incorporate them. A website developed by Public Agenda and American Institutes for Research, with support from the Bill & Melinda Gates Foundation, provides strategies to include teachers in the conversation.

The Everyone at the Table materials are designed to facilitate teacher involvement in evaluation reform. Materials can be used independently, as part of a task force, or with engagement teams. Topics include:

- Sample plans for teacher conversations;
- Strategies and tips for recruiting teachers;

- Strategies for convening engagement teams;
- Videos and PowerPoint presentations;
- Guides for moderators and leaders; and
- Teacher handouts.

The moderator's guide describes activities that can be used during discussions of teacher evaluation systems. Teacher handouts can be downloaded individually, and all documents are provided in Microsoft Word so that users can edit and adapt them to meet the specific needs of their school, district, or state.

[www.everyoneatthetable.org](http://www.everyoneatthetable.org)

includes materials for principals, superintendents, other administrators, and teachers that are flexible, practical, effective, and meant to be adapted to fit specific contexts.

**PRINCIPAL STRATEGIES FOR TEACHER GROWTH**

- **CREATE** a shared vision of classroom practices before school starts.
- **PROTECT** professional learning community time.
- **ALLOCATE** funds for substitutes.
- **SUPPORT** teachers who get an ineffective rating.

# FROM 'GOTCHA' TO GROW

HOW PRINCIPALS PROMOTE LEARNING IN THE CONTEXT OF TEACHER EVALUATION

## HOW DO YOU SUPPORT TEACHERS THROUGH THE EVALUATION PROCESS?

**"Teachers are allowed to make decisions about their visions, and opportunities are provided so teachers can take risks and grow and learn from mistakes. This is not a 'gotcha.'"**

— High school assistant principal

### By Janice Bradley

**I**mplementing teacher evaluation systems across the United States has created both challenges and opportunities to improving teacher quality.

Lessons learned at the state level illustrate a wide range of challenges with system implementation, including value-added growth scores, implementation timetables, and human capital demands (McGuinn, 2012), but what are we learning about teacher evaluation at the school level?

During a recent professional learning session, a group of K-12 teachers reflected on their interactions and experiences about campus principals and teacher evaluations. This question launched the conversation: *"How is the principal promoting your professional growth using teacher evaluation?"*

From that came this exchange:

**A: It depends on the principal.**

*Q: What do you mean?*

**A: The principal either talks with teachers like evaluations are a "gotcha" or a "growth."**

*Q: What is the difference between "gotcha" and "growth"? What does that sound like?*

**A: "Gotcha" means that my principal finds everything wrong during the evaluation and tells me to improve. "Growth" means that I know what my strengths are, yet there is room for improvement. Also, there are opportunities at school to learn to get better. I'm encouraged and hopeful and know I'm not alone.**

What principal actions and behaviors cause teachers to perceive evaluation as "growth," not "gotcha"?

When several teachers described teacher evaluation as a growth place at their school, it was time to dig deeper



into how principals intentionally promote the creation of a culture that supports teachers' growth.

After interviews with four principals and two teachers at each school, two themes emerged:

1. Supportive conditions exist for professional growth; and
2. Teachers are empowered to choose learning designs connected to the classroom.

Let's look at the actions of principals who structured schools to create supportive conditions for teacher growth aligned to the evaluation system and empowered teachers to make decisions about selecting learning designs. Their words and actions are real, although the names are not. From this, we can identify the effects of those actions in the classroom.

Principals' actions are supported by research on effective principals (Fullan, 2014) and from the Leadership and Learning Designs standards of Learning Forward's Standards for Professional Learning (Learning Forward, 2011).

#### **CONDITIONS FOR GROWTH**

Principals who got it — meaning they supported teacher growth — recognized that if teachers were to become ef-

fective as defined by their state's teacher evaluation rubric, they needed to create structures for job-embedded professional learning, along with developing whole-staff capacity for shared ownership in the teacher evaluation process.

Strategies included creating a shared vision of classroom practices before school starts, protecting professional learning community time, allocating funds for substitutes, and supporting a new teacher who received an ineffective rating after her first evaluation.

#### **Create a shared vision.**

Christina Valant, an elementary principal, activated teachers' core beliefs and values by asking at the beginning of the year, "What are five practices that should be in every classroom every day to support student learning?"

Teachers individually wrote five practices on sticky notes, shared with a small group by clustering everyone's sticky notes into themes, and agreed on the five practices at small table groups. Each table posted its practices, then

**When several teachers described teacher evaluation as a growth place at their school, it was time to dig deeper into how principals intentionally promote the creation of a culture that supports teachers' growth.**



staff came to group consensus on five.

Practices whole staff believed should be in every classroom every day included:

- High levels of student engagement;
- Language-rich environment including content vocabulary;
- Use of high-level questioning by both students and teachers to elicit evidence of understanding;
- Development of problem-solving and thinking skills; and
- A collaborative learning environment where students are respectful and have ownership of their learning.

How did teachers know that the five practices from their beliefs and experiences were the ones that support student learning? Teachers aligned the five practices with the teacher evaluation rubric's effective/highly effective indicators and discovered that every one of the five practices was described in three domains: planning, learning environment, and instruction.

"Teachers were asked what they valued first, then aligned their core beliefs and experiences to the teacher evaluation rubric," Valant says. Staff co-created the schools' shared vision, then embedded professional learning aligned with teacher evaluation into the school — an action exemplifying the Leadership standard (Learning Forward, 2011).

### **Protect professional learning community time.**

Marissa Becker, assistant principal at a high-performing high school in a high-poverty rural district, said the most important action she took to create supportive conditions was to protect teachers' professional learning community time. External forces, such as school scheduling and district restructuring, threatened common time for the math department to continue meeting weekly in its professional learning community.

"Amidst constant change and new initiatives, the professional learning community served as a growth place over several years, allowing the math teachers to take charge and grow as a group," she said. "The professional learning community is the one place teachers can learn, reflect, and move forward."

Becker protected the structural conditions, time, place, and resources for the math department to meet, one of the research-based dimensions of professional learning communities as well as the Learning Communities standard (Hord, 2009; Learning Forward, 2011).

### **Say yes to substitutes.**

Valant and Maria Kaldas, also an elementary principal, granted teacher requests for substitutes to engage in learning designs connected to the classroom despite minimal funds.

"When the teachers asked for substitutes, we made that happen and did not say no," Valant says. "The staff genuinely loves learning and getting into each other's classroom with a purpose. It is exciting for them and for us as administrators."

Kaldas said, "Teachers love to get to see each other at work and to learn from each other. You have to draw on innate teach-

ers' passions, abilities, and beliefs. Teachers need to be encouraged to develop on a positive note. They must have passion and spark and something to get excited about in the current system. It's hard for everyone right now, and we have to support the teachers."

In a context of mandates and directives, Valant and Becker said yes to teachers for time to collaboratively design lessons, share lesson enactment in the classroom, collect data (artifacts of practice such as student work, iPad pictures, and anecdotes), and analyze student data to assess student understanding of the standards.

These principals maintained a persistent focus on teacher professional learning as indicated in the Leadership standard as they enabled teachers to have time to learn in the instructional core (Learning Forward, 2011; City, Elmore, Fiarman, & Teitel, 2009).

### **Support teachers who get an ineffective rating.**

Carla Stenson, an elementary principal, gave a rating of "ineffective" to Alesia Soltero, a first-year teacher, on her first evaluation. In order to support the teacher, Stenson requested that Soltero participate in a school-based professional learning design where the grade-level team planned a lesson, one teacher facilitated the lesson while other teachers observed, then reflected and revised the lesson based on students' engagement.

Soltero observed, learned strategies, then practiced in her class. One week later, her next evaluation received a minimally effective rating — one level forward with room to grow.

What would have happened to Soltero's self-confidence and motivation toward teacher effectiveness had Stenson not provided her with support to learn how to teach differently? As a supporter of professional learning, Stenson applied her understanding of human needs to create the conditions for Soltero to be successful, an action supported by the Leadership standard (Learning Forward, 2011).

### **TEACHERS' CHOICE**

Principals intentionally structured their school to align job-embedded professional learning with the teacher evaluation domains and empowered teachers to select learning designs where they could develop a deeper understanding of effective practices in a collaborative setting with peer and coach feedback.

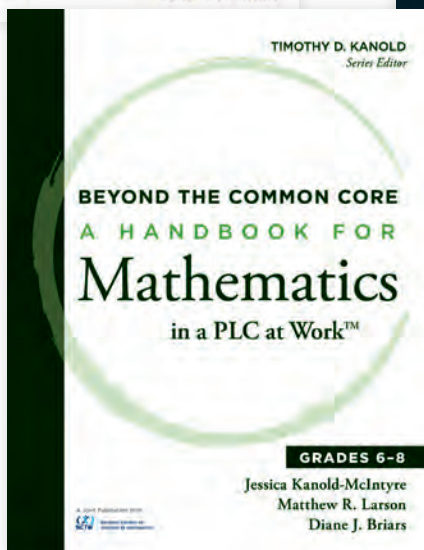
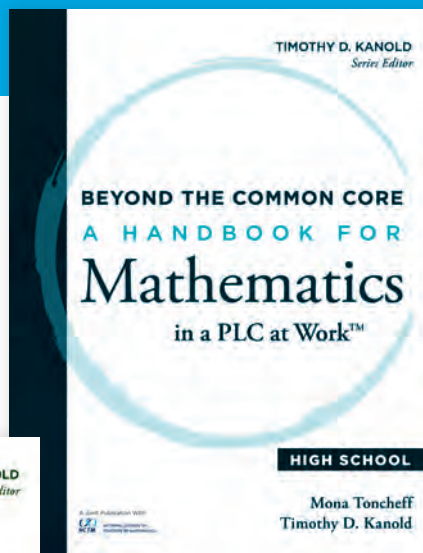
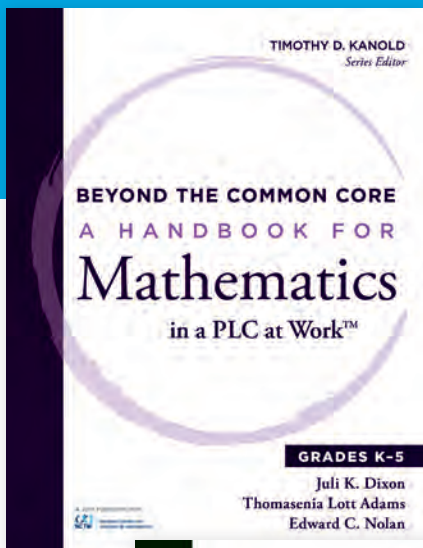
Teachers selected a learning design at the beginning of the school year based on where they could learn to be effective or highly effective on one of the five agreed-upon practices aligned with teacher evaluation domains.

A menu of nine learning designs — co-created by teachers, instructional coaches, principals, and a university partner, and informed by the work of Lois Easton (2008) and the Learning Designs standard — was offered to staff.

Teachers selected a design and committed to implementing two design cycles — one in the fall and one in the spring before

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the state testing window, totaling nine to 12 hours of focused, job-embedded professional learning.

A collaborative design cycle consists of one hour planning, one hour enacting in the classroom, and one hour assessing or reflecting on results. Design choices included:

- Studying video with application;
- Vertical team study;
- Collaborative planning, teaching, and assessing;
- Lesson study;
- Peer teaching;
- Intentional practice with feedback;
- Using technology;
- Creative and innovative teaching; and
- Sharing classroom learning with teachers, coach, and principal.

As a result of participating in two cycles of the vertical team learning design, Cathryn Minson and Bobbi-Lyn Davila, two of six 1st-grade and kindergarten teachers who participated in vertical team study, say they recommend vertical team to others. “Vertical team allows for focused conversations, develops a shared goal with the team, and gives us an opportunity to learn and see practices aligned to teacher evaluation that we put into practice with other teachers,” they report.

Valant, the principal, says, “Teachers have choices as to what and how their learning takes place. I saw teachers selecting learning designs as a way to connect professional development to teacher evaluation, put it in the classroom, and sustain that learning over time so we can see the effects in the classroom and with students — the place where you want to see the biggest impact of professional development.”

Using the Learning Designs standard for direction, teachers’ choices of learning designs promoted active engagement in their own learning, meaning teachers interacted with focused content and learned collaboratively with one another.

### IN THE CLASSROOM

Using evidence from classroom walk-throughs and formal teacher evaluations, principals and teachers are seeing changes in the classroom, specifically focused on the five practices chosen by staff at the beginning of the year.

For example, one elementary principal says she sees higher levels of student engagement from the team engaged in the vertical team study design, where teachers intentionally studied strategies through case studies and video that promoted student-to-student discussion.

Another principal observed more frequent use of higher-level questioning during lessons from the group studying and intentionally practicing questioning strategies. The high school assistant principal observed students using more content vocabulary in their small-group math interactions.

An instructional coach says, “Our principal supports giving teachers the confidence to know that they can be effective, and

we are seeing changes in their teaching.”

A 2nd-grade teacher reports, “We are spending more time studying videos from our lesson study and learning how to differentiate and make changes for students.”

### PRINCIPALS ARE KEY

In the current context of teacher evaluation, principals serve a key role in shifting the punitive “gotcha” school climate to a culture of growth and excitement for teacher learning by creating supportive conditions so teachers develop confidence and competence as effective educators.

Principal actions supporting teachers include:

- Begin the year with teachers creating a shared vision of what should be in every classroom every day;
- Honor teacher professionalism by aligning their five practices to the teacher evaluation rubric;
- Protect time for teacher collaboration;
- Empower teachers to select learning designs; and
- Structure school so teachers have time and resources to implement the designs.

Teacher evaluation is well-intentioned, with visions of promoting teacher effectiveness, yet implementation of new teacher evaluation systems can be stressful and anxiety-producing for educators at all levels of a school system.

Teacher evaluation is also imperfect, complex, and evolving and may not be the quick fix to ensuring there is an effective teacher for every child. Yet there exist knowledgeable, thoughtful, and compassionate principals who design schools so teachers can learn deeply, passionately, and meaningfully.

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# TELL ME SO I CAN HEAR



**A DEVELOPMENTAL APPROACH TO FEEDBACK  
AND COLLABORATION**

**By Ellie Drago-Severson and Jessica Blum-DeStefano**

*“The best leaders know how to help teachers grow. ... They know how to offer feedback so that teachers can improve practice and grow themselves in order to help students succeed. How can I make this happen?”*

*— High school principal*

**F**eedback plays an important role in education. New teacher and principal evaluation systems, the Common Core State Standards, and Race to the Top initiatives, among others, underscore the critical importance of giving and receiving meaningful, actionable, and effective feedback to colleagues — regardless of their roles in schools.

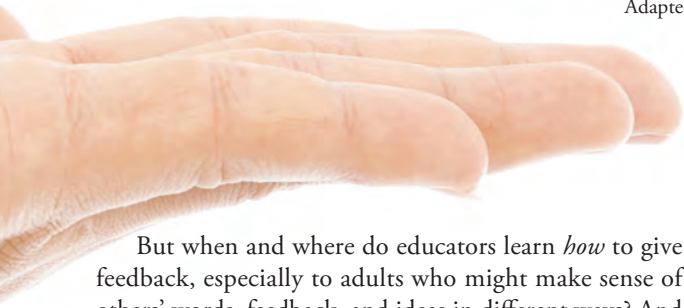


## WAYS OF KNOWING: DEVELOPMENTAL SUPPORTS AND CHALLENGES

This table provides an overview of the different types of things that will feel supportive and challenging during feedback to adults with the four ways of knowing described in this article. Both support and challenge are integral to growth. When reviewing this list, think about what other kinds of insights, reflections, or questions you might have and list them in the space provided.

Way of knowing	Feedback supports	Feedback challenges	Reflections
INSTRUMENTAL	<ul style="list-style-type: none"> <li>Concrete suggestions, models, and examples.</li> <li>Recognition of what went right and wrong.</li> </ul>	Encourage consideration beyond “right” solutions for teaching and leading, and scaffold abstract thinking.	
SOCIALIZING	<ul style="list-style-type: none"> <li>Appreciation for effort and contribution.</li> <li>Validation of progress and personal qualities.</li> </ul>	Invite expression of own beliefs about practice in safe contexts. Model and role-play conflict that does not threaten relationships.	
SELF-AUTHORING	<ul style="list-style-type: none"> <li>Acknowledgement of competence and expertise.</li> <li>Opportunities to discuss own ideas, develop own goals, and critique and design initiatives.</li> </ul>	Encourage exploration of new and different ideas, values, and approaches — both professionally and personally.	
SELF-TRANSFORMING	<ul style="list-style-type: none"> <li>Opportunities to collaboratively reflect on practice and explore alternatives, contradictions, and paradoxes (internal and systemic).</li> </ul>	Gently support management of the implicit frustrations and tensions of transformation and change.	

Adapted from **Drago-Severson (2009)** and **Drago-Severson & Blum-DeStefano (in press)**.



But when and where do educators learn *how* to give feedback, especially to adults who might make sense of others’ words, feedback, and ideas in different ways? And how might an educator’s own inclinations and orientations influence how others give and receive feedback?

A new and promising developmental approach to feedback, called feedback for growth (Drago-Severson & Blum-DeStefano, in press), builds on what the field has taught educators about effective feedback and offers something more. “Growth” refers to the expansion of educators’ internal capacities that enable them to better manage the complexities of learning, teaching, leading, and living (Drago-Severson & Blum-DeStefano, in press).

Specifically, feedback for growth involves intentionally differentiating feedback so that adults, who make meaning in qualitatively different ways, can best hear it, learn from it, take it in, and improve their instructional and leader-

ship practice. Research suggests that most adults make meaning with one of four different developmental systems, or ways of knowing: the instrumental, socializing, self-authoring, or self-transforming.

These ways of knowing are often described as the lenses — or filters — through which adults interpret their worlds, as they fundamentally influence how we make sense of our experiences, feedback, and relationships. More specifically, in the case of feedback, it might be even more helpful to think about ways of knowing as the audio frequencies with which we hear.

In other words, our ways of knowing predispose us to the kinds of feedback we find supportive or disconcerting, helpful or disorienting. Put more simply, our ways of knowing determine those aspects of feedback we can tune into and those we tune out (even unintentionally).

