Coaching Resource Guide for Time Change Coaches
2010- National SAM Project
Carol Lensing/Janet Young
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Welcome/Project Overview

- Welcome
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- Contact list of Time Change Coaches
Welcome/Project Overview

This guide is intended to support Time Change Coaches involved in the SAM project. We hope you find the information contained in this document, as well as the resources and items referenced to be helpful in your important work as a Time Change Coach.

Project Overview: The SAM project was started in 2002 in Louisville, KY when the Wallace Foundation commissioned Mark Shellinger to conduct a study on the effect of time on the life of the principal. The project began with three pilot elementary buildings and since that time has spread to nine states with almost 300 teams actively involved in the project at all levels. The project involves people in a school, including someone designated as the SAM, who work to support the principal as the instructional leader in the building by removing many of the management duties from the day-to-day life of the principal so that they can focus their efforts on instruction and student learning. The role of the Time Change Coach in the SAM project is essential to long-lasting change of culture because you as a coach provide the support, encouragement, and challenge that the principal needs to be successful in this paradigm shift. Please use this guide as you take this important journey with your SAM/principal teams.

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FREQUENTLY ASKED QUESTIONS: NATIONAL SCHOOL ADMINISTRATION MANAGER PROJECT

This document is intended to help education leaders participating in the National SAM Project answer questions and guide conversations.

What is the National SAM Project?
The SAM Project is a pilot funded by The Wallace Foundation to help develop a better understanding of how principals use their time and to develop strategies to help principals manage their days to have more time to for instructional leadership. The goal of the project is to shift the role of the principal to focus less on management duties and more on teaching practice, student learning and school improvement.

How and when did the SAM Project begin?
The SAM Project began in Louisville, KY, in 2002 as a study – the Alternative School Administration Study – that examined the use of principal time. The study looked at conditions that prevented principals from making instructional leadership their priority and developed strategies to change those conditions.

How does the SAM Project help principals?
The SAM Project helps principals use data to reflect on their practice and develop a plan to reframe their roles, become more effective leaders and improve student achievement. As part of the process, principals establish baseline data, analyze results from school and community surveys and set goals to increase time spent on improving teaching and learning. To facilitate this effort, schools can create a position for a School Administration Manager (SAM), who will meet with the principal daily to review how time is spent and management duties are distributed. The process encourages principals to build strong professional development communities and to strengthen relationships with teachers, parents and students as part of their school improvement efforts.

What are the reactions of participating principals and other school administrators?
Feedback from principals and superintendents in the SAM Project has been positive. As one principal in Iowa said of the project, “I can’t imagine life without this.” Principals report that participation in the project gives them time to spend in classrooms and to focus more on leading instruction and increasing student achievement. District administrators also welcome the SAM Project. “[It’s] cutting-edge leadership,” one Kentucky superintendent said. Another said, “For us to go out on a limb like this, we’re definitely sold on the value. I know I’ve got three happy principals. I think everybody feels good when they think they can be effective.” A major review of the SAM Project is being carried out by a team of researchers, to be completed in spring 2009.

What does “instructional leadership” mean in terms of daily activities of principals?
Instructional leaders make high-quality teaching and learning the top priority of the school and set processes in place to make this vision a reality. Among other responsibilities, instructional leaders establish and promote high expectations for students and staff, engage in classroom observations and collaborate with teachers and staff on implementing instructional best practices. They are able to keep their focus on these priorities, while also ensuring that the demands of managing the school are met.

Who is using the SAM Project now?
Nine Wallace partner states are participating in the SAM pilot. These states are California, Delaware, Georgia, Illinois, Iowa, Kentucky, Missouri, New York and Texas.

How does the SAM Project improve student achievement and help struggling schools? Is there research to back up these findings?
Initial data from three Louisville, KY, schools in the SAM pilot are promising. They show that these schools have posted increases on state assessments that have outpaced the average increases for their districts and the state. In addition, three years after joining the project, principals in these schools report they are spending over 70 percent of their time on instructional issues. More research is under way in schools in the nine states that make up the national SAM Project. A more complete picture of the impact that the process has on students and schools will be made available when this review is complete in spring 2009.
What is Time/Task Analysis Data Collection™? When is data collected and how is it used?
Time/Task Analysis Data Collection is a week-long record, in five-minute increments, of how a principal’s time is spent. Baseline data is collected at the beginning of participation in the SAM Project. This baseline data is used to set goals for the principal to spend more time on instructional leadership. Data collection is repeated annually to evaluate to what extent the principal has changed how he/she spends the day.

What is TimeTrack™?
TimeTrack is a software calendar program that was developed to review precisely how a principal’s time is spent. The principal and SAM use this tool together during their daily meetings to help analyze the principal’s daily activities and better distribute managerial tasks.

What is a Time Change Coach?
A Time Change Coach is a retired school administrator who is selected and trained to discuss progress and challenges and identify training needs with the principal/SAM team. The principal, SAM and Time Change Coach discuss progress and challenges and identify training development needs. The Time Change Coach also helps build support networks of SAMs and principals.

How can my school/district become part of the SAM Project?
The SAM Project is a pilot effort underway in nine Wallace partner states and several districts and schools within those states. Funding has provided training to ensure guided implementation. The pilot project is under review and once that review is finished in spring 2009, The Wallace Foundation will determine the next steps for the project and future expansion.

How much does it cost to implement the SAM Project?
As part of the pilot project, The Wallace Foundation has funded annual data collection and coaching services for principals: approximately $2,400 per school site, per year. Districts fund salaries for the SAMs, either by creating a new position or by giving SAM responsibilities to an existing staff member. Most districts that create a SAM position fund this individual at about the same level as a beginning teacher.

Can my school/district implement the SAM Project without adding a new position?
Depending on their available resources, schools and districts can implement several models of the SAM Project. In the first, a new, full-time SAM position is created. A second model redesigns a current position, so that a current staff member takes on the full-time role of a SAM. In the third model, additional SAM duties are assigned to an existing position. Finally, if resources are limited, schools and districts can choose to use only Time/Task Analysis Data Collection to provide baseline data to the principal and enable him/her to set goals and measure change.

How much time does the principal spend working with a SAM to track his or her time/duties?
Principals spend 30 minutes a day with a SAM in a daily meeting to track time, organize their schedules and identify barriers to spending time on instructional leadership. In every school participating in the SAM Project, principals have increased the time spent on instructional leadership by focusing the use of their time.

Many principals never seem to work directly with students or teachers on instruction, yet are still successful. Why do principals need to change?
The role of the principal has changed. Principals were once expected to be building managers, but they are now held responsible for improving student achievement. Political leaders have shifted responsibility to principals because the research is clear: principals engaged in instructional leadership make a tremendous difference in student performance.

Is this model right for all principals? What about principals who are strong managers?
The SAM Project is a voluntary professional development process that the principal and school community mutually agree to engage. Most principals are strong managers, but it takes different skills to be a successful instructional leader. Management duties are important, but principals need to use their authority, expertise and skills to move instruction forward.

Where can I find more information about the SAM Project? Can I talk to someone who is already part of the SAM Project?
For more information on the SAM Project, visit www.SamsConnect.com and www.wallacefoundation.org/sam.
## Time Change Coaches
### Natl. SAM Project- 2010

<table>
<thead>
<tr>
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<th>State</th>
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• Logistics & Organization
  o Coaching Questions/Answers
  o Coaches responsibilities
  o Goals & Guidelines
  o Ethics for Time Change Coaches
  o Site Visit Protocol
  o Time Track training
  o ORID Questioning
  o ORID Chart with examples
  o Document- Planning for a coaching conversation using ORID
  o Site Visit “look fors”
  o FAB 5- Areas of Delegation
  o SAMS transition template
## COACHING QUESTIONS: WHO DO I CALL?

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>TO ADD A NEW TEAM OR TO DROP A TEAM</td>
<td>Notify your state coordinator. Have them submit the form available on <a href="http://www.samsconnect.com">www.samsconnect.com</a></td>
</tr>
<tr>
<td>TO SCHEDULE DATA COLLECTION</td>
<td>Make a request for baseline or annual data collection to your state coordinator</td>
</tr>
<tr>
<td>TO CHANGE TEAM PARTICIPANTS</td>
<td>Submit the change form available on <a href="http://www.samsconnect.com">www.samsconnect.com</a> and notify your state coordinator</td>
</tr>
<tr>
<td>TO RECEIVE COPIES OF DATA REPORTS OR SCHOOL PROFILE SHEETS</td>
<td>These forms will be sent to you electronically within 10 days of data collection. If you need it sent again, send an email to Jim Mercer at <a href="mailto:jim.mercer@jefferson.kyschools.us">jim.mercer@jefferson.kyschools.us</a></td>
</tr>
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<td>TO CHANGE TIMETRACK TO THE WEB VERSION</td>
<td>Submit Time Track Web Access form available on <a href="http://www.samsconnect.com">www.samsconnect.com</a></td>
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<tr>
<td>TECHNOLOGY PROBLEM SHOOTING</td>
<td>Ask for assistance from another coach or an experienced team, or your state coordinator; or submit a Time Track Support Ticket, available on <a href="http://www.samsconnect.com">www.samsconnect.com</a></td>
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<td>TO ASK FOR ADVICE WITH A DIFFICULT SITUATION</td>
<td>Call your state coordinator or another coach to discuss. Ask Carol Lensing to place your question on the agenda for the monthly WebEx conference for all coaches. If necessary, call Mark Shellinger, National Director</td>
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BASIC EXPECTATIONS OF THE TIME CHANGE COACH

⇒ Schedule coaching visits each month during the school year.

⇒ Plan for those visits in advance so that you meet the individual needs of each team, and keep a record of your visits.

⇒ Follow the guidelines as listed on the Ethics for Time Change Coaches sheet. In particular, maintain confidentiality expectations regarding data.

⇒ Become skilled in the use of Time Track so that you can answer questions.

⇒ Use facilitative/collaborative coaching strategies the majority of the time; use directive/instructional strategies sparingly.

⇒ Participate in monthly WebEx conference calls for coaches. If you cannot participate live, you are expected to call in to listen to the recorded conference.

⇒ Become familiar with the school district in which you serve so that your work complements its goals.

⇒ Become fully versed in the SAMs Project history, goals, research, tools and processes.

⇒ Celebrate the successes of your teams!
Time Change Coach/SAMs/Principals Goals and Guidelines

The goal of the SAM’s Time Change Coach (TCC) is to:

♦ Support the principal’s goal of increased instructional leadership time;
♦ Support the goal setting of the Principal/SAM based on data;
♦ Support the SAM’s in building a professional relationship with the Principal;
♦ Support the improvement of instructional performance of the Principal and SAM;
♦ Provide confidential support to the Principal and SAM at all times;
♦ Provide a face-to-face meeting time at least once a month for the Principal/SAM and Time Track Meeting.

Guidelines for the coaching relationship:
♦ Confidentiality is of the utmost importance;
♦ No data or information gathered in the monthly meetings will be shared with anyone without the agreement of all parties concerned;
♦ Meetings with the TCC will be held at least monthly: the meetings will consist of observing a Time Track Meeting, conducting an individual meeting with the Principal, and holding an individual meeting with the SAM;
♦ A log of data and goals will be kept to document meetings;
♦ Regular reflection on the coaching process will occur with Principal, SAM & TCC;
♦ The Principal, SAM & TCC will be respectful of time regarding observations, meetings, etc. and will be prepared for the time together;
♦ Goals will be reviewed each month.