Understanding our own and others’ ways of knowing — and how this influences how we give and receive feedback for growth — can help educators expand what they already know about good feedback and learn more about what they still need to improve. A working understanding of adult developmental theory (Drago-Severson, 2004, 2009, 2012; Drago-Severson & Blum-DeStefano,

in press; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Kegan, 1982, 1994, 2000) can also help educators — and educational leaders — reframe feedback as an opportunity to support colleagues’ internal growth *and* observable professional practice — as these things are ultimately and intimately related.

### A NEW PERSPECTIVE ON FEEDBACK

The need to do feedback better is evident in the mixed results of current evaluation policies, which place feedback front and center on the reform stage but yield only limited returns in student achievement (Hallinger, Heck, & Murphy, 2014).

The need for a different kind of feedback also echoes in the hopes and challenges of educational leaders who have shared their feedback experiences with us in university leadership preparation courses, professional development workshops, and other professional learning initiatives.

For example, in a 2014 survey of district and school leaders in New York City, 75% responded that giving feedback was the “most important skill” they want to build and grow, particularly in relation to having difficult conversations. This, we have learned, is a hope shared by educators in many different roles.

As one state-level educational leader explained, “Collaboration is a mandate — that’s why feedback is so important. ... We need to learn how to build capacity at all levels: with principals, assistant principals, and teachers.”

Feedback scholars have likewise pointed to specific challenges that mirror practitioners’ reflections and can complicate the exchange of feedback in both school systems and corporate contexts, including:

- A general lack of meaningful feedback or authentic collaboration;
- The extensive time demands of many formal evaluation systems (particularly in schools);

- The frequent lack of consistency among evaluators;
- The one-size-fits-all approach often adopted by feedback givers; and
- Colleagues’ overreliance on positive or superficial feedback (to protect relationships and/or the status quo) (Danielson, 2011; Darling-Hammond, 2013; MacDonald, 2011; Marshall, 2013; Stone & Heen, 2014).

As this list makes clear, educators need to be able to more safely and comfortably provide each other with their best thinking about practice in order to shift the culture of feedback and enact meaningful change. This list does not, however, offer insight into why these things are so hard.

### WHY WAYS OF KNOWING MATTER

While there are many important components to effective feedback (including budgeting of time, content expertise, and the larger organizational context), a developmental lens helps to illuminate the critical influence of an underrecognized form of diversity — developmental diversity — that runs through almost every team, school, or organization.

To illustrate, here is a brief look at the different ways adults with each of the most common ways of knowing — the instrumental, socializing, self-authoring, and self-transforming — experience feedback.

#### INSTRUMENTAL KNOWERS:

##### “Tell me what I need to do.”

*“My principal helps me with her feedback because she provides me with models and step-by-step directions. I like to know what’s expected of me.”*

Adults with an instrumental way of knowing orient to the rules and generally understand their experiences — and feedback — in concrete, dualistic terms. In other words, instrumental knowers believe that there are right and wrong answers to problems, and right and wrong ways to do things, think, and behave.

They want to know, when receiving feedback, what they did right and what they did wrong. Giving detailed, concrete examples and specific models to emulate when offering feedback will be supportive to instrumental knowers.

When giving feedback, instrumental knowers likewise rely on policies and procedures and may have difficulty taking others’ perspectives in relation to a question or debate about instructional practice. From an instrumental knower’s perspective, what is there to argue about when there is clearly a correct way to do things?

#### SOCIALIZING KNOWERS:

##### “Make me feel valued.”

*“My principal gives great feedback. She always makes a point to emphasize what I’m doing well and offers suggestions for improvement in caring ways that affirm my value to her and the school — not just as a teacher, but as a person. That means a lot to me.”*

### HOW TO CREATE A FEEDBACK CULTURE

The following tips and reflective opportunities can help create a feedback culture for growth in your school or district:

- Share developmental ideas with colleagues. This can help establish a common language and lens for thinking and talking about feedback.
- Ask colleagues how you might best support them when offering feedback. What, for instance, would feel most helpful to them? Generally, people are willing to share their needs when they feel safe and respected.
- Consider how your own way of knowing might influence your preferences for giving feedback. Are there ways you might expand your style or approach to more effectively help colleagues tune in to your feedback?





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## FEEDBACK STRATEGIES

The feedback literature highlights five key strategies for offering effective feedback. A developmental perspective can help educators deepen and broaden their understandings of these strategies.

	Strategy for effective feedback	Developmental extensions
1	<b>Individualize feedback for the receiver.</b>	Effective feedback is tailored to individuals' strengths and limitations, personalities and preferences, and developmental orientations and capacities (ways of knowing). Differentiating feedback — and asking adults what feels most supportive to them — can help educators better meet colleagues where they are in the psychological sense.
2	<b>Offer specific, focused feedback.</b>	While effective feedback is often specific and focused, it is also important to remember that people with qualitatively different ways of knowing will experience direct feedback differently — even if that feedback is offered in exactly the same way. Understanding this has implications for not only what is said, but how it is said.
3	<b>Maintain a positive, compassionate focus during feedback and other communications.</b>	Building — and modeling — the norms of safety, care, and collaboration require intentionality and an awareness of developmental diversity. Asking adults to share their preferences and needs for feedback can be a helpful starting place for building trust with individuals and groups.
4	<b>Ensure regular and ongoing feedback.</b>	A developmental perspective underscores the importance of meeting adults where they are psychologically and remaining present to them as they change and grow. A key insight here is that your feedback and communications may also evolve over time to keep pace with those in your care.
5	<b>Provide feedback recipients with opportunities to respond, reflect, and contribute.</b>	It is important to understand that adults will orient differently to self-direction, as taking a perspective on one's self and others — and voicing one's own opinions and suggestions — all require corresponding internal capacities.

Adapted from Drago-Severson (2009) and Drago-Severson & Blum-DeStefano (in press).

While socializing knowers have developed greater capacities for abstract thinking and relating, they feel responsible for valued others' feelings and, in turn, hold other people responsible for their own.

This means that socializing knowers often internalize supervisors' assessments as their own. In other words, they might think, "If you think I'm doing a good job [with my teaching or leadership], then I am. If you don't, then I'm not."

Since socializing knowers orient strongly to the human qualities of a relationship (e.g. kindness, care), it is important to acknowledge and attend to these when giving feedback to an educator with this way of knowing. Similarly, it may be helpful to understand that giving feedback — especially critical feedback — can be difficult for socializing knowers, as conflict is experienced as a threat to one's very self.

### SELF-AUTHORING KNOWERS:

#### "Let me demonstrate competency."

*"I appreciate my principal's feedback and value her perspective, although I might not always agree with or implement her suggestions. I especially appreciate the freedom she gives me to develop my own goals — and even offer feedback to her on her leadership practice."*

Educators with a self-authoring way of knowing have grown to have perspective on their feelings and interpersonal relation-

ships. Unlike socializing knowers, they have the internal capacity to prioritize them and reflect on them.

In addition, they can assess other people's expectations and judgments of them in light of their own. They have their own bench of judgment, so, when considering another person's feedback — whether a colleague or a supervisor — they decide for themselves what they are doing well and what they want to improve.

In a feedback exchange, self-authoring knowers value opportunities to voice their own opinions, offer suggestions and critiques, and formulate their own goals. On the other hand, self-authoring knowers cannot objectively see their own value propositions and ideologies so may have trouble taking in ideas and perspectives that are diametrically opposed to their own.

### SELF-TRANSFORMING KNOWERS:

#### "We can figure this out together."

*"My principal invites me into dialogue, and we encourage each other to consider things differently. The chance to exchange ideas and perspectives about teaching is what I value most about our feedback meetings."*

Increasingly, a small number of adults — about 9% to 10% of the U.S. population (Kegan & Lahey, 2009) — are developing a way of knowing beyond the self-authoring, which we call



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the self-transforming way of knowing (Drago-Severson, 2004, 2009, 2012).

Adults with a self-transforming way of knowing are more open to others' points of view, standards, ideologies, and beliefs. As both feedback givers and receivers, self-transforming knowers see interconnection as a strength and opportunity, and are able to examine issues from multiple points of view. They appreciate receiving feedback as a chance to grow and develop a bigger version of themselves.

### PRACTICAL APPLICATIONS

Adults with each way of knowing have both strengths and limitations and require different kinds of supports and challenges in order to grow and learn. How should those responsible for giving feedback to educators across the developmental spectrum differentiate their feedback to better meet educators' needs? And how might these developmental insights shed new light on common feedback challenges, such as the ubiquity of positive and surface-level feedback, evaluators' overreliance on a single approach to feedback, and/or inconsistent feedback messages?

The table on p. 17 lists the developmental supports and challenges of the four ways of knowing and includes space to add reflections on each one.

A developmental lens can help educators deepen and extend some of the key strategies for effective feedback described in the wider literature for both business and education. The table on p. 20 offers developmental extensions of five feedback suggestions widely recognized by scholars (e.g. Buron & McDonald-Mann, 2011; Stone & Heen, 2014).

While the practical applications of feedback for growth are new and numerous, one hopeful truth informs all of these ideas: We can all continue to grow professionally and developmentally.

Much like Carol Dweck's (2007) concept of a growth mindset — an orienting belief that personal qualities and skills are not fixed, but rather can be developed over time through nurture and effort — a developmental perspective reminds us that adulthood can be a rich time of growth and learning. Indeed, if adults benefit from feedback, relationships, and contexts that meet them where they are in their ways of knowing and learning, the possibilities seem limitless.

A developmental approach to feedback can shed new light on the important work of educational leaders and feedback scholars across different disciplines and fields.

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# TWO SIDES *of the* COIN

## EVALUATION AND SUPPORT WORK TOGETHER TO STRENGTHEN TEACHING

By Jane Kise

**O**n your first day of teaching, did each student listen to your every word? Did their work show mastery of the learning goals you'd set? Or did you, like me, glance through papers thinking, *How could my instruction possibly have prompted these essays?* Then again, perhaps the work quality wasn't as big a first-day concern as classroom management, the quiet little boy who would not participate, or how





## THE POLARITY APPROACH TO CONTINUITY AND TRANSFORMATION (PACT)

THE PACT MODEL INCLUDES FIVE STEPS:

1	2	3	4	5
<p><b>SEE IT</b> (a polarity).</p> <p>Recognize when “either/or” thinking is perpetuating a vicious cycle and move to “and” thinking. We have a polarity to leverage, not a problem to solve. Four questions help analyze this:</p> <ul style="list-style-type: none"> <li>• Is it ongoing, like breathing?</li> <li>• Are the alternatives interdependent, like inhaling and exhaling?</li> <li>• Over time, are both poles or solutions needed?</li> <li>• Finally, if we focus on only one upside, will we eventually undermine our mutual goal?</li> </ul>	<p><b>MAP IT.</b></p> <p>Take time to map the values and fears of each pole, identify a mutual goal, such as effective teachers, and acknowledge a deeper fear that has kept us rooted in our own position.</p>	<p><b>ASSESS IT.</b></p> <p>Stakeholders can measure or think through where an individual, team, or organization is on a particular polarity. Which pole is being honored more? Is the polarity in a virtuous or vicious cycle?</p>	<p><b>LEARNING.</b></p> <p>Consider our current circumstances, what they tell us about present and past actions, and how we might move forward, asking questions such as: How well are we handling this polarity? How might we improve?</p>	<p><b>LEVERAGING.</b></p> <p>Channel the energy being wasted on either/or thinking into identifying early warning signs that a polarity is getting out of balance and action steps that can harness the essential truths of both sides.</p>

you’d cover the entire curriculum.

Like any profession or talent, mastering teaching takes thousands of hours of deliberate practice (Ericsson, Prietula, & Cokely, 2007). Here, “deliberate” means having a coach or mentor to provide feedback on key skills and strategies for practicing to develop them.

If this is true — that mastering the practices of great teaching takes years — then how can we rate teachers ineffective as they first enter a classroom or even when master teachers are developing new skills? Rating systems need to consider this very real trajectory of growth.

Yet many of the evaluation systems being adopted across the country (and in other countries) are ranking teachers from highly effective to ineffective and, in some cases, using the rankings to begin termination. How did this happen? Because the difficulties being experienced in evaluating teachers were viewed as a problem to solve instead of a system of interdependent values — a polarity.

### WHAT ARE POLARITIES?

Polarities are paradoxes, or tensions, or both/and rather than either/or thinking. Measurement for teacher evaluation *and* measurement for supporting teacher growth are two distinct value sets that together form an interdepen-

dent pair where each set holds a portion of the truth.

One value set by itself is incomplete without the other. Barry Johnson coined the term “polarity” as he developed organizational tools for working with these ongoing dilemmas. “Polarities are interdependent pairs that can support each other in pursuit of a common purpose. They can also undermine each other if seen as an either/or problem to solve. Polarities at their essence are unavoidable, unsolvable, unstoppable, and indestructible. Most importantly, they can be leveraged for a greater good” (Johnson, 2012, p. 4).

Any time you treat a polarity as if it were a problem to solve, you get the downside of each pole — exactly as is happening right now in many places with the new teacher evaluation models.

Threats of teacher strikes over evaluation systems, educator-driven cheating on standardized tests, a decrease in funds available for coaching, and a significant increase in teachers planning to leave the profession indicate that we’re experiencing a vicious, not virtuous, cycle. A few years ago, one could have said we were in a vicious cycle because of the overfocus on supporting teachers.

Leveraging the wisdom of each pole could move toward the goal that the sides have in common: effective teachers in every classroom. Stakeholders need to recognize the valuable

contributions of the other position. Let's look at what might happen during a gathering of minds on this issue.

### SEEING A POLARITY

To create this imaginary meeting of minds, I reviewed extensively the research, blogs, position papers, and websites of people and organizations on both sides of this issue, including the Bill & Melinda Gates Foundation, Learning Forward, researchers at Harvard and Stanford, teacher unions and politicians, and many other sources.

In such a meeting, we would first demonstrate that teacher evaluation involves a polarity. A simple analogy — inhaling and exhaling — illustrates key points. Try it. Take a deep breath, hold it for as long as you can, and then breathe out. Then ask yourself: Which is better, inhaling or exhaling?

Whenever I have groups do this, someone always says, “Exhaling is better.” Really? You can't exhale without inhaling. And, if you don't cycle through both processes, your body will shut down. That's the nature of a polarity.

Just as when you hold your breath, exhaling is seen as a solution, so years of an overfocus by the teaching profession on supporting teachers resulted in measuring teacher effectiveness being seen as a solution to problems within our education system. Seeing a polarity involves considering a few key questions:

- **Is the dilemma ongoing?** Are the poles interdependent? If we believe that teaching expertise develops over time — and can always be deepened — then evaluating where we are and planning for growth is an ongoing cycle.
- **Will overfocus on either pole undermine our purpose of great teachers in every classroom?** Yes, the downside of supporting teachers became a system where nearly all were rated highly effective; removing those who weren't was far too difficult. However, we are already seeing the downside of the new emphasis on teacher evaluation with a major increase in the percentage of teachers who plan to leave the profession soon (MetLife, 2012).

Seeing a polarity is the first of five steps in a process called the Polarity Approach to Continuity and Transformation (PACT). The PACT process is designed to help people with opposing views listen to and learn from each other, recognize each other's values and fears, understand the processes and incidents or policies that brought them to the current state, and determine what mutually agreeable action steps will lead them together toward a mutual purpose. The five steps are outlined in the table on p. 25.

### MAPPING VALUES AND FEARS

Once we recognize that we're working with a polarity rather than a solvable problem, the next step is mapping — hearing and understanding the values and fears of each side.

Picture dividing the room into four quadrants, with each section representing the upside or downside of a pole, and a flip

chart easel in each quadrant. Individuals walk to each quadrant, reading and adding items to each of the charts.

Ideally, each stakeholder spends time articulating the values held by each pole (the upside) as well as the fears. The table on p. 27 summarizes the widely documented values and fears of each pole.

Can you see how the negative effects of overfocus on the left pole (lower left quadrant in the table) led to the upper right quadrant being seen as a solution? And how we're already seeing the downside of the right pole because the left pole is being ignored?

The pendulum swings will continue without honest conversations about values and fears. In fact, research into how we form our positions and opinions reveals the impact of confirmation bias — the tendency to only pay attention to information that reinforces the position we already hold. The only truly effective method for overcoming these biases is to enter into deep dialogue with those who believe differently (Haidt, 2012). This mapping process provides such an opportunity.

However, the real power of polarity thinking comes from careful consideration of where the system is right now, how it got there, and what actions can help us get the upside rather than the downside of each pole.

### ASSESSING WHERE WE ARE

The next step is assessing, formally or informally, whether we're seeing the upside of each pole. Within each school, district, or state, difficulties and solutions will be slightly different. We can informally assess where we are by considering which quadrant best describes the current energy flow in the system. Or we can use a formal assessment, using results to form the right action steps and put energy into the right practices to leverage the polarity.

Here's an example. A large school district, well into its first year of using its new teacher evaluation system, agreed to administer such a survey to instructional coaches, teacher evaluators, and curriculum coordinators.

The survey process developed by Polarity Partnerships gives an overall rating, a rating for how well the values and fears of each pole are being addressed, and ratings on individual questions. One can also compare different demographic groups.

We knew immediately that interest and concerns were high, since over 60% of those who were sent the survey link not only responded within 48 hours but also wrote lengthy answers to the open-ended questions and comment on the survey items.

The survey included 12 questions, evenly divided to gather information on how well the values and fears of each pole were being addressed. Respondents were asked to rate how often they see and experience items such as the following, with their responses ranging from “always” to “almost never”:

- Our systems have appropriate pathways for removing ineffective teachers.



## VALUES AND FEARS IN THE DEBATE OVER CREATING EFFECTIVE TEACHERS

<p><b>+</b> <b>Positive results of focusing on teacher support systems</b></p> <ul style="list-style-type: none"> <li>• Mastering the complex domain of teaching takes four to six years — and there are always new methods, skills, and knowledge to acquire.</li> <li>• An apprenticeship model, where teachers receive meaningful feedback and differentiated professional development, and an emphasis on career-long professional development, where every educator receives feedback and support to continue growing, would ensure teacher excellence.</li> <li>• This emphasis encourages the collaborative atmosphere that leads to student achievement.</li> </ul>		<p><b>+</b> <b>Positive results of focusing on teacher accountability</b></p> <ul style="list-style-type: none"> <li>• Other professions such as law and medicine have clear professional standards and hold members accountable.</li> <li>• In teaching, not only are standards nonexistent, but also 99.5% of teachers are rated effective. That's not credible in any profession.</li> <li>• A reliable measurement system will let us identify great teachers, reward them, and leverage what they know to help other teachers.</li> <li>• Further, a fair, legally defensible system will give school leaders more control over who is in the classroom.</li> </ul>
<p><b>-</b> <b>Negative results of overfocus on support to the neglect of accountability</b></p>		<p><b>-</b> <b>Negative results of overfocus on accountability to the neglect of support</b></p>
<ul style="list-style-type: none"> <li>• Current systems rank nearly all teachers as effective — and even teachers agree that it's almost impossible to remove ineffective colleagues.</li> <li>• Without professional standards, where is the incentive for ongoing growth?</li> <li>• Why aren't teachers held accountable for developing the practices proven to increase student achievement?</li> <li>• The tenure system takes away any incentive to improve, and the result is ineffective teaching.</li> </ul>		<ul style="list-style-type: none"> <li>• What can be measured is not always what is important.</li> <li>• The checklists being used to evaluate teachers cause a decrease in teacher creativity, devalue the professional wisdom developed through experience, and result in more teaching to the tests.</li> <li>• We're focused on removing teachers rather than on developing excellence. The result? Demoralization and erosion of trust among teachers, administrators, politicians, and the community.</li> </ul>

- Measures of student motivation enable us to identify teachers that need support.
- Concerns over accountability testing result in teachers teaching to the test.
- Resources and requirements for teacher professional development are unclear.

Given the newness of the evaluation system, it was no surprise to see an overall score indicating that work is needed to leverage the evaluation and support sides of this polarity.

Analyzing how different stakeholder groups answered questions pointed to specific difficulties. For example, whereas the evaluators said, “Our method for identifying which teachers need developing is seldom ineffective,” coaches gave a rating of “often” to the same item.

Further, coaches indicated that concerns over accountability testing were causing teaching to the test, but evaluators rated this as “sometimes.” In contrast, both groups felt that the new professional development options were motivating teachers to improve practice.

### THE LAST STEPS: LEARNING AND LEVERAGING

The assessing step provides clear information about whether the wisdom of both poles is being leveraged. All the energy being invested in resisting or fighting can instead be directed toward finding action steps that promise to gain the upside of both poles.

Some teacher evaluation models around the country already include positive ways to leverage the needs of both poles, including:

- Building on how high-performing countries such as Finland and Singapore have professionalized the teaching profession;
- Using research on motivation, which comes not from rewards and punishment but from autonomy, mastering skills or knowledge, and a sense of purpose (Pink, 2009);
- Establishing clear markers for professional growth as well as a response to intervention model for helping teachers develop expertise; and
- Ensuring that models account for varying levels of students with special needs or other considerations that affect teacher

workload and impact.

Besides these action steps, we can note action steps that warn we aren't leveraging this polarity very well — signs that manifest earlier than teacher strikes.

### MOVING TOWARD AGREEMENT

There are many similar polarities in education, where over-focus on one side eventually brings on a policy swing: Think of the cycles of methods for reading instruction, emphasizing key knowledge or key practices within disciplines, or even how leadership is distributed.

Darling-Hammond (2010) points out that not only do these ongoing battles slow progress on student learning, but “the students most harmed are the most vulnerable students in urban and poor rural schools, where the political currents are strongest and changes of course most frequent” (p. 15).

While the process takes time, the results can bring agreement where polarization existed, pinpoint the best allocation of resources, re-energize collaboration around mutual goals, and stop the policy swings that are inevitable when polarities are misdiagnosed as solvable problems.

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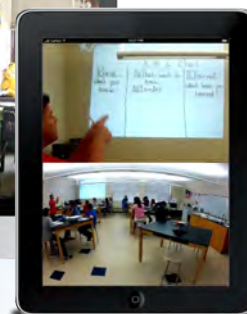
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# TURN ON THE LIGHT



## OBSERVATION TOOL CONNECTS TEACHER PRACTICE WITH STUDENT LEARNING

By Lori Renfro

**T**iffany Baldwin, 1st-grade teacher in the Alhambra Elementary School District in Phoenix, Arizona, stood in front of her class ready to begin a language arts lesson that would assist her students in understanding the word “adventure” by comparing and contrasting characters within a story.

She felt fully prepared. She had identified a possible misconception the students might have about the word, and she had a backup plan in case the lesson didn’t go as

anticipated.

As the lesson progressed, Baldwin realized that most of the class was struggling to understand the concept, and she immediately implemented her backup plan. She repeated the definition, showed additional examples, asked her students to think about a ride they had been on and how it made them feel, and asked specific questions to guide their thinking.

As the lesson concluded, they had a new understanding of the word “adventure.” Her backup plan had worked.

Baldwin knew how to plan for possible student misconceptions because of her district’s implementation of a new growth-oriented teacher observation tool. The tool





Photo by JOHN LUTZ

Studying the Learning Observation Instrument in 2011 were, from left, Veronica Vasque and Brenda Catlett from the Tolleson Elementary School District in Tolleson, Arizona.

helps communicate the message: *“This is what we believe is effective instructional practice, and we will support you in developing these competencies.”*

The Alhambra district, along with 11 other districts in Maricopa County, have forged an alliance to implement a performance-based evaluation system that supports teachers in attaining, maintaining, and enhancing core competencies aligned to a common vision of instructional improvement.

At the heart of the system is the Learning Observation Instrument, co-developed by Maricopa County Education Service Agency and six Maricopa County school districts as part of the Rewarding Excellence in Instruction and Leadership initiative funded by a U.S. Department of Education Teacher Incentive Fund grant.

Teachers in these school districts participate in four to five observation cycles over the course of a school year and engage in professional learning focused on the Learning Observation Instrument. After four years, the districts have surpassed state requirements for teacher evaluation processes and procedures in order to reduce the gap between professional learning goals and student outcomes.

## LAYING THE FOUNDATION

Beginning in fall 2010, the districts worked together to establish a first draft of the Learning Observation Instrument. Two big ideas guided the work: The instrument had to provide a picture of effective teaching that aligned with Arizona’s College and Career Ready Standards, and it had to effectively measure educator and student performance in order to support teacher professional learning.

What instructional practices would the observation tool include? The developers examined existing district instruments, reviewed other instruments and resources from the field, and collected input on effective instructional practices from teachers and principals.

InTASC’s Model Core Teaching Standards (Council of Chief State School Officers, 2011) served as standards outlining what effective teachers should know and be able to do. Guided by these standards, the group created an observation tool that includes 21 elements organized in five rubrics (content, formative assessment, instructional strategies, learner engagement, and learning community), with an optional professional responsibilities rubric.

In addition, these elements contain descriptors aligned to six performance levels to show increasing levels of proficiency.

The observation tool’s dual role — as a tool to guide the teacher observation process and as an instructional framework to support day-to-day classroom instruction and student learning — has an added benefit. As teachers learned the skills articulated in the instrument, their

**The tool helps communicate the message: *“This is what we believe is effective instructional practice, and we will support you in developing these competencies.”***

instructional autopilot disengaged, turning the planning process into job-embedded professional learning.

The observation tool pushed teachers to a new level, requiring them to understand and articulate the lesson content and select formative assessments that supported monitoring student progress.

Feedback is an essential part of the process. At the end of each observation cycle, the evaluator identifies specific elements teachers can focus on in order to move to higher proficiency levels. At least twice a year, teachers participate in observation cycles with an external peer evaluator who provides content-specific feedback.

Evaluators — including central office staff, building-level administrators, and peer evaluators — participated in 60 hours of professional learning, including 30 hours in the field, to prepare for their role. Teachers also engaged in professional learning before beginning the process and received ongoing support at school.

## IMPLEMENTATION

In 2011-12, the first year of implementation, partner districts increased observation cycles, with most teachers going from one observation to participating in two to three observation cycles over the course of the year.

In 2012-13, teachers participated in four to five observation cycles per year, with peer evaluators conducting two to three of those cycles.

Maricopa County Education Service Agency staff supported implementation by creating a lesson planning framework, an objective writing template, and professional learning modules aligned to elements from the observation tool that could be used in the field. These include scripts, slide presentations, workbooks, and videotaped classroom teaching episodes.

Peer evaluators and master educators also conducted school-level and grade-level information sessions and workshops based on the needs of individual educator groups. Building-level administrators and peer evaluators received ongoing support in observing and conferencing with teachers.

Throughout implementation, building-level administrators, instructional coaches, and teachers collaborated to understand the observation tool elements in individual, small-group, and whole-group settings.

In many schools, staff engaged in professional learning focused on specific elements. For example, Isaac School District

principal Kendra Moreno and her staff used data from instructional rounds to identify teacher-to-student interaction as their instructional focus for the year and ensured teacher professional learning focused on how to elicit student participation, ensure mandatory participation, and ask questions that require covert thinking and extended responses.

Teachers also worked individually and together in grade-level teams to grapple with observation tool elements. Tiffany Baldwin worked early during implementation to make sense of the student-to-student interaction element: “When it came to the discussion or conversation between my students, the Learning Observation Instrument encouraged me to find ways for my students to interact effectively with one another,” she says. “I incorporated activities that held each student accountable for their individual role in their work. I also organized partner roles to be very specific to each student, so that my proficient students could accomplish a more difficult task as opposed to my developing students.”

Baldwin realized she could pay specific attention to subgroups — not just to identify them, but also to interact with them effectively. She increased the time she spent on guiding questions, vocabulary, sentence stems, and how certain words or phrases might change based on the individual level of students.

Grade-level and content-area teams also worked together to discuss the observation tool elements and incorporate them into practice. Nadaburg Unified School District teacher Holli Taylor says that her 1st-grade team worked on how to include more cross-curricular content into daily lessons. They also delved into the instructional approach element in order to make improvements to their lesson delivery.

In the Tolleson Elementary School District, a 6th-grade team used the observation tool to look differently at data, examining performance relative to subgroups and individual students and possible misconceptions of students.

In the Isaac Elementary School District, Pueblo Del Sol’s 1st-grade team used the observation tool to break down content into subobjectives and plan higher-order thinking questions. In Alhambra, the district’s physical education teachers, concerned that the observation tool was not aligned to their instruction, engaged in content-specific professional learning to understand how the instrument’s elements could measure the effectiveness of their instruction.

Observation cycles, coaching sessions, and professional learning with peer evaluators were essential parts of implementation. April Castillo, field specialist for Nadaburg Unified School District and Tolleson Elementary School District, witnessed the impact of teachers and peer evaluators working together to become fluent with grade-level content standards and implement new classroom techniques. One example: In Nadaburg, a peer evaluator worked with a teacher to implement a system that would help students gauge their interactions with each other in order to increase expectations and help students realize their individual roles in collaborating with each other.

## ADDITIONAL RESOURCES

### Learning Observation

**Instrument:** <http://mcesa.schoolwires.net/site/Default.aspx?PageID=316>.

### The New Teacher Project. (2011).

*Rating a teacher observation tool: Five ways to ensure classroom observations are focused and rigorous.* New York, NY: Author.

Theresa Hullihan, a peer evaluator specializing in music instruction, works with teachers who have participated in little, if any, professional learning differentiated for their content area. In spring 2014, a post-conference session resulted in a light bulb moment for a music teacher when she realized she had assumed that a critical subobjective was taught in the general education class. Because of this, students weren't making progress on the lesson objective, and many had even moved backwards. At the post-conference, the connection between student progress data and critical subobjectives that needed to be part of the lesson became clear.

Since implementing the observation tool, teacher practice has changed. Peer evaluator Julie Waters says, "Some veteran teachers were used to a 'teach the unit, give the test, and move on' kind of philosophy. Now teachers are preassessing students and doing informal assessments along the way."

District field specialist Amanda Jelleson says the preconference process has had an impact on teacher planning. "Teachers are considering many more factors now when planning a lesson," she says. They consider data such as preassessments, literacy levels, student work, standards, and observational artifacts.

Building-level administrators have used what they learned to better support teacher planning. Isaac School District principal Kendra Moreno found she was having difficulty articulating the meaning of an element of the instrument to teachers. "It wasn't until I witnessed a teacher explain how her student achievement data influenced her lesson and assessment selection that I realized how to prompt teachers to reflect on this element," she said.

## CHALLENGES

Implementing the Learning Observation Instrument hasn't always been easy. Some teachers questioned whether the observation tool applied to their assignments. Teachers voiced concerns about the number of observation cycles, knowledge of evaluators, inclusion of peer evaluation, and the establishment of inter-rater agreement, and these became ongoing opportunities for dialogue and strategic support.

Many teachers struggled with receiving specific feedback for the first time in their teaching careers, and many administrators wondered if the instrument would be able to be successfully integrated into daily practice. Implementation also competed with other district initiatives, including the rollout of Arizona's College and Career Ready Standards.

All of these challenges have been or are in the process of being addressed. Superintendents, central office staff, and building-level administrators have joined together as part of a large-scale learning community to attend cross-district meetings and professional learning in order to support implementation. They have also worked to streamline initiatives and make connections for teachers, leaders, and governing board members.

Peer evaluators, who have conducted more than 4,700 ob-

servations and provided content-specific feedback, have established relationships with teachers and principals. Building-level administrators understand that the observation tool has to become part of teachers' daily experience. Moreno explains, "To assist the teachers in internalizing the instrument, we planned professional development, informal classroom walk-throughs, and a lesson plan template all designed to encourage daily implementation of the rubrics and elements."

## NEXT STEPS

Maricopa County Education Service Agency is working with districts to identify and develop resources so that all educators have access to just-in-time professional learning that fits their schedules. This includes videos of classroom instruction that allow educators to see footage of teachers exhibiting the instructional practices outlined in the observation tool.

Educators can also access online modules on the Maricopa County Education Service Agency website. Beginning this year, all teachers have developed educator goals based on their evaluation results, which will take individualized professional learning to the next level.

## FOCUS ON STUDENT LEARNING

Learning Forward's Standards for Professional Learning state that the "primary goals for professional learning are changes in educator practice and increases in student achievement" (Learning Forward, 2011). Implementing a performance-based evaluation system meets these goals using strategic design as a professional learning process.

The essence of this is best articulated in the Learning Designs standard, which says that "learning designs that engage adult learners in applying the processes they are expected to use facilitate the learning of these behaviors by making them more explicit" (Learning Forward, 2011).

The evaluation process includes components that help teachers develop instructional practices to better meet student learning needs — including those students who are above grade level.

Tracey Lopeman, principal of Alhambra Elementary School District, noticed that when teachers were striving to create assessments at the correct level of difficulty, they were compelled to identify and account for all existing levels of proficiency. "More than ever, teachers are finding avenues to increase complexity and heighten critical thinking for all students because of this emphasis."

## IMPACT ON STUDENT LEARNING

The instrument's post-conference elements, student progress and analysis of instruction, have contributed to student learning.

In the past, observations focused heavily on teachers rather than on student progress. Now, for a teacher to score at the proficient level on student progress, the post-conference needs to include evidence that 95% or more of students demonstrated

progress on the lesson objective.

To get to the highest level, 95% or more of students need to meet the lesson objective. For analysis of instruction, teachers have to identify strengths and weaknesses of the observed lesson, based on analysis of student work. Teachers come to the post-conference prepared to identify effective steps for increasing student learning for the next instructional episode, and, to get to the highest level, they have to speak at the individual learner level.

By making explicit the connection between teacher actions and student learning, evaluators and teachers are beginning to see individual, group, and classroom-level growth. Lupita Hightower, superintendent of the Tolleson Elementary School District, says, “When the teachers implement the elements from the Learning Observation Instrument, they are seeing immediate impact on student learning.”

Student achievement data tell the story as well. At the beginning of the program, large numbers of students were not meeting Arizona’s state standards. Since then, students have made steady progress. In 2012-13, participating districts met all of the established student achievement targets that are reported to the U.S. Department of Education as part of the Teacher

Incentive Fund grant.

This intentional focus on student academic progress advocates for professional learning that leads to increased student learning, which directly aligns to Learning Forward’s Outcomes standard. Jessica Karolevitz, a 6th-grade teacher in the Tolleson Elementary School District, says, “It was a light bulb moment when I planned for a specific student and it helped my Learning Observation Instrument score — and I saw the difference in my student’s success.”

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# INSPIRE LEARNING, NOT DREAD

CREATE A FEEDBACK CULTURE THAT LEADS TO IMPROVED PRACTICE

By James L. Roussin and Diane P. Zimmerman

**P**olicymakers have turned to teacher evaluation as one way to ensure accountability for school reform. In most evaluation systems, the emphasis focuses on the external: test scores, observations of classroom practices, rubric-based assessments, student feedback, evaluation, and student work.

While these activities have a place in professional development, they distract from the most important variable of all: the teacher’s mindset about continued growth and learning. How professionals receive and apply feedback is the cornerstone in any system for improving teacher performance. Feedback is most often given during teacher evaluations, after classroom observations, after walk-throughs, during peer reviews, and sometimes within the context of coaching. However, this leaves out the teacher’s cognitive capital. Cognitive capital defines the inner resources of a

**REFLECTION TOOL: CALIBRATING FEEDBACK**

The best way to know when feedback has been accepted and will likely shape practice is to ask for feedback about the feedback. By doing so, the giver of feedback capitalizes on teacher thinking and seeks agreement on next steps. This guide is based on Stone and Heen’s (2014) work on triggers that distort feedback. These questions represent a small portion of what could be asked, so use them to get started and then decide on your own questions.