Signature and Date of TCC, Principal, SAM

TCC_________________________________ Date________________________

Principal____________________________ Date________________________

SAM_______________________________ Date________________________
Ethics for Time Change Coaches (TCC) SAMs Model

As a TCC, I will:

- Support the principal’s goal of increasing their instructional leadership time;
- Conduct myself in a manner that serves the goal of doing what is best for each person;
- Construct clear agreements with my coachees and honor all agreements with the same;
- Coach with the goal of supporting the development of leadership aligned with accepted professional standards;
- Build trust in the coaching relationship through open communication, meeting my commitments, and by operating within areas of competence;
- Ensure that the coachees understand the terms of the coaching agreement between us;
- Respect the confidentiality of this relationship unless authorized by the coachee or required by law;
- Coordinate with and support the goals of the coachees while guarding confidentiality and nurturing collaboration between parties;
- Recognize the value added as a TCC and note and recommend changes when my coachees are no longer benefiting from the coaching relationship and would be better served by another coach;
- Recognize when the potential for a conflict of interest arises and discuss the conflict with my coachees to reach agreement with my coachees on how to deal with it in whatever way best serves the coaches and maintains the integrity of the SAM program.
SAMs Time Change Coach Site Visit Protocol

1. Meet with SAM (20 minutes)
   a. check/review expectations for visit
   b. review TimeTrack data
   c. identify progress, challenges
   d. identify SAM training needs

2. Meet with Principal (20 minutes)
   a. Check/review expectations for visit
   b. review TimeTrack data
   c. identify progress, challenges
   d. identify Principal training needs

3. Observe TimeTrack daily meeting (20 minutes)
   a. discuss meeting (10 minutes)
   b. schedule next visit

Options to offer Principals/SAM
   a. Observe, informally shadow, SAM
   b. Observe, informally shadow Principal
   c. Exit meeting
Time Change Coach Site Visit “Look-Fors”

**TimeTrack Use**

**Examples:**
Data has been entered using calendar.
Graphs and calendar have been printed.
Goals have been established.
They have questions about the tool & how to use it.

**Questions**
A. Is the Sam comfortable using the tool?
B. How do they use the calendar?
C. Are they using the graphs/Data in daily meeting?
D. Are they using the calendar?
E. Are they using the descriptors graph to help the principal identify gaps?

**Daily Meetings**

**Examples**
Meeting daily to discuss data.
Goals are reviewed.
Calendar is reviewed and discussed.
Review graphs.

**Questions**
A. Are Sam & Principal getting used to procedure?
B. Are they reviewing calendar & Graphs from TimeTrack?
C. Is the Sam asking reflective questions?
D. Are they coding Instruction properly?
E. Are the identifying more instructional opportunities?
F. Are they identifying Management opportunities to move?

**SAM**

**Examples**
What does the Sam have responsibility for?
What does the principal see as low hanging fruit to transition?
SAM’s calendar/schedule
SAM’s interactions with staff throughout the building
SAM’s relationship with the principal
Graphs are regularly printed and reviewed and analyzed with principal
Questions
A. What does the Sam understand their job & principal job to be?
B. What is the biggest challenge you are facing in your position as a SAM?
C. How does your principal respond to your suggestions/challenges?
D. What is the best part of the job?
E. What has the principal done to relinquish his/her management tasks? What do they need to let go of?
F. What could your principal do to better support you in your position?
G. How does your principal respond to your review of data daily and monthly, especially in those times when there is not a lot of growth?
H. What does the principal understand their job & Sam job to be?
I. Is the SAM in a good location to perform job responsibilities and work with staff?

Introductions and acclamation to the school/Position

Examples
Introduced to all personnel.
Letter sent to parents about new roles.
Clear responsibilities established for SAM similar to job description.

Questions
A. Has the Sam been introduced to all school personnel/parents/ community?
B. Has the principal explained his/her change in focus?
C. Is there an on-going effort to communicate role responsibilities?
D. Does the SAM meet with direct reports regularly and communicate purpose?
E. Have they identified areas or responsibilities to transition?
F. Have they developed any plans to transition non instructional items?
G. Are they monitoring staff, student and parent reaction to the change?

Principal

Examples
Principal makes sure that time is allotted and occurs each day for meeting with the SAM
Principal regularly reviews his/her graphs using the TimeTrack tools and understands how to make the necessary changes
Principal’s follows daily and weekly schedule
Principal’s interactions with staff throughout the building
Principal’s relationship with the SAM

Questions
A. Is their location aiding in improving instructional time?
B. Has the principal tried using a satellite office for part of the day?
C. When I review your baseline data, I notice that you had 0% of time that you spent on “feedback to teachers” (or whatever their lowest area was).
Specifically what have you done to ensure that you are providing meaningful feedback to teachers after you have been in their classroom? How can your SAM assist you in this goal?

D. Which area within the area of instruction would you most like to work on improving? What can your SAM or I do to help you accomplish that goal?

E. Which area of management has it been most difficult to turn over to your SAM?

F. How are your parents responding to the change in how things operate at your school? What do they see in how you function differently as the principal now that you have a SAM?

G. How realistic is the goal you have set for yourself in terms of % instructional time to achieve in the first year? How do your monthly goals assist you in reaching that goal?

H. As you look at your month to month growth data, what are you most pleased with? What are you most frustrated by?

**Overall**

Questions:

A. Are they making progress overall?

B. Are they developing a productive relationship?

C. What is the chemistry like?

D. Do they understand the complexity of the change they are undertaking?

E. Does SAM and Principal recognize how tough this is?

F. What are their next steps?
TimeTrack Training

If you will be using the stand alone version, make sure the TimeTrack version you have loaded on your PC to use for this training is current. Use following website to download the stand-alone version of the software (not Mac compatible at this time): http://samsconnect.com

The web-based version of Time Track is available also. Teams that wish to use and/or switch to the electronic version should contact Jim Mercer to indicate their desire to do so and to request login and a specific password.

Training is very similar for both the stand-alone and web-based versions of the Time Track software.

1. Purpose

(Explain that TimeTrack is an electronic calendar that creates a running record for the principal of progress made toward increasing time spent on instructional leadership. TimeTrack starts with the baseline data for the week long shadowing, or Time/Task Analysis, and the principal/SAM then set goals for the year. The instructional descriptors in TimeTrack align with the descriptors used in the Time/Task Analysis. The shadow returns to do the Time/Task Analysis one year later. TimeTrack also provides charts on the amount of time a principal spends with each teacher. TimeTrack is to be used in the SAM/Principal Daily Meeting.)