TRIGGERS	FEEDBACK PROVIDER’S QUESTIONS	RECEIVER’S REFLECTIONS
<b>TRUTH TRIGGERS</b> Are we honest with each other?	<ul style="list-style-type: none"> <li>In what parts of our conversation did you feel most understood?</li> <li>What data might we collect to help us with your next steps?</li> <li>Did you find yourself holding back on any of your answers?</li> <li>Did you disagree with anything I said or feel that my feedback did not match your perceptions?</li> </ul>	<ul style="list-style-type: none"> <li>Did I speak up from a place of truth about how I perceived the feedback?</li> <li>If I held back information or was disingenuous, what do I perceive is triggering the response?</li> <li>What might happen that would make me more willing to say the truth?</li> <li>What data could we collect to show a truer viewpoint?</li> </ul>
<b>RELATIONSHIP TRIGGERS</b> Do we value the time spent in relationship?	<ul style="list-style-type: none"> <li>How has this conversation been different from other conversations we have at work?</li> <li>How has this conversation helped us come to know each other better?</li> <li>What parts of this conversation did you most value?</li> <li>Did you feel that I had your best interest in mind during the conversation?</li> </ul>	<ul style="list-style-type: none"> <li>Did I in any way feel devalued by the person giving me the feedback?</li> <li>Was my viewpoint solicited and listened to?</li> <li>Did I feel talked down to?</li> <li>How would I like this conversation to be different in the future?</li> </ul>
<b>IDENTITY TRIGGERS</b> Did this conversation engender positive beliefs about my own capabilities?	<ul style="list-style-type: none"> <li>How reflective was our conversation?</li> <li>Did we probe deeply or just stay on the surface?</li> <li>Did you at any time feel that you just wanted to get this over, and, if so, at what point in the conversation?</li> <li>At what moments in the conversation did you feel your thinking most valued?</li> <li>In what ways does this conversation increase your faith in your own capabilities?</li> </ul>	<ul style="list-style-type: none"> <li>Did this conversation feel safe enough that I was willing to reflect on my deeper self?</li> <li>Did I come to better understand or shift my ideas about the topic?</li> <li>In what ways did this conversation support my identity of being a learner?</li> <li>What does feedback reveal about how I see myself?</li> <li>Is this an organizational culture I trust?</li> </ul>

teacher, which frames thought and shapes reflection before, during, and after practice — key measures of quality instruction (Costa, Garmston, & Zimmerman, 2014). When leaders foster a school culture that supports emotional resourcefulness and transparency, cognitive capital increases and individuals are more able to receive, interpret, and apply feedback to improve professional practice.

This idea of incremental improvement through feedback — one teacher at a time, one classroom at a time — needs rethinking. Instead, reform efforts might be better served by promoting a culture that has learned how to receive and apply feedback in order to build collective wisdom.

How each person responds to feedback reveals much about the degree of trust and the value placed on continuous improvement and learning within a school culture. Lipton and Wellman (2012) emphasize that feedback is just the beginning of a conversation that explores and improves practice. When leaders are skillful, the culture begins to value and engage in data-driven, inquiry-based conversations between colleagues about improving practice.

In our work in schools, we have found that school cultures that practice the art of applying feedback tend to build robust and thoughtful models of instruction. These types of cultures focus on mastery, not just performance, and promote a growth mindset, which encourages innovation, creativity, experimentation, and learning from failure.

In contrast, feedback that focuses only on external performance reinforces a fixed mindset. In this context, feedback that shapes school culture comes from a place of judgment: “Do it the right way” or “don’t make mistakes.” More deeply embedded is the message: “Someone else knows better.” This approach can often activate for sensitive individuals an anxiety about not being good enough and, most damaging of all, reduces

teacher efficacy.

Before systems can build a culture that embraces feedback from a growth mindset, leaders first have to understand the barriers that inhibit the receipt of suggested improvements from an external observer. Next, leaders need to identify the types of relationships that foster positive interpretations of comments so feedback is accepted as a way of improving professional practice.

A thoughtful evaluator will think about how to advise, what to focus on, and what to ignore. He or she will wonder how to provide data to a teacher whose lesson aligns perfectly with the standards, yet lacks positive engagement with students. That same observer might also ask: How will this person receive the feedback? Will they listen and use my suggestions constructively? More importantly, a thoughtful leader will ask: How will I know if the feedback was received, accepted, and applied

to improve practices?

To ensure that this happens, an evaluator must find opportunities to engage with the teacher’s beliefs and values and expand the conversation to focus on the teacher’s thinking and perceptions.

To foster positive relationships that increase the possibility that the feedback will be accepted and acted upon, evaluators need to understand the obstacles to receiving feedback and learn ways to overcome them.

Obstacles to receiving feedback include: basing the feedback on a thin slice of performance; an imbalance of power between teacher and evaluator; and the teacher’s mindset about receiving feedback.

### THIN SLICE OF PERFORMANCE

One obstacle to receiving feedback is that it is based on a thin slice of performance, which might be perceived as devaluing the complexity of teaching and learning (Myung & Martinez, 2013).

The teacher will always hold a larger and richer context than the observing principal. When feedback is delivered from an occasional, momentary observation, it is often not received as a true representation of that teacher’s abilities or talents. When this “thin slice” is not perceived as significant to the teacher, the feedback will be dismissed.

To overcome this perception, the evaluator can engage in conversations with the teacher that build in choice — in this case, before the observation. This approach establishes a norm that allows the teacher to choose the lesson and the desired feedback.

Setting a value on teacher choice communicates that feedback needs to be about important teaching moments, not just random visits framed by an observer. Allowing choice signals to the teacher: “I want to learn about your teaching. What you think is important. What are the types of feedback that will most support you in a growth mindset?” In our experience with coaching, this kind of collaborative learning framework encourages positive relationships and acknowledges a growth mindset, which increases one’s cognitive capital.

Stone and Heen (2014) remind us that the descriptions of feedback are labels, subject to interpretation through each person’s perceptions. Even when the feedback meets the norm of being specific, measurable, and constructive, the receiver must be given quality time to interpret, make meaning from, and adapt the feedback. Reflecting aloud about the feedback, then projecting possible applications, builds commitment and increases the odds that the teacher will use the feedback to improve instruction.

To further shape a school culture that addresses external demands such as Common Core State Standards and teacher evaluations, the leader must work with the school community to clearly define shared goals for observation and feedback that

**How each person responds to feedback reveals much about the degree of trust and the value placed on continuous improvement and learning within a school culture.**



focus on mastery and a deeper understanding of the craft of teaching, not one-time performances.

By allowing opportunities for teachers to insert personal learning goals and reflections, these types of conversations shift from episodic to planned, purposeful, and ongoing, creating a job-embedded, collaborative model.

### IMBALANCE OF POWER

Another obstacle in giving feedback is the imbalance of power in a superior/subordinate relationship, which can cause the teacher to feel a sense of disempowerment and a threat to his or her professional image.

In most schools, the principal controls how the evaluation process unfolds as well as the end result. When professionals feel powerless, it is not uncommon to experience increased anxiety, vulnerability, and fear, creating an emotional, not a cognitive, reaction. Negative emotional reactions trigger noncognitive responses that show up as defensiveness, helplessness, or stonewalling, which signal that the feedback will be discounted.

Savvy leaders pay attention to how feedback is received, noting defensive behaviors, and adjusting the conversation to elicit more of the teacher's viewpoint, open up options, and create a more equal playing field.

To balance the power administrators have in observations and evaluation, it is helpful to develop a protocol that informs teachers and administrators how the feedback conversation will unfold. Leaders should strive for agreement within the school on the purpose of feedback.

When using mastery, not performance, as a guide, the end result is on learning, building cognitive capital, and reciprocity. The whole community, including the principal, commits to building collective intelligence that values feedback as an important aspect of human growth and learning.

By adopting protocols or procedures, the community names the shared agreements. When all parties commit to the collaborative conversation, ownership for receiving feedback, making meaning of it, and applying it to instruction increases.

The trick to making feedback useful is to understand that it is not the observer's story, but rather the narrative that the teachers create from the feedback to plan for future actionable results. In our experience, these narratives must surface challenges, identify insights, and provide plans to apply the new learning in a future lesson.

This is best done in collaborative, trusting environments in which everyone becomes an equal learning partner. According to Stone and Heen (2014), "How we receive feedback is actually more important than how we give feedback. If your goal is to empty the sink by sending the water down the drain, which is more important: How you run the faucet or whether the drain is open? You can be the most skillful feedback giver on the planet, but at the end of the day, the receiver is in charge of what they let in, and how and whether they choose to change."

### MINDSETS ABOUT RECEIVING FEEDBACK

Stone and Heen (2014) also remind us that feedback is a lifetime habit developed in part by our nature (how sensitive we are) and by the models we observe. Each person learns to calibrate feedback as positive, negative, or neutral — and interpretations can vary widely.

Because feedback is a reflection on one's performance and professional image, it is not surprising how easily it can be rejected, especially if it is not coherent with an individual's perception of his or her identity.

What complicates feedback even more is the perception of trust. When teachers do not sense trust in the relationship, feedback will have little if any opportunity for changing professional behaviors. Cultures that lack trust are more likely to perceive feedback as negative and to react with protective responses adopting a psychological posture that is argumentative or passive-aggressive.

Wise leaders work to promote a culture that is both trusting and trustworthy by regularly seeking feedback about the level of trust in the organization. This process of seeking feedback about the level of trust models directly how feedback can be requested and applied to improve learning.

When the receiver of feedback perceives suggestions or advice as constructive, the individual takes an active role in seeking out observations that reveal potential blind spots, exposing hidden talents, and identifying areas to grow and learn. The goal of feedback is to promote a growth mindset that leads to mastery, increases cognitive capital, and enhances one's professional capacity.

Carol Dweck's (2006) research suggests a way to reframe one's mindset about feedback. Her investigation with students found that when feedback focused on specific efforts, rather than superficial attributes, students persisted and were more willing to take on challenging tasks.

Bandura (1997) would view this type of feedback as building teacher efficacy — the sense that "I can make a difference." When teachers come to a collective understanding that they make a difference in students' lives, they thrive in a culture of collective efficacy (Hoy, Sweetland, & Smith, 2002).

Finally, a growth mindset requires a view of learning that Kegan (1994) calls self-authorship. This is an individual's ability to reflect on her own beliefs and organize her thoughts and feelings so that she can describe how she made up her mind to act. When each person can articulate his or her own learning story, the culture begins to reshape itself into a networked in-

*Continued on p. 47*

**Savvy leaders pay attention to how feedback is received, noting defensive behaviors, and adjusting the conversation to elicit more of the teacher's viewpoint, open up options, and create a more equal playing field.**



# PARTNERS WITH A PURPOSE

**DISTRICT AND TEACHERS UNION CREATE AN EVALUATION SYSTEM  
THAT NURTURES PROFESSIONAL GROWTH**

By Kathleen Pham and Amanda Heinemann

**W**hat is — or should be — the purpose of a teacher evaluation system? To compare teachers? To inform the public? To help teachers improve?

Legislators might say that a teacher evaluation system's purpose is to remove bad teachers. Administrators might say that it is to assist them in matching teacher skills to specific groups of students. Parents might say that it is to provide information about a particular course. Teachers might say that it is to increase their effectiveness in the classroom.

As states and school districts experience the growing pains of changing their evaluation systems, determining the purpose of the teacher evaluation system is essential.

When we started our positions as peer reviewers in Miami-Dade County Public Schools, we decided to explore this idea. We found interesting research on the two purposes of teacher evaluation. "An evaluation system that fosters teacher learning will differ from one whose aim is to measure teacher competence," says Robert Marzano (2012).

This analytical statement provides the

foundation for our thinking about the role of peer reviewer. While some legislators and administrators might say that an evaluation system's purpose is to measure teacher competence, we disagree. To illustrate, we present Miami-Dade County Public Schools' Instructional Performance Evaluation and Growth System, which is an example of a teacher evaluation system that integrates professional learning.

#### HOW IT BEGAN

Miami-Dade's teacher evaluation system is the result of a joint effort between the district and the local teachers union. The two organizations have worked together over the last nine years to create, pilot, and implement the system.

The vision for teacher evaluation was to move from the former system, which included an extensive checklist, to a standards-based system that includes both student achievement and teacher reflection. That proactive thinking put the district, for better or for worse, into the forefront of the national movement toward using test scores to evaluate teachers.

Originally designed to uphold its main purpose of increasing teacher effectiveness, the new system also included student learning measures to satisfy those who wanted to use

#### ABOUT iHEAT

**T**he goal of Miami-Dade County Public Schools' Incentives for Highly Effective Administrators and Teachers (iHEAT) Initiative is to increase teacher and administrator effectiveness and, consequently, student achievement through incentives and professional learning. Key objectives are to:

- Improve the quality of the Instructional Performance Evaluation and Growth System (IPEGS) observation and feedback process to improve instructional performance and student outcomes;
- Recognize and reward highly effective teachers and school leaders;
- Provide relevant and timely job-embedded support and professional learning to teachers and administrators to improve their performance to the highly effective level; and
- Provide relevant and timely job-embedded support and professional learning for teachers performing below effective levels to improve their performance to effective levels and meet the performance requirement for reappointment set forth in Florida statute.

**Source:** Miami-Dade County Public Schools Professional Development & Evaluation, <http://prodev.dadeschools.net/iH13.asp>.



the system to evaluate teachers. The purpose was further complicated by legislative mandates, but as much as possible, both the school district and the union have worked to maintain the new teacher evaluation system as a tool whose primary purpose is to nurture professional growth.

### WHERE PROFESSIONAL LEARNING FITS IN

Professional learning comprises the core of Miami-Dade County Public Schools' Incentives for Highly Effective Administrators and Teachers (iHEAT) program, funded by a Teacher Incentive Fund grant.

The district's 26 peer reviewers work with teachers at nine schools to help align their practice with the educator performance standards in the teacher evaluation system. The overall goal is to improve student outcomes. Peer reviewers facilitate professional learning in five ways: individual job-embedded instructional coaching, professional learning communities with an instructional focus, lesson studies with focus on student thinking and learning, instructional strategies workshops, and official observations.

Two aspects of the iHEAT program distinguish it from other coaching models or peer assistance programs. The first is that the informal coaching is totally teacher-directed. The participating teacher decides on an area of focus for professional growth, and together the teacher and peer reviewer determine the type of collaboration and support that will occur. Other coaching models include required elements generated by the district or school. No such mandates exist in this program. The second distinctive aspect of the program is that all teachers in these schools — not just new teachers or those in need of assistance — are eligible to participate.

Once teachers elect to participate, they receive informal coaching and an official formal observation from a peer reviewer. The informal coaching takes many forms. With early career teachers, the focus is often on the basics, such as monitoring student learning or developing meaningful lesson plans. With more experienced teachers, the focus may be on incorporating appropriate technology or increasing student engagement. The informal coaching serves to help teachers elevate their practice and also helps teachers prepare for the official teacher evaluation observations.

### PREPARATION FOR THE iHEAT PROGRAM

At the school we serve, the iHEAT support team consisted of three peer review teachers, one each with certification in English, math, and science. The peer review teachers received extensive training in topics such as coaching, the teacher evaluation process, data analysis, facilitation skills, Common Core State Standards, district professional learning guidelines, adult learning principles, professional learning community practices, and protocol use.

Teachers were enticed into iHEAT participation with in-

centives for participating in professional learning and receiving highly effective ratings. When teachers opted in, they agreed to allow peer reviewers to conduct one additional formal observation beyond those required by the teacher evaluation system. The goal was to convince teachers to become more transparent in their practice.

After peer reviewers' initial conversations with the faculty and then with the 54 teachers who opted into the program, they divided the group into three teams of 18 teachers each. Participants engaged in written surveys, group meetings, goal-setting reflective writing, and one-on-one oral interviews to begin the coaching and support.

### PEER REVIEWER PERSPECTIVE

A primary form of professional learning throughout the year is the informal teacher-directed coaching cycle (i.e. preobservation conference, observation, and post-observation conference). When a teacher is ready to invite a peer reviewer into the classroom, the teacher and peer reviewer decide on a time for the observation, a specific focus, and a data collection process.

With each teacher, the peer reviewer collects and analyzes the data and creates a data display. The data display is used during the post-observation coaching conversation, where peer reviewer and teacher decide together on strategies and practices that may be added or modified as a result of the data.

Peer reviewers' coaching doesn't always take the form of a structured coaching cycle, yet the goal is still to improve teachers' professional practices. The work can also be less structured and more organic, timely, and relevant, with impromptu professional conversations at meetings, in the parking lot, and in the lunchroom. Whether structured or organic, peer reviewers' intent is to help teachers understand the standards by which they are evaluated. The teachers are then equipped to demonstrate their highest level of effectiveness during an official formal observation.

In addition to coaching, peer reviewers work with teachers to improve their practice through other professional learning experiences. Professional learning communities, lesson studies, instructional strategies, and workshops exploring the teacher evaluation standards are all part of the process. Each teacher engages in a thorough review of the teacher evaluation process to gain an understanding of what observers look for during a formal observation.

Reflecting on the peer review process this year, peer reviewers conducted formal observations after moving through several informal coaching cycles with each teacher. Peer observations went smoothly, in part because teachers understood clearly what was expected.

Peer reviewers documented evidence of the standards and then provided specific, timely feedback, helping teachers strengthen their practice. The teachers expressed appreciation for the time peer reviewers spent observing and providing feedback.

Because the principal will use peer reviewers' formal obser-



variations as official documentation during teachers' summative evaluations, the challenge was to objectively capture effective classroom teaching practices. Peer reviewers operated with the understanding that more knowledge and better skills would lead to a highly effective rating.

As peer reviewers, we also believe that skills are developed over time if teachers are given the opportunity to try out new strategies in the classroom. By the time the formal observations occurred, the teachers with whom we had worked throughout the year were comfortable having us in their classrooms. They were confident that they understood the standards and trusted us to gather objective evidence about their practice in relation to the standards.

## PARTICIPANT PERSPECTIVES

### Professional learning communities

**Professional learning communities** were a positive learning experience for participants, who cited the goal-oriented focus of the work, shared leadership, and equity in participation. The professional learning communities focused on the four observable standards in the evaluation system: knowledge of learners, lesson planning, instructional delivery and student engagement, and learning environment.

The following teacher comments demonstrate the depth of learning that took place over time.

- “I am more aware of student differences and target the lessons toward different abilities and learning styles.”
- “My students are taking more responsibility for their learning.”
- “I have learned that some students take longer so I have to be aware of different abilities and levels. I also incorporate [the teacher evaluation system] into my lesson planning.”
- “I implement more cooperative and team-building strategies, and I’ve learned what to do if students do not grasp an abstract concept. Now I use different strategies to reach students.”
- “I now know how to get students working together to do projects and drawings. I want to interest all students and address various learning styles.”
- “The smaller setting was especially helpful for updating my resources and techniques.”
- “I feel that the professional learning communities provided teachers an arena where they could discuss and evaluate the many issues that they face in the classroom.”
- “Working with contemporaries, I was able to see practices from different angles.”
- “I was able to refine practices, adapt, and learn how to use strategies properly to interest and engage more students from all levels.”
- “Now I know how to create a more project-based learning environment.”

### FOR MORE INFORMATION

- Learn more about Miami-Dade County Public Schools’ Instructional Performance Evaluation and Growth System (IPEGS) at <http://ipegs.dadeschools.net>.
- Learn more about Miami-Dade County Public Schools’ Incentives for Highly Effective Administrators and Teachers (iHEAT) program at <http://prodev.dadeschools.net/iH13.asp>.

### Lesson study

Another activity that contributed to teachers’ professional growth was **lesson study**. The following comments from participants indicate the depth of reflection and growth that can occur when teachers are provided the time and opportunity for collaboration.

- “I learned how to do a lesson plan and was able to see how a detailed structure can help the teacher cover the most important points according to the group that you are working with.”
- “I became more mindful of including ways students can reveal their thinking as well as delivering instruction and assessment to see if there is student growth.”
- “The lesson study was more directed toward instruction than systemwide professional development. We had the chance to directly interact, ask questions, and discuss with the instructor and fellow colleagues.”
- “In the discussion time was when we actually learned. As a result, my students are more engaged.”

### Informal coaching

The **informal coaching** cycles have also had a positive impact on the participants’ teaching practices:

- “Having an iHEAT peer reviewer is like having an ally.”
- “The feedback is important as I can use it to improve weak areas. Positive feedback is also good. It helps pinpoint things that I am doing well so I can do them a little more.”
- “By the time the formal observation rolled around, I had a sense of what I should be doing. I appreciated the objectivity and felt confident since I knew it was not going to be an ‘I’m going to get you’ experience.”
- “Since we had already been working together and had a trusting atmosphere, I had a good feeling about my colleague conducting the formal observation. I wanted to show what we had been learning. I knew [the teacher evaluation system], techniques, and my course content.”
- “The one-on-one meetings to look at data have been very

*Continued on p. 47*

# POLICY MEETS PRACTICE

DISTRICTS FEEL THE IMPACT OF STATE REGULATIONS

By Helen M. Hazi and Daisy Arredondo Rucinski

**S**tewart Thorson, principal of New Century Technology High School in Huntsville, Alabama, develops plans for his school's professional learning in an environment restricted by state regulations.

In Alabama's Title I and low socioeconomic status schools and through initiatives such as Blue Ribbon Schools and the State Department of Education's Plan 2020, individual, school-, and district-level professional learning plans are tied to school improvement goals and monitored and evaluated at each level — with online monitoring at the state department level.

The regulations require local committees, special coordinators, and state-approved providers, with on-site review of the professional learning's impact for Title I schools. Thorson sees these restrictions as "good — if a school is ready," especially for specific targeted professional learning initiatives. This includes project-based learning, which requires 100% buy-in of faculty and high levels of parent involvement. So, if a school has not done the prepa-



ration work with its stakeholders, it will not qualify for the funding.

A national network of online activities and assessment surveys are the source of professional learning for this particular initiative. However, Thorson points out that if a school is not ready for the specific initiative selected at the

state level, choices are limited because funds for other options are not provided and often not available from other sources unless the school can garner private funding.

EDUCATE Alabama, the newly adopted professional teacher evaluation system, views professional learning as the primary function of the evaluation process and requires that all teachers identify areas for improvement and develop goals for their own professional growth.

Thorson views this as limiting because principals must support teacher growth on teacher-identified goals, rather than assisting teachers with choosing improvement goals the district may want the teacher to work on. While Alabama allows districts to opt out of the EDUCATE Alabama evaluation process, Thorson doesn't know of any school district that has elected to do so.

"Opting out of EDUCATE Alabama is probably an option as long as your district has a process that includes all the same components as the state system," Thorson says.

### A NEW ACCOUNTABILITY

Thorson's experiences at New Century Technology High School illustrate the changes to professional learning — and how that intersects with teacher evaluation — since passage of the No Child Left Behind Act of 2001.

Before No Child Left Behind, specific types of professional learning were left to local discretion. Since then, the legislation introduced a new kind of accountability in states as well as a definition of high-quality professional learning.

In 2010, states were challenged to develop effective teachers and principals. In *A Blueprint for Reform* (U.S. Department of Education, 2010), federal policy linked the results of teacher evaluation to professional learning and told school districts to use funds "to foster and provide collaboration and development opportunities in schools and build instructional teams of teachers, leaders, and other school staff, including paraprofessionals, to support educators in improving their instructional practice through effective, ongoing, job-embedded, professional development that is targeted to student and school needs; ... Funds spent on professional development and class size reduction must be aligned with evidence of improvements in student learning" (p. 15).

At the state level, the National Governors Association advocated for changes in professional learning in a policy brief (Grossman & Hirsch, 2009) that acknowledged its many prob-

lems, including limited impact despite considerable resources. The policy brief called for changes that focused professional development on student learning.

### CHANGES IN STATE STATUTES

States began to intervene in local policy and practice as they modified teacher evaluation statutes. Some states' statutes required the presence of evaluation systems and their approval, receiving results and handling appeals, approving remediation plans, and conducting on-site reviews. Some also required training in evaluation systems (Hazi & Arredondo Rucinski, 2009).

As states changed professional learning, they have required more of practitioners in local school districts. According to an analysis of state professional development statutes (Arredondo Rucinski & Hazi, 2008; Hazi & Arredondo Rucinski, 2014), some states added standards to statute. Some adopted Learning Forward's Standards for Professional Learning (Learning Forward, 2011), while other states developed their own professional learning standards. However, most states haven't linked professional development to teacher evaluation through their statutes. Many states require school or district plans for professional learning. Some require state approval of their plans. Only a few states require professional learning to be tied to local school improvement efforts. However, a few other states only require professional learning plans in schools that are found to be low-performing.

Some states require teachers to create individual plans for their professional growth or certification renewal. Interestingly, some states require districts to evaluate the impact of their professional learning. Only a very few have a state plan for professional learning.

Other requirements that have begun to appear foreshadow the incremental creep of state control. These include:

- A local professional learning committee or council;
- A directory or list of approved providers for professional learning;
- Approval of professional funds;
- An on-site review of professional learning;
- A special office or coordinator for professional learning; and

**A look at trends across the U.S. identified strategies that district leaders can use — regardless of their state's current regulations — to improve professional learning.**



- Input of parents, community, and business into professional learning.

While most states don't link teacher evaluation to professional learning, some have done so in statute in various ways. These include:

- Professional learning required in individual improvement plans;
- Professional learning for those needing improvement;
- Evaluation tied to licensure renewal;
- 90-day action plan and dismissal; and
- Failure to participate in professional learning is neglect of duty.

These data show that states are trying to improve teacher quality by improving local professional learning through statute. Of course, this does not account for changes they have made through state regulations or through offering incentives. Professional learning is a big expenditure, and schools, state boards of education, and state departments of education are under scrutiny to make improvements. The question is whether changes to teacher evaluation will result in the hoped-for improvements to teacher quality.

These changes to state statutes appear to be the result of the first three of four recommendations from the National Governors Association:

- Gather and use student achievement data to assess the effectiveness of professional development;
- Use teacher evaluations and student learning data to create individualized development plans for teachers;
- Establish research-based state standards to create a vision for high-quality professional development; and
- Create an incentive-driven professional development initiative for teachers to acquire advanced skills (Grossman & Hirsch, 2009, p. 1).

### A DISTRICT'S EXPERIENCE

According to Kathryn Sprigg, director of assessment for the Highline School District in suburban Seattle, Washington, professional learning plans are required for individual teachers by the schools in her district and tied to school improvement plans, with impact evaluated and reported to districts.

These plans are required in Washington Administrative Code (the state's regulations), by special projects, and by specific financial incentives. Districts use local committees, state-approved providers, and special professional learning coordinators. Funds are approved at both district and state levels. Officials conduct a consolidated on-site review on a regular basis.

Sprigg says the regulations have "probably enhanced what is done locally because they have caused strategic plans to be more focused and have thus resulted in more specific training.

"In addition, the state provides personnel for training for some school improvement projects and for teacher evaluation

processes."

Washington's districts are required to select one of three teacher evaluation systems — Charlotte Danielson's Framework for Teaching, the Marzano Teacher Evaluation Model, or a process designed by the University of Washington's Center for Educational Leadership called the 5 Dimensions of Teaching & Learning.

In Washington, professional learning has become part of teacher evaluation because it is required by individual improvement plans and for those needing improvement. Professional learning is tied to licensure to the extent that professional learning credits are specified for advancement from provisional to professional certification and teacher tenure.

### WHAT SCHOOL DISTRICTS CAN DO

Looking collectively at these trends, we identified strategies district leaders can use — regardless of their state's current regulations — to improve professional learning.

- Follow best practice so that you are ready in case state or federal legislation is enacted.
- Become familiar with Learning Forward's Standards for Professional Learning and consider subscribing to them locally. You can follow their spirit without formally adopting them for your district.
- Always link your district and school professional learning to areas in need of improvement and each school's formal school improvement plan. As you provide assistance to school principals in their planning, ask questions that will help them best use limited resources.
- Evaluate the success of your professional learning offerings. This type of impact data, different from teacher opinions about impact, will position you to apply for grants, communicate district success, and position you to be a leader in your region or state.
- Leverage professional learning funds to those schools with the best plans and proposed use. Consider whether schools should apply for funding to the superintendent and whether funds should be awarded based on the best proposals. To build in continuity and long-range thinking, give priority to proposals that are student data-driven with sufficient follow-up, encourage teachers helping other teachers, and employ a team approach to multiyear efforts.
- Establish professional learning communities with teams of teachers in high-need grades and subjects.
- Provide a professional learning track for individual teachers whose evaluations indicate needs, and offer individualized, differentiated assistance. While schools and their teachers are in a high-stakes climate, be cautious with using the results of student testing as the sole measure of a teacher's ability, especially in situations where you have not carefully evaluated the alignment of tests, texts, and teaching. Be wary, too, of evaluation systems that prescribe a specific

way of teaching as the single best approach for all subjects, grades, and student populations.

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Inspire learning, not dread

*Continued from p. 39*

formation system that seeks feedback as a fundamental way of doing business. This requires that professionals understand that coming to know is a shared journey, not a fixed destination.

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Partners with a purpose

*Continued from p. 43*

helpful. We are able to analyze data that are specific to my class.”

- “The experience was not negative, but it provided corrective measures that I needed. You need a flexible, open mind to advance learning and teaching skills.”
- From a first-year teacher: “I came into teaching with these ideas about how I would be very lecture-based and students would keep these big notebooks. But I have learned a lot. I have kept the lecture format, but I have implemented strategies that make them more responsible for their own learning. And students have taken more of an interest in the class because they get the hands-on experience and they are learning for themselves instead of just having someone tell

them what to do.”

These examples show that a teacher evaluation system with improving teacher effectiveness as its purpose and professional learning as its core can be successful at nurturing professional growth and fostering increased student learning.

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# TOP 10 LEARNING NEEDS *for* TEACHER LEADERS

By Stephen P. Gordon, Jennifer Jacobs, and Rachel Solis

**O**ur rapidly changing world and the increasingly complex demands placed on schools because of that change has led to an increasing awareness that the school principal alone cannot provide all of the leadership necessary for school development.

More and more school districts are asking teachers to share leadership responsibilities with school administrators. At the same time, even teacher leaders who are outstanding classroom teachers and committed to assisting their colleagues and renewing their schools still need their own professional learning in order to reach their leadership potential.

Based on studies in which we have asked

teacher leaders about their professional learning needs (Gordon, 2011; Gordon, Jacobs, & Solis, 2013; Jacobs, Gordon, & Solis, 2013) and our own work with teacher leaders, we can make two general statements concerning how teacher leaders feel about their professional development as leaders:

- They greatly appreciate such professional learning, provided it is focused on what they perceive to be authentic needs; and
- They do not believe they receive enough of it.

We have identified 10 areas in which teacher leaders tell us they need professional learning. Most of these needs cannot be taught to teacher leaders in a single, short-term program. Rather, these needs are met through ongoing professional learning.





## 1 INTERPERSONAL SKILLS

Teacher leaders' primary professional learning need is ongoing development of interpersonal skills. Chief among these are listening skills — the ability to not only understand the needs and concerns of teachers they work with but also to develop empathy with those teachers.

Teacher leaders also look for professional learning in collaborative skills, which include the ability to bring together teachers of diverse backgrounds and ideas to engage in respectful dialogue and shared decision making. Collaborative skills, according to teacher leaders, also include the ability to recognize and nurture leadership in other teachers and give colleagues credit for their contributions.

## 2 ORGANIZING

Teacher leaders report that their single greatest problem is insufficient time to carry out all of their leadership responsibilities in addition to their teaching.

One way to address this problem is for administrators to assign teacher leaders a reasonable workload with clearly delineated leadership responsibilities and adequate released time to fulfill their leadership role. However, even in schools with such provisions in place, teacher leaders still report that they have difficulty with time.

Thus, time and work management become important aspects of professional learning for teacher leaders. Organizing skills include skills for organizing people, resources, programs, and activities.

## 3 KNOWLEDGE OF CURRICULUM AND INSTRUCTIONAL INNOVATIONS

Because teacher leaders often are responsible for introducing curriculum and instructional innovations to other teachers, it makes sense that teacher leaders perceive learning about these innovations as one of their professional learning needs.

Teacher leaders often need to explain and demonstrate innovations to teachers, as well as provide classroom assistance to teachers trying out innovations in their classrooms. The leader needs to develop expertise regarding the innovation early on in the adoption process.

Teacher leaders also need to understand how innovations can be integrated into the existing curriculum and instructional program, other school structures, and efforts to meet accountability standards.

## 4 MENTORING

In one national survey (Jacobs, Gordon, & Solis, 2013), more than 60% of teacher leaders were assigned to mentor beginning teachers as one of their responsibilities. Many other teacher leaders assist new teachers even if they are not assigned to the beginners as formal mentors.

It is no surprise, then, that teacher leaders cite the need for professional learning in mentoring knowledge and skills. Topics might include orientation of new teachers to the school and community, preparing the beginner for the first weeks of teaching, understanding typical problems experienced by beginners, and

ongoing mentoring.

In addition, teacher leaders could benefit from learning to mentor experienced but still developing teachers, which requires a different approach.

## 5 GROUP PROCESS

A good part of teacher leaders' work involves leading groups in instructional team meetings, professional learning communities, and curriculum development. Most teacher leaders we surveyed feel they possess inadequate group process skills and need professional learning on topics such as:

- The phases of group development and how to facilitate groups through those phases;
- Roles necessary for effective group process;
- Dealing with dysfunctional group members; and
- Addressing group conflict.

Planning for meetings, facilitating group decision making, group problem solving, and group self-assessment are other important areas to be addressed.

## 6 TECHNOLOGY

Teacher leaders report the need for learning in three different areas of technology:

- **Assisting teachers with using technology for classroom instruction.** This appears to be particularly challenging with older teachers who lack experience with technology.
- **Using technology to provide instructional assistance to teachers.** Such instructional assistance might mean using technology to collect or analyze classroom observation data for an individual teacher or using technology as part of professional learning for a group.
- **Using technology to manage, analyze, and share student performance data.**

If the technology is new to a teacher leader charged with introducing it to others, professional learning first needs to cover how to use the technology, then how to best acquaint colleagues with the technology.

## 7 FACILITATING CHANGE

Teacher leaders often are asked to lead change efforts, yet they tend to have very little professional learning on how to do so. To be successful change agents, teacher leaders need to understand:

- How to establish communication networks to facilitate change (Bain, 2007);
- How to promote organizational readiness for change (Glickman, Gordon, & Ross-Gordon, 2014);

- Individual stages of concern about the change and how to help teachers progress through those stages (Hall & Hord, 2006);
- How the change will affect other aspects of the school as a system; and
- How the change can be implemented in a way that contributes to the school's capacity for continuous development.

Stiegelbauer (2008) reminds us that each major school change "requires change in behaviors, skills, attitudes, and, frequently, ways that people work with one another. Each of these is a kind of innovation in itself and a reason that change is always complex" (p. 122).

It is no wonder, then, that teacher leaders tell us that if they are going to be asked to assume major roles in implementing school change, they need ongoing professional learning on how to facilitate change.

## 8 TRAINING AND COACHING

Teacher leaders quickly realize that engaging in professional learning with teachers is not the same as teaching children, and therefore they need better understanding of adult development and adult learning.

Many teacher leaders report feeling less comfortable presenting to a group of teachers than working with individuals and recognize the need to develop better skills for making oral presentations, conducting group demonstrations, and leading workshops.

To improve their work with individuals, teacher leaders say they most want to improve their coaching skills, which include classroom observation, data analysis, and conferencing. Teacher leaders tell us they are particularly interested in learning how to better use observation data and conferencing to help teachers come to their own conclusions about areas of teaching in which they need to improve.

## 9 LEADING REFLECTIVE INQUIRY

Despite strong evidence that reflective inquiry improves teaching and schools (Dana & Yendol-Hoppey, 2009; Gordon, 2008), most of the teacher leaders we have surveyed and interviewed do not report assisting individuals or groups in that process or possessing the capacity to do so.

Although teacher leaders regularly gather student achievement and classroom observation data, our research indicates that most teacher leaders do not assist colleagues in full-fledged action research, lesson study, teacher portfolio development, reflective writing, or other reflective inquiry formats.

Teacher leaders could benefit from professional learning in this area on several levels:

- Teacher leaders who do not feel comfortable with reflective inquiry need to develop their own skills in selecting a focus of inquiry, gathering data on the focus area, developing an action plan, implementing the plan, gathering assessment data, and reflecting on their actions during each stage of the inquiry process.
- Teacher leaders also need to develop knowledge about different reflective inquiry formats (action research, lesson study, and so on).
- Teacher leaders need to develop skills for facilitating other teachers' reflective inquiry and engaging in reflective dialogue with teachers before, during, and after reflective inquiry efforts.

## 10 ADDRESSING DIVERSITY

The single most disappointing result of our surveys and interviews of teacher leaders is that the majority do not feel competent to help other teachers to be culturally responsive to students of color and students with a first language other than English.