2. Explain how to Load on a computer

3. Demonstrate 1- 7- 31 calendar view

4. Demonstrate how to set the student contact days for the year.
5. Demonstrate how to set the beginning and ending times for the year.

6. Demonstrate in calendar view how to change the start/end time of an individual day without changing all days.

7. Demonstrate how to set the GOAL for each month.

8. Demonstrate how to change a day from student contact to non-student contact on the calendar page.

9. Add an event (demonstrate a Management entry, an Instruction entry and a Personal entry)

10. Duplicate an event (demonstrate another Instruction Entry and duplicate it through the end of the school year)

11. Delete one day of a duplicated event without deleting the others.

12. Demonstrate how to print a calendar view...or anything else you see on TimeTrack

13. Settings
   a. Go through each item on the settings menu—spend extra time on Resource and Network as they are new

14. Graphs and Reports: Demonstrate how to access each graph and report.

15. Demonstrate how to save to your desktop and then email a graph

16. Demonstrate how to save to your desktop and then email a monthly report to your coach (necessary only with the stand-alone version)

17. Demonstrate how to use the HELP menu
18. **Technical Support, Jim Mercer:** Explain the Jim Mercer provides technical support for TimeTrack but he should only be contacted after the SAM has tried using the HELP menu. Contact with Jim should only be initiated via email. Provide a description of the problem and your phone number.

19. **Time Change Coaches:** Explain that the Time Change Coaches observe the Time Track Daily Meeting when they visit each month. Many coaches will request a monthly report, or will access the principal’s data through web-based Time Track
ORID Questioning

- A coaching strategy designed to assist with evaluations, reflection about practice, and skill development
- Purpose is to create a meaningful dialog that results in eliciting, mot presenting, solutions for change
- Use at the supportive/facilitative level to create “reflective practitioners” who owned the actions of change.
- ORID can be used in many different venues- both at the coaching level and also at the evaluation level
- O- Objective questions are used to set the tone, to invite the individual into a focused conversation. Who? What? When? Where? How?
- R- Reflective questions are used as stepping stones to identify the desired outcome, the ideal state with the current reality. This type of question typically asks what individuals think or feel about something. “What did you think about…? What had you hoped to…..? How did you feel about…?
- I- Interpretive questions ask the person to reflect, taking the thinking to a deeper level where options are explored and possible next steps are identified for consideration. “What are some things you might want to consider…? What might be the result if you…? Your goal as a coach is to elicit possible solutions, options, and opportunities.
- D- Decisional questions lead to a shift in the other person’s thinking and/or actions. “Now what” are you going to do? Decisional questions should lead to specific actions to get to the outcome determined. Questions might include, “What is your plan…? What will be the next steps you take? What supports/resources will you need?
- YOU KNOW YOU ARE GETTING BETTER IN THE USE OF ORID PROCESS WHEN YOU ARE FOCUSING ON QUALITY QUESTIONS, PARAPHRASING, CLARIFYING, PROBING, RATHER THAN PRESENTING, DIRECTING, OR “GIVING THE ANSWERS”.

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<thead>
<tr>
<th><strong>Objective Questions</strong> (They invite sharing, and they build consciousness. They generate options and possibilities. Brainstorming and identification of possible solutions is the norm)</th>
<th><strong>Reflective Questions</strong> (They elicit emotional response and personal reactions. They invite a deepened level of participation. Think, feel, believe, gauge)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What?</strong></td>
<td><strong>Then What?</strong></td>
</tr>
<tr>
<td><strong>Interpretive Questions</strong> (They invite sharing, and they build consciousness. They generate options and possibilities)</td>
<td><strong>Decisional Questions</strong> (They develop opinions/options/solutions that lead to future actions. They clarify expectations for improvement or change)</td>
</tr>
<tr>
<td><strong>So What?</strong></td>
<td><strong>Now What?</strong></td>
</tr>
</tbody>
</table>
Coaching and Conferencing with SAM/Principal Teams

Sample Questions

<table>
<thead>
<tr>
<th>Objective Questions</th>
<th>Reflective Questions</th>
</tr>
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<tr>
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<td>They elicit emotional response and personal reactions. They invite a deepened level of participation. Think, feel, believe, gauge.</td>
</tr>
</tbody>
</table>

**What?**

- What time of the day do you have your daily meeting?
- What do you do if something comes up and you are not able to meet at that time?
- What do you do during your daily meetings?
- What has your principal done to relinquish his/her management tasks? What do they need to let go of? (SAM)
- What management duties have you relinquished to your SAM or to someone else? What do you need to let go of? (Principal)
- What could your principal do to better support you in your position as a SAM (SAM)

**Then What?**

- How do you feel it is going?
- What has been the most/east successful thing that happened since my last visit?
- What seems to really work (or not work)? (SAM)
- What concerns you? Confuses you? Annoys you? (Principal)
- As you look at the data, what concerns/pleases you (Principal)
- As you look at your month-to-month growth data, what are you most pleased with? Most frustrated by? (Principal)

**Interpretive Questions** (They invite sharing, and they build consciousness. They generate options and possibilities)

<table>
<thead>
<tr>
<th>So What?</th>
<th>Decisional Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>They invite sharing, and they build consciousness. They generate options and possibilities. Brainstorming and identification of possible solutions is the norm.</td>
<td>They develop opinions/options/solutions that lead to future actions. They clarify expectations for improvement or change.</td>
</tr>
</tbody>
</table>

- What are you learning about yourself through this experience? (SAM/Principal)
- What things could you have done/could you do to increase your principal’s instructional time? (SAM)
- What things could you have done/could you do to increase your instructional time? (Principal)
- Which area(s) within instruction would you most like to work on improving? How can your SAM assist you in this goal?
- What are things that you might have done/could do in

**Now What?**

- What things will you differently between now and when I return next month?
- What things will you do to increase your instructional time in your goal areas? (Principal)
- What can you do during this next month to contribute to your principal’s future success? (SAM)
- What are your net steps? What actions/ideas has this triggered for you?
- What are you going to do to ensure that the two of you