Professional learning for teacher leaders in this area needs to begin with helping them to become culturally responsive by learning about culture in general, other cultures, and the negative effects on students of culturally insensitive schools, curriculum, and teaching. Additionally, teacher leaders need to learn how to incorporate into their curriculum and teaching the assets that students of diverse cultures bring to school and how to collaborate with parents and the community in the education of diverse groups.

Next, teacher leaders need to learn strategies for helping other teachers to develop cultural responsiveness. Such strategies include cultural autobiography, equity workshops, cross-cultural interviews, diversity panels (Brown, 2004), culturally focused dialogue (Murtadha-Watts & Stoughton, 2004), readings and videos on equity, analysis of disaggregated student achievement data, cultural analysis of the school's curriculum, and action research for improved cultural responsiveness.

This type of professional learning — first for teacher leaders and then for other teachers — is perhaps the most complex but also the most important development in which teacher leaders can be involved.

### LEARNING DESIGNS

We have outlined what teacher leaders tell us they need to learn to be successful leaders, but what about the structure and design of professional learning for teacher leaders?

Although we are strong proponents of site-based professional learning for teachers, general professional learning for teacher leaders is probably best done at the district level, where teacher leaders from different schools can engage in common skill-building activities, reflection, and dialogue.

The variety of topics cannot be addressed in a short-term program. Teacher leaders need long-term, ongoing professional learning. Moreover, the variety of learning needs teacher leaders report are best met through multiple professional learning designs, with particular activities (and often combinations of activities) matched with different learning needs.

Activities such as demonstrations, skill practice with coaching, simulations, role plays, panel discussions, reflective writing, collaborative inquiry, dialogue, field trips to schools where successful teacher leadership is taking place, and project-based learning are appropriate for different types and stages of professional learning for teacher leaders.

Because each school is unique, and teacher leaders' responsibilities often vary from school to school, teacher leaders also need ongoing professional learning and support at the school level. School administrators and experienced teacher leaders can facilitate job-embedded professional learning for less-experienced teacher leaders through mentoring.

Teacher leaders tell us they learn much from dialogue and problem solving with other teacher leaders from the same school. Critical friends from outside the school can visit the campus regularly to advise and support teacher leaders. And teacher leaders can engage in self-directed professional learning through professional reading, individual reflective inquiry, and reflective journaling.

Teacher leaders report that they have experienced tremendous professional growth through attending regional and national conferences related to their leadership responsibilities, especially when they can interact with other teacher leaders from outside their district.

Professional benefits from attending well-chosen conferences tend to be twofold: Teacher leaders learn from others, but also gain a sense of accomplishment and pride from assisting in the growth and development of other teacher leaders. Teacher leader networks can provide many of the same types of professional growth as conferences, with the added advantage of offering continuous support and opportunities for supporting others.

### IMPLICATIONS FOR ADMINISTRATORS

Our findings on teacher leaders' professional learning needs have implications for district and school administrators as well. Administrators who want to





Teacher leaders tell us they learn much from dialogue and problem solving with other teacher leaders from the same school. Critical friends from outside the school can visit the campus regularly to advise and support teacher leaders.

support teacher leadership need to participate in their own professional development to better understand the value, roles, challenges, and professional learning needs of teacher leaders.

For teacher leadership to flourish, administrators must accept the concept of distributed leadership as the best approach to the renewal of schools, teaching, and learning. In addition, administrators must not only provide resources for but also become active agents in teacher leaders' professional learning.

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# LEARNING *to* LEAD

ACADEMY EXPERIENCE SETS CLASS OF 2014 MEMBER ON A NEW PATH

By Kathleen O'Flynn

**T**hree years ago, I was contemplating my application to the Learning Forward Academy. I had heard wonderful things about the opportunity, yet at the same time I had reservations.

I was concerned that the experience might not align with my school environment. There seemed to be few graduates from the northeastern United States, an area of the country that often has smaller school systems that operate somewhat differently from the county system used in other states. As I reflect on my experience, I realize that none of that mattered. No matter the size, systems are systems.

I have found my experience with the academy to be rewarding. The network of people, the experiences at the conference, and the new learning I came away with each time we were together has been great. I have been able to use protocols, norms, and resources immediately in my role as staff developer. I am increasingly being seen as a resource to others, especially in the area of the Standards for Professional Learning and the information that comes from Learning Forward.

On a more personal level, I am becoming a stronger leader. I have much more skill in taking risks, modeling, and placing greater value on listening and communication skills. More importantly, I understand the steps to the change process in a way that helps me know how to aid others through their own school culture changes.

Finally, the time I give to getting to know people and paying attention to the human aspect is helping me grow the leadership skills that my organization needs. The human elements combined with the proper actions are key to leadership, and I am learning how to mesh the two appropriately.

During my tenure in the Learning Forward Academy, I have grown as an influential leader in professional learning in my work arena. I now develop, support, present, and supervise the professional learning throughout my regional district, which serves eight school systems. I am proud of this accomplishment and credit the time I spent with Learning Forward for giving me a strong foundation and a knowledgeable network of people to learn from. I



Kathleen O'Flynn says her experience in the Learning Forward Academy has made her a stronger leader, with increased skills in risk taking, modeling, listening, and communicating.

will cherish these collegial relationships, and friendships, for the rest of my career.

A mentor of mine recently gave me a gift. It is a plaque that says, "She wasn't where she had been. She wasn't where she was going ... but she was on her way." I am uncertain about what the future holds for me professionally — there are many ideas swirling in my head. No matter what direction I go, Learning Forward's Academy experience has put me on my way.

**Kathleen O'Flynn (o'flynn@nvnet.org) is coordinator of professional learning for Northern Valley Schools in Demarest, N.J., and a member of Learning Forward Academy's Class of 2014. ■**



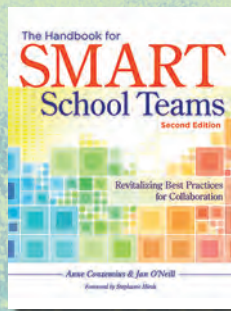
# HOW TO CREATE SMART GOALS USING A TREE DIAGRAM

**S**MART goals are just one of the many valuable concepts Learning Forward Academy members use in their learning experience. Use this tool to learn how to create SMART goals for your school or district.

## WHAT IS A TREE DIAGRAM, AND WHY USE IT?

A tree diagram is a graphic organizer that can help educators make their goals SMART — strategic and specific, measurable, attainable, results-oriented, and time-bound. We use graphic organizers every day — e.g. calendars, planners, PDAs, agendas. They help us organize our thinking, create and monitor plans, connect isolated pieces of knowledge, and make meaning.

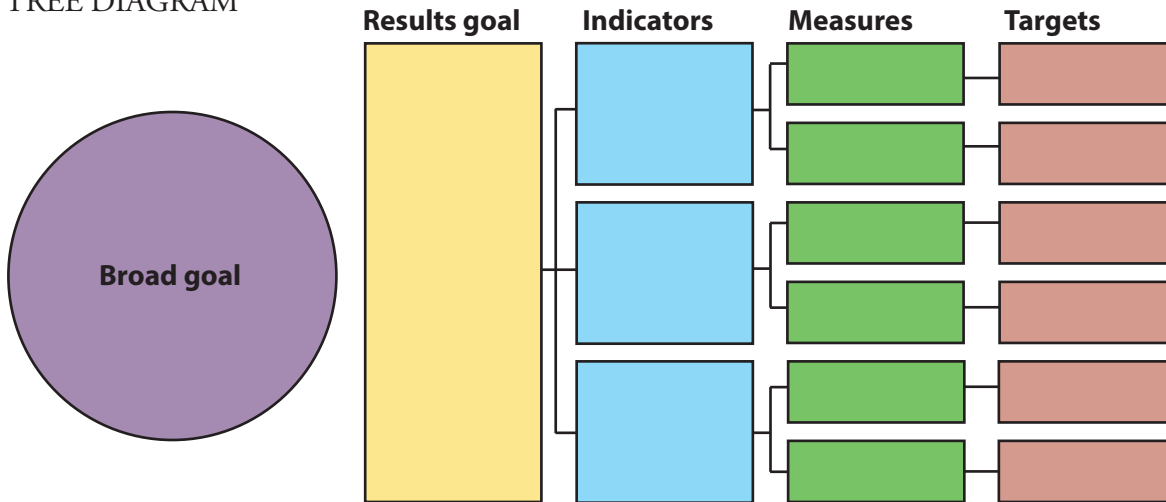
They're especially powerful when used by teams because they help distribute everyone's individual knowledge, making thinking visible by creating a powerful picture of what we are all thinking together. Teams that use the tree diagram to create SMART goals often discover their collaboration becomes more focused and concrete.



**A** much larger discussion on SMART goals and the use of the tree diagram can be found in the introduction and Chapter 9 of *The Handbook for SMART School Teams, Second Edition: Revitalizing Best Practices for Collaboration* (Solution Tree, 2014).



TREE DIAGRAM



HOW DO YOU USE IT TO CREATE SMART GOALS?

**1 BROAD GOAL**

Let's walk through the tree diagram's components using a broad educational goal as depicted in the circle above: *Close the achievement gap in our community.*

**2 RESULTS GOAL**

In the box labeled "results goal," we would put a results-based, more specific goal focused on closing the distance between today and our long-term goal of closing the achievement gap. To do this, review the data to see where the largest discrepancies are (e.g. African-American students) and then set a level that is both attainable and challenging enough to motivate the staff to work hard on it (e.g. if only 50% are graduating now, try for 85%). Establish a time frame. For example, if the long-term goal is a 10-year time horizon, set specific goals that are five years out.

**Broad (long-term) goal**

**Intermediate (more specific, interim) goal**

85% of African-American students will be graduating on time five years from now.

Source: Used with permission of SMART Learning Systems, LLC (smartlearningsystems.com, Fitchburg, Wisconsin).



### 3 INDICATORS

Indicators are the evidence we look for to see if the specific results goal is being achieved. In reviewing data and talking with educational experts, we discover that kindergarten readiness, reading at grade level by 4th grade, and mastering Algebra 1 by 8th grade are important to achieving success. (Using systems thinking, this change theory asserts that while elementary age African-American students won't graduate until years later, the work that needs to happen to align around these indicators will strategically focus the system toward helping all students graduate on time.)

#### Results goal

85% of African-American students will be graduating on time five years from now.

#### Indicators

- Kindergarten readiness
- Reading at grade level by 4th grade
- Mastering Algebra 1 by 8th grade

#### Indicator

Kindergarten readiness

#### Measure

Kindergarten assessment — social, emotional, physical, and cognitive readiness for kindergarten

### 4 MEASURES

Measures are the tools used to gauge progress on each of the indicators. We'll use multiple measures for each indicator, but in this example, we'll show just one kindergarten readiness measure.

#### Indicator

Kindergarten readiness

#### Measure

Kindergarten assessment

#### Target

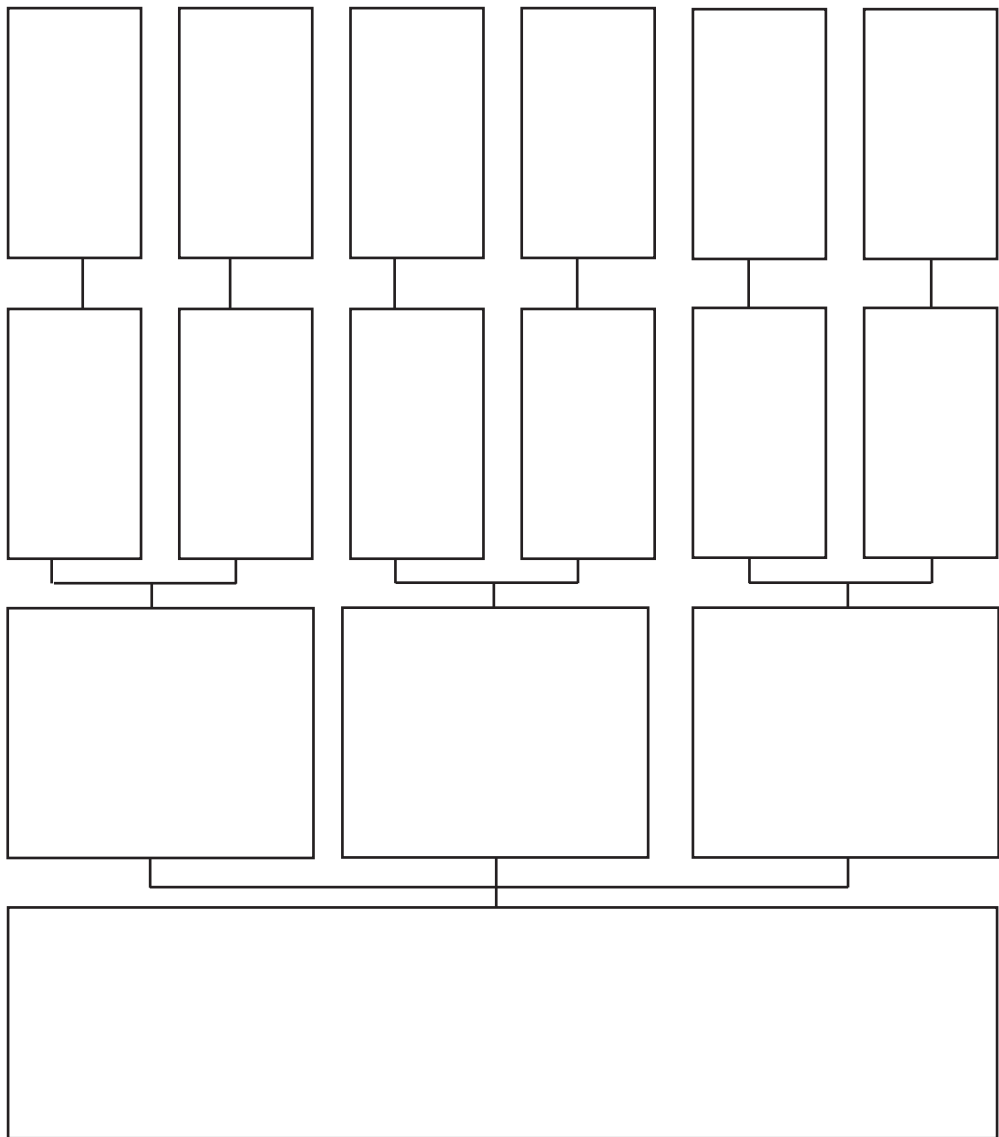
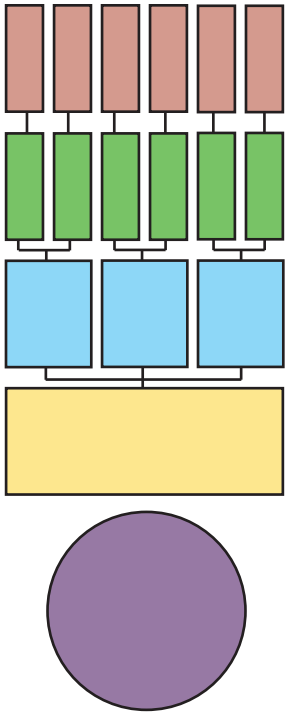
55% of incoming African-American kindergartners will show learning-related skills (letter knowledge, reading sensitivity, self-esteem, self-regulation, social competence, motivation to learn)

### 5 TARGETS

Establishing improvement targets for each measure allows educators to track improvements not only by overall averages but also by subpopulations. Targets can be defined on a year-by-year basis as more incremental steps toward the longer-term goal. In this example, we looked at the data and discovered that, over the past years, only 50% of incoming African-American kindergartners have demonstrated learning readiness on the kindergarten assessment, so we set a target of 55% by next year.

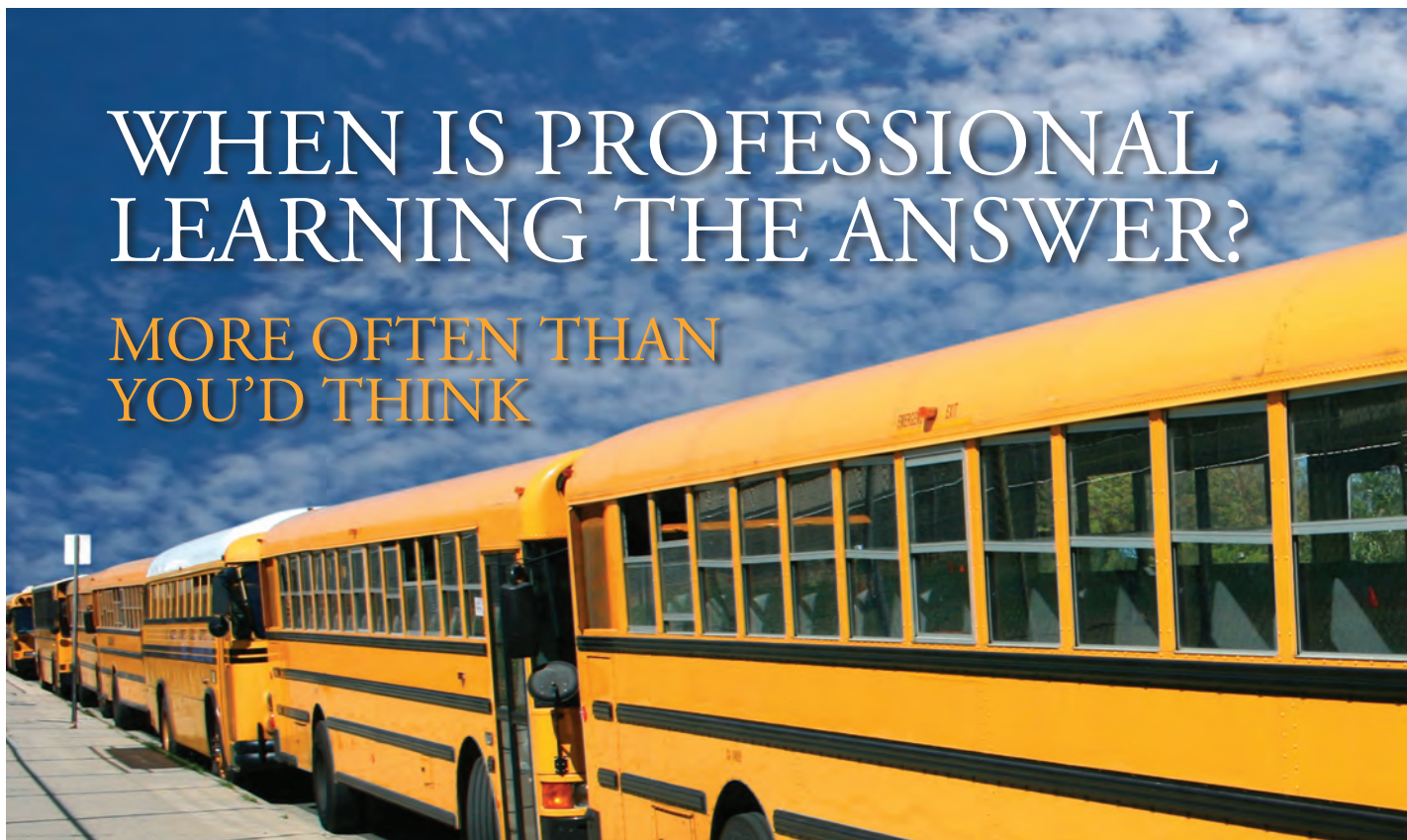
The actions we take to make this target a reality belong in our action plan. (For example, one action might be to pass a pre-K policy so that all children have an opportunity to learn critical skills; another might be to implement a parent education program so that from birth children have high-quality language experiences.)