---
the next month to find ways to provide meaningful feedback to your teachers? (Principal)  
<table>
<thead>
<tr>
<th>Key Areas</th>
<th>Notes/Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Type of Coaching Conversation</td>
<td></td>
</tr>
<tr>
<td>• Directive/ Instructional</td>
<td></td>
</tr>
<tr>
<td>• Collaborative</td>
<td></td>
</tr>
<tr>
<td>• Facilitative/ Supportive</td>
<td></td>
</tr>
<tr>
<td>• Purpose of the Coaching Conversation</td>
<td></td>
</tr>
<tr>
<td>• <strong>Objective Questions</strong></td>
<td></td>
</tr>
<tr>
<td>• The “what”</td>
<td></td>
</tr>
<tr>
<td>• Invitation to the conversation</td>
<td></td>
</tr>
<tr>
<td>• <strong>Reflective Questions</strong></td>
<td></td>
</tr>
<tr>
<td>• The “what about the what”</td>
<td></td>
</tr>
<tr>
<td>• Emotional</td>
<td></td>
</tr>
<tr>
<td>• <strong>Interpretive Questions</strong></td>
<td></td>
</tr>
<tr>
<td>• The “so what”</td>
<td></td>
</tr>
<tr>
<td>• Brainstorming</td>
<td></td>
</tr>
<tr>
<td>• <strong>Decisional Questions</strong></td>
<td></td>
</tr>
<tr>
<td>• The “now what”</td>
<td></td>
</tr>
<tr>
<td>• Identifies specifics “next steps” to be taken</td>
<td></td>
</tr>
<tr>
<td>• <strong>Based on the Decision, what are your responsibilities as the SAM?</strong></td>
<td></td>
</tr>
<tr>
<td>What are your principal’s responsibilities?</td>
<td></td>
</tr>
</tbody>
</table>
Reflection on the Coaching Conversation

Name: 
Date: 

Reflect on the coaching conversation you completed with the SAM and/or principal!

What impact did planning for the conversation, including the development of the ORID questions, have on the coaching conference itself?

What was most challenging for you during the conversation? Most pleasing?

What might be some things you would do differently/the same in your next conversation?

What techniques will you specifically address in your next coaching conversation?
FAB 5 Areas of Delegation

Successful school instructional leaders are ones in which SAMS or someone else/others handle the majority of first-line issues in the following areas:

1) Student discipline

2) Student supervision in non-instructional areas

3) Management of non-teaching staff

4) Management of school facilities

5) Interactions with parents (non-instructional issues)
SAMs Transition Template: Moving from Model 1 to Model 3

<table>
<thead>
<tr>
<th>SAM:</th>
<th>Who (other than the principal?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Track Manager</td>
<td></td>
</tr>
<tr>
<td>Daily Meetings</td>
<td></td>
</tr>
</tbody>
</table>

SAM's Job Description Duties

1.

2.

3.

4.

5.

6.

7.

8.

OTHER:
• Coaching new teams
  o Information for new coaches
  o Sample baseline data collection report
  o Site visit report form
  o Collaborative log (alternate form)
  o Time Track “look fors” & ??
Guidance for the New Coach

Congratulations! You will find the work of a Time Change Coach to be both challenging and meaningful. You will have the opportunity to influence some of the hardest working people in education – principals and School Administrative managers – and make a positive impact on the school, as well. This section contains some steps that you can take to become an effective Time Change Coach.

BEFORE YOU BEGIN COACHING:

- Log on to the SAMs Project website and explore. On samsconnect.com, you’ll have access to articles and news reports on the use of SAMs, on time management, successful teams, and school organization. Be sure to read Big Rocks. This website is often updated with new information. You can also read the monthly e-newsletters, which will give you a great deal of information about the history of this project and how it continues to progress. All the tools that you need for coaching are also available to you on this website.

- Download the Time Track software program from the website. Try using it as you own calendar, at least for a while. Learn how to enter and code events, and then play around with the graphs and text reports. It is really important for you to understand and master the use of Time Track, as you’ll be expected to answer questions from SAMs as they use the program and provide data to the principal from these reports.

- Familiarize yourself with the schools and the districts in which you will be working. You can access their websites, where you will gain a wealth of information as you begin to work with the teams. It is always helpful to understand the size, demographics, challenges, successes, and culture of the school setting.

- Determine the most effective means to set your coaching schedule. Many coaches do this by email, sending out possible dates and times to the SAMs. The SAMs can then check calendars and respond. Other coaches make phone calls or set up the next appointment before they leave.

FIRST COACHING SESSION:
• Prepare for your first meeting considering some critical questions. Among them may be:
  ~ What do you want them to know about you?
  ~ What do you need to know about them?
  ~ How can you develop a personal connection?
  ~ How does the school currently operate?
  ~ Who are the keys players?
  ~ What does the principal want to gain from this experience?
  ~ What questions or concerns do they have?

• If the school has already been participating in the project, and you are taking over the coaching, here are some additional considerations:
  ~ How long have they been in the project?
  ~ What was their baseline data?
  ~ What level of success have they had?
  ~ Are they currently using Time Track regularly?
  ~ Are they having daily meetings?
  ~ What questions or concerns do they have?

• Review the Goals and Guidelines form that outlines the responsibilities of all participants. This will clear up any confusion or concerns, such as issues such as confidentiality. It will also dispel some of their apprehensions about the changes you may suggest. This discussion will give everyone a clear understanding of the project, and their roles in the process. Have each participant sign. Make a copy for the school, and keep the original in your file.

• Review the baseline data collection report (for new teams) and/or annual data collection report (for continuing teams. Ask some questions about what the data shows, and discuss. New teams are often surprised and disappointed to see that the instructional percentage is lower than expected. Remind them that what they do now to improve is what is really important.

• Talk about daily meetings. There are videos available that will help new teams visualize what this meeting might look like. Ask the principal and SAM to select a time of day and place to meet, and encourage them to make a commitment.

• The goal of this first session is to establish a good working relationship between you, the principal and SAM, as well as setting a structure for success.

ONGOING COACHING SESSIONS:
• Try to follow the Site Visit Protocol by meeting first with the SAM privately, then with the principal privately. Observe a daily meeting, and then conclude with some pertinent questions and suggestions.
• Ask the principal to set a goal for each month. This goal will be entered into Time Track by the SAM, and will show up on the Monthly % Time on Instruction report as a green line.
• Elicit a commitment to a tangible, attainable goal to work towards for the next meeting.
• Continue to assist the SAM with coding and with Time Track.
• Demonstrate how the Time Track data can reinforce and encourage the principal as changes are made.
• Review the “Fab Five” areas of delegation, and use tools to assist the teams in delegating those management tasks to others on staff.
• Understand that teams progress at different rates. Some embrace this concept quickly, and others struggle with the difficulty of the changes. It may require patience on your part, as well as persistent questioning strategies. Change is difficult, and it takes time.
• Keep a record sheet for each visit. Review it as you plan for your next visit.
• Follow through with any requests for assistance or information.
• Hone your questioning skills, using the tools that are available, such as the “Look For” list and the ORID questioning format.

SPECIAL CONSIDERATIONS FOR NEW TEAMS:
• Baseline data collection report can be especially difficult for teams. Reassure them that it is a starting point, and that what matters is what the principal does now.
• Be prepared for an adjustment period for the staff. As the principal begins to delegate more duties to the SAM, some staff members may struggle. You will need to be prepared to discuss this and talk about ways to handle it.
• When you get near the one year mark, prepare the teams for their first annual data collection. Ask them not to make any artificial changes, and continue to follow their normal routine.
Sample Baseline Data Report

<table>
<thead>
<tr>
<th>Alternative School Administration Study (ASAS) Task Time Analysis</th>
<th>9/07 Sample 1 (Elementary School)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Management Block/Instruction Block</strong></td>
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<tr>
<td><strong>Core</strong></td>
<td><strong>Count</strong></td>
</tr>
<tr>
<td>Student Supervision</td>
<td>1A</td>
</tr>
<tr>
<td>Student Discipline</td>
<td>1B</td>
</tr>
<tr>
<td>Employees Supervision</td>
<td>1C</td>
</tr>
<tr>
<td>Employee Discipline</td>
<td>1D</td>
</tr>
<tr>
<td>Office Work Prep</td>
<td>1E</td>
</tr>
<tr>
<td>Building management</td>
<td>1F</td>
</tr>
<tr>
<td>Parents / Guardians</td>
<td>1G</td>
</tr>
<tr>
<td>Isolation Meeting Committee, groups, meetings</td>
<td>1H</td>
</tr>
<tr>
<td>District meetings, Supervisors</td>
<td>1I</td>
</tr>
<tr>
<td>External: Officials, others</td>
<td>1J</td>
</tr>
<tr>
<td>Celebration</td>
<td>1K</td>
</tr>
<tr>
<td>Student Supervision</td>
<td>2A</td>
</tr>
<tr>
<td>Work with students</td>
<td>2B</td>
</tr>
<tr>
<td>Employees Supervision</td>
<td>2C</td>
</tr>
<tr>
<td>Office Work Prep</td>
<td>2D</td>
</tr>
<tr>
<td>Observation, walk through</td>
<td>2E</td>
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<tr>
<td>Feedback to teacher</td>
<td>2F</td>
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<tr>
<td>Parents / guardians</td>
<td>2G</td>
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<tr>
<td>Isolation Meeting Committee, groups, meetings</td>
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<tr>
<td>External: Officials, others</td>
<td>2J</td>
</tr>
<tr>
<td>Teaching / Modeling</td>
<td>2K</td>
</tr>
<tr>
<td>Professional Development</td>
<td>2L</td>
</tr>
<tr>
<td>Planning, Curriculum, assessment</td>
<td>2M</td>
</tr>
<tr>
<td>Celebration</td>
<td>2N</td>
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<tr>
<td>Personal</td>
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<tr>
<th>Hours in School</th>
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<td>Management</td>
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<td>6.42</td>
<td>37.1%</td>
<td>6.62</td>
<td>37.3%</td>
<td>6.97</td>
<td>50.6%</td>
<td>5.42</td>
<td>31.8%</td>
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<td>Non Instruction</td>
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<td>32.4%</td>
<td>2.75</td>
<td>28.9%</td>
<td>2.69</td>
<td>26.1%</td>
<td>3.42</td>
<td>41.4%</td>
<td>3.00</td>
<td>34.3%</td>
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<td>Instruction</td>
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<td>2.6%</td>
<td>0.39</td>
<td>3.0%</td>
<td>0.25</td>
<td>2.6%</td>
<td>0.17</td>
<td>2.0%</td>
<td>0.33</td>
<td>3.6%</td>
</tr>
<tr>
<td></td>
<td>0.25</td>
<td>6.8%</td>
<td>6.7%</td>
<td>71.1%</td>
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<td>32.4%</td>
<td>2.75</td>
<td>28.9%</td>
<td>2.69</td>
<td>26.1%</td>
<td>3.42</td>
<td>41.4%</td>
<td>3.00</td>
<td>34.3%</td>
</tr>
</tbody>
</table>
Site Visit Report Form

Date: ________________ School: ____________________________

Principal: ________________ SAM: __________________________

Amount of time at school site: ____________________________

Baseline ______ %  Last visit ____ % this visit______ % Goal______ %

Comments:

Met with SAM  Yes  No  Comments:

Met with Principal  Yes  No  Comments:

Observed daily meeting  Yes  No  Comments:

Resources requested or suggested?  Other
Comments:
Time Change Coach: ________________

<table>
<thead>
<tr>
<th>COLLABORATIVE LOG/Coaching Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Coachee/Team:</td>
</tr>
<tr>
<td>Date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>~What's Working?</th>
<th>Current Focus, Challenges, Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coachee's Next Steps</td>
<td>Coach's Next Steps</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Next Meeting Agenda</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Next Meeting Date and Time</td>
</tr>
</tbody>
</table>
TimeTrack look-fors and questions
(Possible questions for use during site visits with SAMS and/or principals)
I like to visit with SAM/principal together and also to meet with each individually. Questions for each can be asked in joint meetings or in individual meetings.
Carol Lensing

SAM: Look Fors
- Documentation of daily meetings
- SAM’s calendar/schedule
- SAM’s interactions with staff throughout the building
- SAM’s relationship with the principal
- Graphs are regularly printed and reviewed and analyzed with principal

SAM: Questions to consider asking
- What is the biggest challenge you are facing in your position as a SAM?
- How does your principal respond to your suggestions/challenges?
- What is the best part of the job?
- What has the principal done to relinquish his/her management tasks? What do they need to let go of?
- What could your principal do to better support you in your position?
- How does your principal respond to your review of data daily and monthly, especially in those times when there is not a lot of growth?