**USE THE BLANK TREE  
DIAGRAM TO CREATE  
YOUR OWN SMART  
GOALS.**



# WHEN IS PROFESSIONAL LEARNING THE ANSWER?

## MORE OFTEN THAN YOU'D THINK



**By Frederick Brown**

**H**ere's a dilemma many of us in professional learning face. Our colleagues in schools and districts often frame their challenges in the following ways:

- Our students' literacy scores are below district and state averages.
- We need to implement Common Core or our state's new student standards.
- Our student discipline is out of control.
- My principal is about to be removed because the district feels she is ineffective.

As educators grapple with these issues, often they don't see them as professional learning challenges. Instead, they are categorized in other ways that lead schools and districts down paths that can be costly as well as ineffective.

For example, consider low student test scores in a particular content area. The curriculum and instruction department is asked to find new instructional materials that offer more promise in helping students achieve at

higher levels. This solution is based on the assumption that the test score problem comes from ineffective materials.

Negotiations begin with various providers that may lead to the large-scale adoption of new instructional materials or textbooks. Once the new materials are purchased, attention eventually shifts back to professional learning for teachers.

Districts may take similar approaches to student discipline, Common Core implementation, and other issues they feel may require an off-the-shelf solution.



**Frederick Brown**

Meanwhile, in those same districts, those responsible for professional learning see these same problems differently. These professional learning experts recognize their systems aren't structured for adult learning.

Literacy scores may be low because teachers haven't yet internalized the practices associated with the current set of instructional materials. Student discipline may be perceived as out of control because teachers may not have engaged in collective learning with their colleagues, practiced



behavior management strategies, or received feedback from peers. Principals may be seen as ineffective because they haven't yet engaged in their own learning community with their peers.

Taken together, schools and districts that don't have structures and processes for adult learning will always have students who experience varying levels of educator effectiveness, regardless of the issue.

This leads me to our professional learners' dilemma:

- How can we, as professional learning experts, help our colleagues, schools, and districts see their challenges as professional learning issues?
- How can we encourage districts to collect data on the implementation of current practices before they rush to adopt new ones?
- How can we strengthen systems that assess the impact of current professional learning approaches so districts know whether teachers and leaders are implementing the new skills and strategies they experienced as part of a learning program?
- In districts, how can we better connect those responsible for professional learning to those focused on talent management and leadership effectiveness?

We discuss these kinds of questions a great deal at Learning Forward, and often we turn to the Standards for Professional Learning for guidance. I see this particular dilemma as one we need school and system leaders to help us resolve.

In the Leadership standard, Learning Forward posits that leaders must advocate for effective professional learning and the essential role it plays in improving educator practices and student results. We also see that leaders establish structures and resources for learning. Most importantly, they model the importance of continuous learning, and they do this by engaging actively in building their own knowledge and skills around the issues that they face as educators each day.

Perhaps, then, the first step in addressing our dilemma is to ask leaders to publicly state their intention to put learning first, starting — but not ending — with themselves. I wonder what solutions will follow from such actions?

•  
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## Research offers little guidance on professional learning for inclusive education

### WHAT THE STUDY SAYS

Federico Waitoller and Alfredo Artiles, in response to the growing urgency and global interest in inclusive education, conducted a review of the research in professional development in this area. The guiding questions for the research were:

1. How is inclusive education defined in professional development literature?
2. How is professional development for inclusive education studied?
3. How is teacher learning examined in professional development research for inclusive education?

They conclude that current research is fragmented and limited primarily because of how inclusive education and teacher learning are conceptualized. They report that there is a need for “a more robust theory of how teachers learn in complex contexts in which various institutional and professional boundaries overlap” (p. 347).

The authors find that professional development for inclusive education integrates “an intersectional approach in which teachers identify and dismantle

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### At a glance

Prompted by the urgency to address the learning needs of all students, particularly students who are different (students with disabilities, with various ethnic and racial backgrounds, from different family backgrounds, from low socioeconomic backgrounds, etc.), this study examines the findings of a decade of research on preparing and supporting teachers to create inclusive classrooms. Research is limited and insufficient to guide effective professional learning in inclusive education.

### THE STUDY

**Waitoller, F. & Artiles, A. (2013).** A decade of professional development research for inclusive education: A critical review and notes for a research program. *Review of Educational Research*, 83(3), 319-356.

interesting and multiple barriers to learning and participation for all students” (347) and prepares teachers to work collaboratively with other education professionals, families, and students to increase access, participation, and outcomes for all students.

### Study description

After establishing six criteria for selecting and studying research in professional development between 2000 and 2009, researchers chose 42 out of 1,151 articles to examine. From the analysis, they identified trends related to each research question.

They cited four reasons for the study’s significance:

1. The imperative to create more inclusive school systems in which teachers have opportunities to develop the “understanding, skills, critical sensibilities, and contextual

- awareness” (p. 320) to provide quality education for all students;
2. The role of professional development for administrators and teachers in implementing any reform including inclusive education reforms;
3. The importance of comparing previous reviews of research in professional development that did not focus on inclusive education to their current study to understand the current landscape, strengths, and weaknesses from an international perspective; and
4. The need to define the evidence of change in the efforts to move toward more inclusive teachers and schools.

### Methodology

After reviewing the literature in inclusive education, researchers synthesized the findings and identified

## WHAT THIS MEANS FOR PRACTITIONERS

**E**ducation practitioners work with students who manifest differences every day. To create equitable opportunities for access, participation, and achievement for all students and inclusive cultures within schools and classrooms that nurture student success, educators require deep understanding, skills, dispositions, practices, and willingness to address the intersection of multiple differences simultaneously through cognitive and behavioral changes.

This form of professional learning, as evident in the extensive use of action research in the studies examined, increases teachers' "construction of their knowledge that is situated in their daily practice and struggles" (p. 331) and builds their



"confidence and efficacy to use an inquiry approach to teaching, create schoolwide programs to foment inclusion, introduce to teachers practices such as differentiated instruction, and challenge teachers' deficit views of students who struggle to learn" (p. 331).

To acquire the capacity to create schools and systems that implement inclusive education, educators need to engage in continuous learning through collaborative, co-constructed learning that occurs within their daily practice.

six criteria for studies to analyze further. To be included in the analysis, studies needed to meet all six criteria:

1. Focused on questions, hypotheses, or purposes focused on preparing teachers for inclusive education, the impact of professional development on inservice teachers who are implementing inclusive education, or the experiences of teachers implementing professional development on inclusive education;
2. Published in peer-reviewed journals;
3. Occurred within the designated time range of 2000-09;
4. Included participants who were K-12 inservice teachers;
5. Employed qualitative, quantitative, or mixed designs; and
6. Included data collection at a minimum of two points in time.

### Analysis

Researchers used the three research questions to summarize trends in the 42 studies.

### How is inclusive education defined?

- Some studies defined inclusive

education as ability differences and focused on professional development on technical changes in instruction or on curricular changes to address gender and cultural differences. A second set of studies focused on overcoming barriers to participation and learning through ongoing and systemic changes in school culture to value ability differences and increase representation in curriculum, instruction, and assessment.

- Some studies focused exclusively on inclusion as defined as race, class, gender, and culture rather than ability.
- Some studies addressed inclusive education as a process of overcoming barriers to participation and learning for all students.

### How is professional development for inclusive education studied?

- There was a spike in studies in inclusive education mid-decade, and a decrease in the last quarter of the decade.
- The majority of articles were

published in journals focusing on special education.

- The majority of studies of professional development on inclusive education used primarily qualitative methodology, had no specific subject focus, and included predominantly teachers of primary grades as subjects.
- Data sources for qualitative studies included interviews, observations, student and school documents, focus groups, and teacher journals. Mixed method studies employed many of the qualitative sources listed above and supplemented them with surveys and implementation checklists. Quantitative studies used surveys or questionnaires predominantly. Most qualitative studies applied content analyses; mixed method studies used descriptive and inferential statistical analyses; and logically quantitative studies used inferential statistics.
- Fifty-two percent of studies occurred in the United States. Studies in other countries increased in the latter half of the decade studies.

- The studies applied six forms of professional development: action research; onsite training; university classes; professional development schools; and newsletters. The majority of the studies, 70%, applied action research.
- Most studies, 89%, did not examine the impact of professional development on students.

### How is teacher learning examined in professional development for inclusive education?

- Professional development studies focused on teacher outcomes and processes. Outcome studies, accounting for half of the studies examined, explored changes in teachers' cognitive and behavioral perspectives. The unit of analysis in outcome-based studies was the individual teacher. Process-based studies focused on the actions participants take as they apply new strategies and tools and changes in their engagement in communities of practice. The unit of analysis in process-based studies was groups of teachers.

### Results

Waitoller and Artiles identify improvements needed in research and professional development on inclusive education. The researchers' redefined construct of inclusive education broadens the concept to acknowledge its complexity. They advocate a three-dimensional construct that includes "an ongoing struggle toward (a) the *redistribution* of access to and participation in quality opportunities to learn (redistribution dimension); (b) the *recognition* and valuing of all student differences as reflected in content, pedagogy, and assessment tools (recognition dimension); and (c) the creation of more opportunities for nondominant groups to advance claims of education exclusion and their respective solutions (representation

**Researchers claim that existing approaches to professional development on inclusive education that emphasize a single form of student difference fail to acknowledge the interaction among differences and fail to "shed light on how teachers learn to address the needs of students that live with complex and intersecting forms of exclusion"**

dimension)" (p. 322).

Researchers claim that existing approaches to professional development on inclusive education that emphasize a single form of student difference fail to acknowledge the interaction among differences and fail to "shed light on how teachers learn to address the needs of students that live with complex and intersecting forms of exclusion" (p. 338). Researchers advocate the use of an intersectional approach to differences, considering how multiple differences interact and require different approaches to addressing differences and barriers to education.

Researchers identify flaws in existing research. Many studies failed to examine impact on students, report a specific content area, or sufficiently describe analysis procedures and study participants.

Outcome-based studies that focused on individuals do not adequately consider the complex nature of participant change within the political, ideological, and social context of schools. Researchers call for an approach that examines the complex systems in which teachers work and how they learn within the boundaries of their daily work. Process-based studies can be improved, according to researchers, by deepening attention to how teachers learn within

the boundaries of their communities and practice.

### Limitations

The researchers expose a number of limitations within the research on professional development. First, little rigorous research on professional development for inclusive education exists, and most focuses on teachers of students with disabilities. With the growing number of students with differences in classrooms around the globe and the substantial investments by federal agencies to meet the needs of all students, the need for a research-based body of evidence in professional learning for inclusive education is growing rapidly. This requires more research and more studies using quantitative designs.

Another limitation the researchers identify relates to measuring the effects of professional learning. Studies fell into two categories: outcome-based or process-based studies. Outcome-based studies examine the effects at the individual teacher level predominantly. Process-based studies focused on the sequence of actions and events from the participant perspective.

The outcomes examined, however, focus primarily on cognitive (83%) and behavioral (22%) changes in teacher learning. Cognitive changes included teachers' knowledge as well as beliefs about students with disabilities. Only one study examined the impact of professional development in inclusive education on students. While this is disappointing, it is similar to the trend in research in professional development during the last several decades.

While identifying the limitations of current research, Waitoller and Artiles infuse the study with a strong ideological and theoretical orientation toward professional development for inclusive education. ■

# Welcome to the Learning Forward Classroom

Learning Forward's new online courses give you and your team the ability to explore key professional learning topics — on your schedule and at your pace.

Through practitioner videos, readings, research, tools, protocols, and more, these online courses will guide you to a deeper understanding of effective professional learning.

Our first course is an in-depth exploration of the Standards for Professional Learning, including what they look like in action and how to implement standards-based professional learning in your school, system, or organization.

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**From 'gotcha' to growth:**

How principals promote learning in the context of teacher evaluation.

*By Janice Bradley*

The author examines the actions of principals who structured schools to create supportive conditions for teacher growth aligned to the evaluation system and empowered teachers to make decisions about selecting learning designs. These principals recognized that if teachers were to become effective as defined by their state's teacher evaluation rubric, they needed to create structures for job-embedded professional learning along with developing whole-staff capacity for shared ownership in the process.

**Tell me so I can hear:**

A developmental approach to feedback and collaboration.

*By Ellie Drago-Severson and Jessica Blum-DeStefano*

Feedback plays an important role in education. But when and where do educators learn how to give feedback, especially to adults who might make sense of others' words, feedback, and ideas in different ways? A new developmental approach intentionally differentiates feedback so that adults can best hear it, learn from it, take it in, and improve their practice.

**Two sides of the coin:**

Evaluation and support work together to strengthen teaching.

*By Jane Kise*

Like any profession or talent, mastering teaching takes thousands of hours of deliberate practice. If this is true, how can we rate teachers ineffective as they first enter a classroom or even when master teachers are developing new skills? Stakeholders need to recognize that teacher evaluation and support for teacher growth are two distinct value sets that together form an interdependent pair where each set holds a portion of the truth.

**Turn on the light:**

Observation tool connects teacher practice with student learning.

*By Lori Renfro*

In Arizona's Maricopa County, 12 districts collaborated to implement a performance-based evaluation system that supports teachers in attaining,

maintaining, and enhancing core competencies aligned to a common vision of instructional improvement. At its heart is a teacher observation tool where teachers participate in observation cycles and engage in professional learning aimed at improving classroom instruction and student learning.

**Inspire learning, not dread:**

Create a feedback culture that leads to improved practice.

*By James L. Roussin and Diane P. Zimmerman*

How professionals receive and apply feedback is the cornerstone in any system for improving teacher performance. Before systems can build a culture that embraces feedback from a growth mindset, leaders have to understand the barriers that inhibit the receipt of suggested improvements and identify the types of relationships that foster positive interpretations of comments so feedback is accepted as a way of improving professional practice.

**Partners with a purpose:**

District and teachers union create an evaluation system that nurtures professional growth.

*By Kathleen Pham and Amanda Heinemann*

Miami-Dade County Public Schools and the local teachers union created a standards-based teacher evaluation system that includes both student achievement and teacher reflection. Peer reviewers work with teachers to align their practice with educator performance standards in the teacher evaluation system. The peer reviewers facilitate professional learning through coaching, professional learning communities, lesson study, workshops, and observations.

**Policy meets practice:**

Districts feel the impact of state regulations.

*By Helen M. Hazi and Daisy Arredondo Rucinski*

Before the No Child Left Behind Act of 2001, specific types of professional learning were left to local discretion. Since then, the legislation introduced a new kind of accountability in states as well as a definition of high-quality learning. States began to intervene in local policy and practice as they modified teacher evaluation statutes. Looking at trends around the country, the authors identify strategies district leaders can use to improve professional learning.

## features

### Top 10 learning needs for teacher leaders.

By Stephen P. Gordon, Jennifer Jacobs, and Rachel Solis

Based on their studies of and work with teacher leaders, the authors find that, while teacher leaders appreciate learning that focuses on authentic needs, they don't believe they get enough of it. They outline what teacher leaders identify as their top 10 areas of need, including interpersonal skills, knowledge of curriculum and instructional innovations, mentoring, leading reflective inquiry, and addressing diversity.



### Learning to lead:

Academy experience sets Class of 2014 member on a new path.

By Kathleen O'Flynn

A member of Learning Forward Academy's Class of 2014 reflects on her experience. Kathleen O'Flynn says she has become a stronger leader, with more skills in taking risks, modeling, and placing greater value on listening and communication skills. More importantly, she understands the steps to the change process in a way that helps her know how to aid others through their own school culture changes.

### When is professional learning the answer?

More often than you'd think.

By Frederick Brown

Educators face a range of challenges, and more often than not, they don't see them as professional learning issues, but instead as curriculum or discipline problems, for example. Consider how professional learning might be a solution when the questions are framed in new ways.

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### coming up

in February 2015 *JSD*: COACHING / COACHING SKILLS

## columns

### Lessons from research:

Research offers little guidance on professional learning for inclusive education.

By Joellen Killion

Researchers examine the findings of a decade of research on preparing and supporting teachers to create inclusive classrooms.

### From the director:

Teachers and students benefit when evaluation focuses on learning and growth.

By Stephanie Hirsh

The purpose of a teacher evaluation system must be to help teachers achieve their greatest potential — that's the bottom line.

## Writing for JSD

- Themes for the 2015 publication year are posted at [www.learningforward.org/publications/jsd/upcoming-themes](http://www.learningforward.org/publications/jsd/upcoming-themes).
- Please send manuscripts and questions to Christy Colclasure ([christy.colclasure@learningforward.org](mailto:christy.colclasure@learningforward.org)).
- Notes to assist authors in preparing a manuscript are at [www.learningforward.org/publications/jsd/writers-guidelines](http://www.learningforward.org/publications/jsd/writers-guidelines).

## 2 new board members elected

**A**lan J. Ingram and Scott Laurence have been elected to Learning Forward's board of trustees.

Ingram is deputy commissioner at the Massachusetts Department of Elementary and Secondary Education. A five-year member of Learning Forward, he has led state education agency and district-level teams to align and execute professional development initiatives and other educational reform strategies to strengthen the capacity of educators.