Principal: Looks Fors
- Principal makes sure that time is allotted and occurs each day for meeting with the SAM
- Principal regularly reviews his/her graphs using the TimeTrack tools and understands how to make the necessary changes
- Principal’s daily and weekly schedule
- Principal’s interactions with staff throughout the building
- Principal’s relationship with the SAM

Principal: Questions to consider asking
• When I review your baseline data, I notice that you had 0% of time that you spent on “feedback to teachers” (or whatever their lowest area was). Specifically what have you done to ensure that you are providing meaningful feedback to teachers after you have been in their classroom? How can your SAM assist you in this goal?
• Which area within the area of instruction would you most like to work on improving? What can your SAM or I do to help you accomplish that goal?
• Which area of management has it been most difficult to turn over to your SAM?
• How are your parents responding to the change in how things operate at your school? What do they see in how you function differently as the principal now that you have a SAM?
• How realistic is the goal you have set for yourself in terms of % instructional time to achieve in the first year? How do your monthly goals assist you in reaching that goal?
• As you look at your month-to-month growth data, what are you most pleased with? What are you most frustrated by?
• Coaching teams (Beyond 1 year)

  o Needs/conditions of teams after the first year

  o Coach’s role in reviewing annual data

  o Reviewing annual data-samples, guidance for reviewing data

  o Reduced data collection rubric
Needs/Conditions of Teams after the 1st Year

Relationship between principal and SAM

- Trust is strong if the team has been successful
- SAM should be continually asking reflective questions of their principal
- Should be facilitating and insisting on the daily meeting
- If team is strong, SAM has been able to establish themselves as an important part of the administrative team and the principal has ensured that the SAM is seen as an important part of the staff in general
- SAM may be unsure of how hard he/she can push the principal into more instructional areas
- There should be evidence in the building of a shift in culture and at least the beginnings of a chance in practices to those focused specifically on instruction.
- The one year mark is a good time to assess with the principal and SAM whether the SA has been given/assumed too much responsibility or too little

Coaching support for year old teams

- Use the annual data to direct the conversation/questions
- Focus your questions on instructional practices
- If there are still software issues focus your work on those issues when you meet individually with the SAM
- Determine if there has been any change in practice- if not, focus your questions on why that has not happened
• Celebrate the growth of the team over the first year
• Begin to provide professional development and/or access to appropriate professional development

Coach’s Role in Reviewing Annual Data

Your principal and SAM have been in the project for one year and the principal has just had their annual shadowing completed. Your team has moved to a new level!

- Schedule a time to meet with the SAM and the principal to review the annual data. You, the principal, and the SAM should receive the data electronically approximately 10 days after the week-long data collection has been completed.
- Prior to meeting with the principal to review the data, review the baseline and one year comparison chart that is included in the data- look at the instructional descriptors in a comparative manner and be prepared to ask reflective questions of the principal based on your analysis (see next page for sample one year data report).
- At the meeting discuss the instructional % and how it compares to the baseline. The % of instruction in and of itself, does not tell the whole story. The most important point to make is not about how the number has gotten higher (hopefully) but rather how are they spending the time on instruction
- Review the management descriptors and discuss how effective the principal has been in giving up many of the management duties, especially those designated as the five high delegation areas from the PSA study (student behavior, non-instructional student supervision, overseeing classified staff, building management, and interactions with parents on non-instructional issues)
- Ask questions of the principal that revolve around the descriptors and how they are spending their time instructionally. Use the ORID questioning strategies starting with objective type of questions but moving to more reflective, interpretive, and decisional types of questions. Remember that
this is intended to be a reflective thought process for the principal and that there are no right or wrong numbers that they should see on their result sheet. In the end the questions and process need to center on which descriptors and behaviors of the principal will have the greatest impact on student learning.

- Be sure to compare the data collectors’ official annual report with the SAM’s documentation of the same week on the Time Track software. Ask reflective questions about major differences between what the SAM has coded and how the data collector recorded the shadowing information. During the first year a lot of emphasis is placed on careful coding and use of the Time Track software. When the first annual data is received is the first actual time to do a comprehensive check on the accuracy of the SAM and principal documentation in Time Track. Take advantage of this meeting to review it carefully.

- Talk to the principal and SAM about setting new goals for the upcoming year—which descriptors does the principal want to focus on, how can the SAM help make that happen, how can they code more closely (if there are apparent differences between the annual data and the SAM’s Time Track data), and what is the status and the goals regarding the management descriptors. Ask reflective questions about who could become the first responders in the five high delegation areas.

- Discuss next strategies/supports that the principal and/or SAM needs or wants to move to the next level with project implementation.
**TCC Practice Reviewing Data- Questions you can use during the data review with the Principal/SAM team**

**O (objective):**
What do you notice?
What are you seeing?
Is this what you expected?
What stands out?
Tell me about the week. What was unusual?

Who are your 1st responders?
Have you discussed this data in your daily meeting?
Review your goals from a year ago. How does this data reflect your goals?
Who is doing your PD, and what effect is it having on your staff?
What happened to change your student work and supervision data?

**R (Reflective):**
What do you believe attributed to the decrease in instruction?
How would you reflect on employee and student supervision (management)
What have you determined from the data?
Looking at increase in meetings- what is the purpose of these meetings? Could someone else attend these?
Was there anything out of the ordinary during data collection week?
Do you think the time spent on teaching and modeling improved student achievement and what would use as evidence of that?
What have you done differently this year?
When and how are you communicating feedback to teachers?