He has contributed to the field of professional learning through presentations at the Harvard Graduate School of Education, the U.S. Department of Education, and the American Association of School Administrators as well as being published in *The District Management Journal*.

Ingram's vision for Learning Forward is to uphold systematic and continuous development processes in support of the learning needs of education practitioners and learning organizations to advance student growth and achievement.

Laurence is superintendent of San Mateo Union



Alan J. Ingram



Scott Laurence

High School District, San Mateo, California. A three-year member of Learning Forward, Laurence has been an active affiliate member and leader in establishing Learning Forward California. In his district, Laurence has built leadership capacity in teacher leaders and systems of professional learning. His district is recognized as an organization on the cutting edge of professional development.

Laurence is known locally for presentations in instructional practices and leadership and is a scheduled presenter at the annual conference of school administrators.

Laurence's vision is that Learning Forward will be the recognized leader in the development of teacher leaders that will spur the work needed to implement the Common Core.

Members whose terms expire this year are Jeff Ronneberg and Myra Whitney. The new trustees will join the board at the conclusion of Learning Forward's 2014 Annual Conference in Nashville in December.

### book club

DESIGNING SCHOOLS FOR MEANINGFUL PROFESSIONAL LEARNING:

A Guidebook for Educators

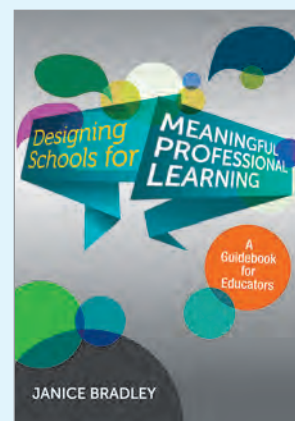
By **Janice Bradley**

**G**rounded in research, learning theories, and Learning Forward's Standards for Professional Learning, this book outlines the processes for selecting and creating learning designs appropriate for and specific to the context and needs of adult learners at their school site.

Designed to encourage educators to take risks and try new practices, this resource offers tools, processes, and procedures that show how to promote adult active engagement. Learn how to create optimal learning experiences that inspire and how learning designs can promote individual and collective creativity with a diverse school staff.

The book includes vignettes and cases of enactment showing how real people in real settings design learning opportunities connected to classrooms.

Through a partnership with Corwin Press, Learning Forward members can add the Book Club to their membership at any time and receive four books a year for \$69 (for U.S. mailing addresses). To receive this book, add the Book Club to your membership before Dec. 15. For more information about this or any membership package, call 800-727-7288 or email [office@learningforward.org](mailto:office@learningforward.org).





## A whirlwind year teaches the value of collaboration

It has been an honor to serve as president of Learning Forward's board of trustees. My sojourn was much like Dorothy's voyage in *The Wizard of Oz*. While making her way to Oz, Dorothy met new friends, encountered struggles, and was besieged with setbacks in her quest to go home. By the end, Dorothy learned life lessons she'd never forget. Throughout my term as president, so did I.

Last December, I accepted the leadership gavel, and, from day one, I knew I wasn't in Kansas anymore. Perhaps you've felt this way, too. The tornadoes that continually whip education to and fro can be unnerving. The whirlwinds of Common Core, next-generation assessments, new teacher evaluation, and accountability systems can easily pitch us off course and far, far from home.

As leaders in professional learning, we must continue to create and share common missions, visions, and plans for the future. We must ask ourselves: Who are we? What do we want to become? Where are we going? How will we know when we've arrived? When districts and schools work together to answer these questions, we gain the knowledge to weather any storm.

Like Dorothy, my journey was fraught with detours requiring the help of friends. Every success, conflict,

**Julie Blaine is president of Learning Forward's board of trustees.**

### on board JULIE BLAINE

unexpected twist in the road, and new relationship unlocked opportunities to learn and grow. Dorothy's first new friend, Scarecrow, confessed he had no brain to think with and nothing to offer. Turns out, Scarecrow actually had much to contribute. He helped his team unlock seemingly impossible circumstances in order to find what was possible. The lesson for me is that inviting diverse thinkers to our learning tables creates advantage. We should value each voice, encourage togetherness, invite in every seeker of knowledge, and lead forward with heads and hands together.

Enter the Tin Man. He thought he didn't have a heart, but it's easy to find evidence to the contrary. Tin Man actually loved much along the way. So have I, especially the feeling that I'm in a zone of true learning. Remember how you felt when you first learned to ride a bike? That drive to conquer those two wheels of freedom completely overrode the fear of falling. That's what this leadership role has been like.

We fall down all the time. In the beginning,

we need friends to help us get back up and have another go at it. Perseverance, motivation, and fun build a solid faith in our abilities to master each new challenge — and they build heart.

Then comes the Cowardly Lion, a scaredy-cat in need of courage. He learned much from his trekking experiences — so much so that, in the end, he received a badge of courage. Doing what's right in our business frequently requires not only courage but also sacrifice.

Leadership requires courage. How will we make our voices heard for continued professional learning? How will we address the inevitable political tornadoes yet to come? Where will we find our courage? If we are courageously honest, we know we will always face educational challenges that perturb our beliefs, challenge our commitments, and place roadblocks in front of our ultimate destinations. We must be

prepared for courageous conversations and tenacious actions.

Each step of my yellow brick road was full of collaborative input and brilliant insights, ardent relationships of heart, and passionate courage from indomitable colleagues. It was an amazing educational experience. ■





# Learning Forward adopts new vision and mission

Learning Forward’s board of trustees has adopted new vision and mission statements to address a broader audience, make powerful statements about why professional learning is so important, and provide sufficient clarity about the work of the organization.

The new statements are the result of months of discussions among Learning Forward staff and board members.


“We’re hopeful that these statements will speak to members past, current, and future as a compelling aspiration for what we all strive to achieve,” says Executive Director

**The new vision statement:**  
Excellent teaching and learning every day.

**The new mission statement:**  
Learning Forward builds the capacity of leaders to establish and sustain highly effective professional learning.

Stephanie Hirsh. “In the near future, we will be writing more about what the vision and mission mean for us as an organization, how they may influence

our work, and the connection between the mission and vision and our beliefs and priorities.”

<p><b>STATEMENT OF OWNERSHIP, MANAGEMENT, AND CIRCULATION</b> (Required by 39 USC 3685)</p> <ol style="list-style-type: none"> <li>1. <b>Publication title:</b> <i>JSD</i></li> <li>2. <b>Publication number:</b> ISSN 0276-928X</li> <li>3. <b>Filing date:</b> Dec. 1, 2014</li> <li>4. <b>Issue frequency:</b> Bimonthly</li> <li>5. <b>Number of issues published annually:</b> Six (6)</li> <li>6. <b>Annual subscription price:</b> \$89.00</li> <li>7. <b>Complete mailing address of known office of publication:</b> 504 S. Locust St., Oxford, OH 45056. <b>Contact person:</b> Leslie Miller. Telephone: (513) 523-6029</li> <li>8. <b>Complete mailing address of headquarters or general business office:</b> 504 S. Locust St., Oxford, OH 45056</li> <li>9. <b>Full name or complete mailing address of publisher, editor, and managing editor:</b> <b>Publisher:</b> Learning Forward, 504 S. Locust St., Oxford, OH 45056 <b>Editor:</b> Tracy Crow, 674 Overbrook Dr., Columbus, OH 43214 <b>Managing editor:</b> Sue Chevalier, 3114 Vinsetta Blvd., Royal Oak, MI 48073</li> <li>10. <b>Owner:</b> Learning Forward, 504 S. Locust St., Oxford, OH 45056</li> <li>11. <b>Known bondholders, mortgagees, and other security holders owning 1 percent or more of total amount of bonds, mortgages, or other securities:</b> None.</li> <li>12. <b>Tax status:</b> Has not changed during preceding 12 months.</li> <li>13. <b>Publication title:</b> <i>JSD</i></li> <li>14. <b>Issue date for circulation data below:</b> October 2014 (Vol. 35 No. 5)</li> </ol>	<p><b>15. Extent and nature of circulation</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;"></th> <th style="width: 15%; text-align: center;">Average number of copies of each issue during preceding 12 months</th> <th style="width: 15%; text-align: center;">Actual number of copies of single issue published nearest to filing date</th> </tr> </thead> <tbody> <tr> <td>a. <u>Total number of copies</u></td> <td style="text-align: center;">5,634</td> <td style="text-align: center;">5,300</td> </tr> <tr> <td>b. Paid and/or requested circulation</td> <td></td> <td></td> </tr> <tr> <td>    1. Sales through dealers and carriers, street vendors, and counter sales (not mailed)</td> <td style="text-align: center;">None</td> <td style="text-align: center;">None</td> </tr> <tr> <td>    2. 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The K-1st dual language vertical team from Tombaugh Elementary School in Las Cruces, New Mexico, includes, from left: Laurie Maese, Kathryn Million, Soledad Muniz, Gloria Olivas, Maria Sanders, and Bobbi-Lynn Pacheco.

## New Mexico team wins Hord award

The K-1st dual language vertical team from Tombaugh Elementary School in Las Cruces, New Mexico, is the winner of the 2014 Shirley Hord Learning Team Award, sponsored by Learning Forward and Corwin.

The award, which honors Shirley Hord's research on learning communities, is given annually to a team of teachers that demonstrates Learning Forward's definition of professional learning in action.

The winning team focused its collaborative work on developing and implementing a professional learning design model to improve mathematics instruction for English language learners. The team will be recognized at Learning Forward's 2014 Annual Conference in Nashville.

"It is very easy to recognize the energy, enthusiasm, and commitment to students that the Tombaugh learning team demonstrates," said Learning Forward Scholar Laureate Shirley Hord. "They are a self-organizing, self-managing collaborative group of educators that studies student data, research, and best practices in order to make decisions about their own professional learning based on the needs of their students."

See the team's winning video at [www.learningforward.org/get-involved/awards/2014-hord-award-winner](http://www.learningforward.org/get-involved/awards/2014-hord-award-winner).

### LEARNING FORWARD CALENDAR

- Dec. 16:** Twitter chat. [www.learningforward.org/learning-opportunities/twitter-chats](http://www.learningforward.org/learning-opportunities/twitter-chats).
- Jan. 31, 2015:** Deadline for proposals to present at the 2015 Annual Conference in National Harbor, Maryland, Dec. 5-9, 2015. [www.learningforwardconference.org/conferenceproposals.html](http://www.learningforwardconference.org/conferenceproposals.html)
- Feb. 15, 2015:** Manuscript deadline for August 2015 *JSD*. Theme: Learning with the best (conference spotlight).
- Feb. 26-27, 2015:** 2015 Winter Institute, Black Canyon Conference Center, Phoenix, Arizona. [www.learningforward.org/learning-opportunities/institutes/winter-institute](http://www.learningforward.org/learning-opportunities/institutes/winter-institute)
- March 15, 2015:** Application deadline for Learning Forward Academy Class of 2017. [www.learningforward.org/learning-opportunities/academy/application](http://www.learningforward.org/learning-opportunities/academy/application)



THE PROFESSIONAL LEARNING ASSOCIATION

**LEARNING FORWARD'S PURPOSE:** Every educator engages in effective professional learning every day so every student achieves.

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Introduce stakeholders at any level to the concept of a comprehensive professional learning system with Learning Forward's latest brief, created with the support of the Sandler Foundation in collaboration with the Council of Chief State School Officers. *Meet the Promise of Content Standards: Developing a Comprehensive*

*Professional Learning System* provides an introduction to an infrastructure for developing individual, school, team, and school system capacities needed to ensure success for all educators and their students. This resource is drawn from the complete workbook *Comprehensive Professional Learning System: A Workbook for States and Districts*.

[www.learningforward.org/publications/implementing-common-core](http://www.learningforward.org/publications/implementing-common-core)



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[www.learningforward.org/learning-opportunities/webinars/webinar-archive/engaged-teaching](http://www.learningforward.org/learning-opportunities/webinars/webinar-archive/engaged-teaching)

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## Teachers and students benefit when evaluation focuses on learning and growth

The purpose of a teacher evaluation system must be to help teachers achieve their greatest potential — that’s the bottom line. In more than three decades working with teachers, I have rarely met a teacher who has lost interest in learning more in order to better serve students. Yes, I have met teachers who were disillusioned when they struggled in classrooms and didn’t know where to turn for support. I have met teachers who were overwhelmed by the number of initiatives they are asked to implement over the course of one year.

However, these are not teachers who will best be served by an evaluation process designed to assign them a label. These are teachers who need an evaluation system that is designed to help them improve daily, provide ongoing feedback, and advance them along the continuum of effectiveness. In short, teachers need evaluation systems built on a continuous improvement cycle.

Evaluation systems built with such an approach include these elements:

**Teachers have access to multiple forms of data to guide the creation of their annual improvement goals.** Teachers access many types of student performance data, and they have

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**Stephanie Hirsh ([stephanie.hirsh@learningforward.org](mailto:stephanie.hirsh@learningforward.org)) is executive director of Learning Forward.**

multiple sources of feedback on their own performance.

**Teachers align their goals with other teachers, their learning team colleagues, and the entire school.** They know the value of shared vision and goals. They know they are much more likely to be successful in achieving their goals when others are working toward the same ends, resulting in more powerful impact on all students.

**Teachers use multiple sources of support and information in creating their learning plans.** They have evidence about the instructional strategies they will be working to master in concert with their colleagues. Team and school goals about the curriculum and student outcomes inform their learning choices.

**Teachers engage in professional learning to acquire new knowledge and skills on their own and with team members and the entire faculty.** Their learning experiences are varied, with learning designs selected carefully to match the desired outcomes of the learning and needs of the learner.

**Teachers get classroom-based support to implement new strategies.** They have opportunities to practice with the help of coaches or colleagues, and they hear feedback right away to deepen their understanding of what they are doing and how to improve.



**Teachers have a variety of ways to monitor the impact of the improvements they attempt to make in their practice.** They check regularly for student understanding; their supervisors and coaches do informal walk-throughs to offer input on specific elements.

While a cycle doesn’t have an end point, the end of the year brings an opportunity for teachers and supervisors to reflect together to determine the degree to which the teacher was successful in achieving the goals and where to focus next year. The cycle continues because committed professionals know that as long as there is one child who has not achieved all we want for him, there is still much to learn and apply.

The cycle of continuous improvement is so compelling to me because I believe in the power of learning and growth. And I know I’m not alone. For those of us who share that belief, any choice, approach, or system that doesn’t support effective teacher learning just doesn’t make sense. Do you agree? ■



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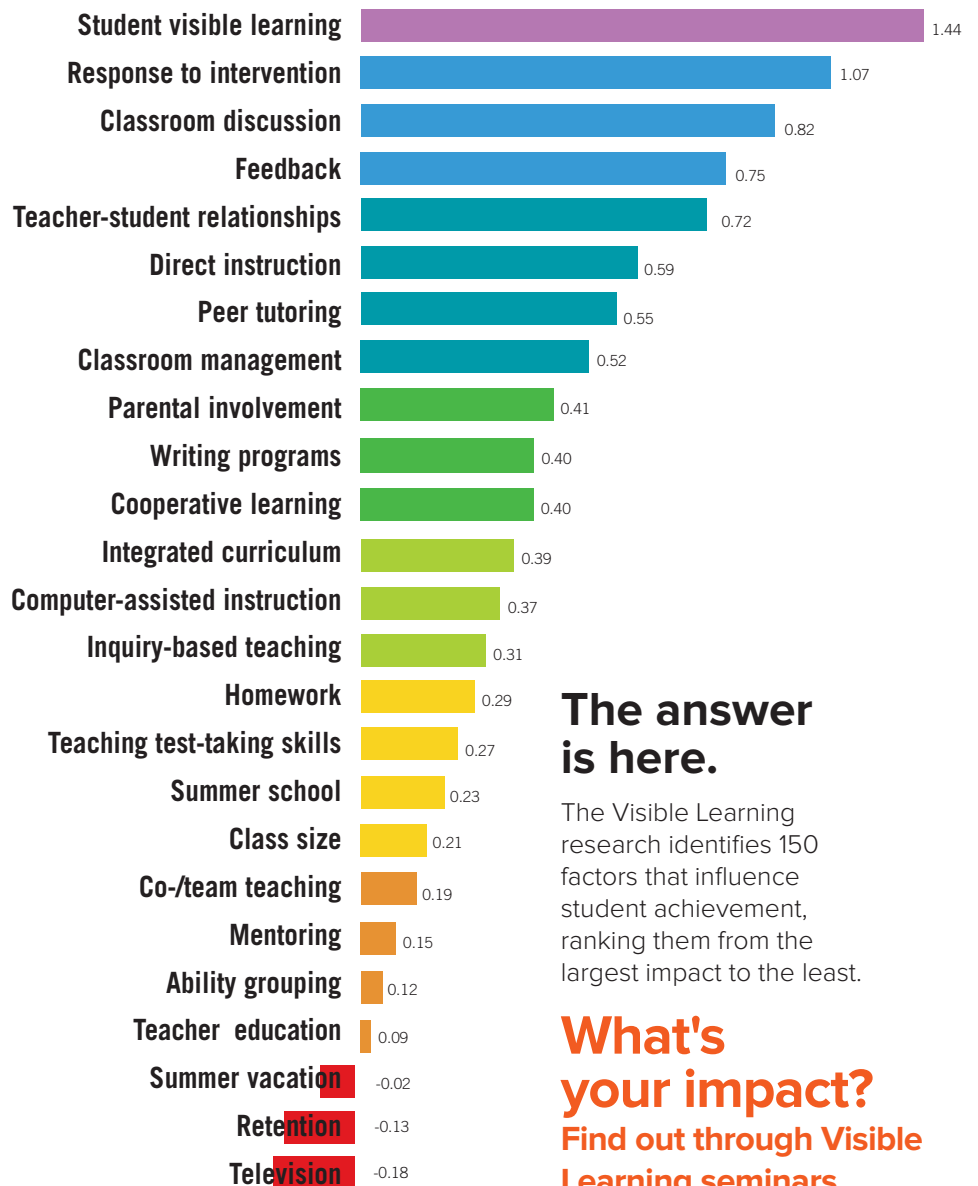
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