**I (Interpretive):**
What do you want to accomplish? Goals?
What changes have you made in delegation?
What are the three “big rocks”?
Compare the data to timetrack data the SAM collected
How do you plan to increase your instructional time?
Looking at your data, what could you have done differently to increase instructional time and meet your goal?

D (Decisional):
What is your next step?
How will you increase your time on instruction and what will be your focus?
After reviewing your data today, what steps will you take to become a better instructional leader?
What are you going to do to ensure that you will increase time for observation and feedback and decrease amount of time attending/facilitating meetings?

• Coaching strategies
  o Coaching
    ▪ Blended coaching strategies & sentence stems
    ▪ Quotes about coaching
    ▪ Mike Rutherford 7 tools
    ▪ Comparing strategies- Instructional and facilitative
    ▪ The importance of listening
  o Instruction
    ▪ Teaching and learning
    ▪ Art and Science of teaching- Marzano
    ▪ District sample- Informal classroom observation/feedback templates
    ▪ Leadership letter- Dick Best (NYCLA)
  o Delegation
    ▪ Worksheet categorizing principal tasks
    ▪ First responder self-assessment
    ▪ Delegation pyramid
    ▪ Information: what to delegate
Leadership

- Summary of Balanced Leadership: Marzano
- Dale Carnegie Principles of Effective Leaders

Blended Coaching—Gary Bloom

Support new and veteran principals through coaching-based professional development! Research shows conclusively that principals and other school leaders are essential to school improvement, and that these individuals benefit from the intensive, contextualized support that a coach or mentor can provide. But how does a coach support a school leader in mastering the professional and emotional challenges of school leadership for a meaningful and positive impact on students?

This book, grounded in research and theory, provides readers with practical skills and strategies for leadership coaching explicitly tied to the needs of principals and other school leaders. It makes sense of the often contradictory literature on coaching by promoting a new approach, that of "Blended Coaching." This model-based on more than 15 years of fieldwork at the renowned New Teacher Center, University of California, Santa Cruz-recognizes that effective coaches move between facilitative and instructional approaches in their practice, and has made a meaningful difference in many school districts nationwide. Designed for individuals and institutions charged with improving principal retention, teacher satisfaction, and student achievement, this indispensable resource features:

- Real-life examples to enforce key concepts
- Reflective prompts to enhance assimilation
- Insightful exercises for coaches, principals, and colleagues

Comprehensive resources, including worksheets, sample forms, and assessments

Blended Coaching Strategies
Instructional.................................................................Facilitative
An effective coach assesses the needs of his/her coaches and draws upon a variety of blended strategies in the course of the coaching process and often in the course of any one coaching session. We group coaching strategies into two broad categories: Instructional and Facilitative.

**Instructional Coaching** tends to focus on ways of doing: How should I organize my staff meeting? How should I present this test data to my staff? In instructional mode, the coach draws upon a variety of more didactic teaching strategies including showing and telling. A coach may give direct feedback: make judgments and suggestions as appropriate. Instructional coaching draws upon a variety of traditional teaching strategies (modeling, direct instruction, providing resources), and is typically embedded in facilitative conversations.

Basic moves of Instructional Coaching:
- The coach takes the lead in the coaching conversation
- The coach may offer personal thoughts and experiences to support and motivate the coachee.
- The coach models, advises, prescribes action steps and provides resources.

Whenever the coach takes time to give information about knowledge or skills, he/she has moved instructional coaching. A coach can move briefly into instructional coaching by using sentence stems such as:
- One thing I’ve learned/noticed is…
- A couple of things to keep in mind…
- Some principals have tried… and it might work for you.
- Sometime it’s helpful if…..

Concepts and information about “best practices” in leadership can be embedded in a question such as:
- How do you make time to visit all classrooms?
- How do you ensure all voices are heard in your staff meetings?
- What data analysis tool will you provide to the group before the decision is made?

**Facilitative Coaching** strategies aim to build internalized learning: changes not only in what the coachee does but in the coachee’s way of being in the world including how he/she thinks and feels. I’m not sure if I can make it in this job. I’m just too buried to be an instructional leader. It is the goal of facilitative coaching to build reflective practitioners who have the internal and external resources to maintain personal and professional growth. The facilitative coach is non-judgmental: his/her role
is to lead the coachee in examining his own assessments rather than to make and share the coach’s assessment with the coachee. Basic moves of facilitative coaching:

- Paraphrase
- Ask clarifying questions
- Assist coachee in gathering and interpreting data
- Use hypothetical and meditational questions
- Give feedback
- Assist coachee in synthesizing new learning
- Assist coachee in articulating plans for new actions

Some Blended Coaching Stems

Paraphrasing
- So.....
- Let me make sure I understand...
- In other words....it sounds like....

Clarifying
- Could you tell me more about....
- Tell me what you mean by,...
- Could you give me an example....
- How is that different from....

Interpretation
- What you are describing could mean....
- Could it be that what you are saying is...
- Is it possible that...

Mediational
- What criteria do you use to...
- What might happen if....
- How would it look....
- What is the impact of...on students...
- How do you decide....

Instructional
- Would you like more information: to review some options: some resources....
- A couple of things to keep in mind are....
- Research seems to indicate....
- Sometimes it is helpful if...

Summarizing
• You have stated that your goal is...
• Let’s review the key points in our discussion...
• Tell me your next steps...
• So this is your homework...

Transformational
• Let’s try a role-play....
• Could you help me understand the assessment...could you make a different assessment?
• How could we turn that rut story into a river story...
• What new “way of being” are you willing to try out...

Coaching Quotes

Feedback is like oxygen- we all need the right amount individually.

Cailean Macleod

The coach’s main role deals with expanding the ability to see contexts, rather than supplying content. The person being coached then sees new ways to utilize existing skills.

Julio Olalla

A coach is someone who tells you what you don’t want to hear so that you can see what you don’t want to see so that you can be what you’ve always wanted to be.

Tom Landry

What coaching does is to expand the space of possibilities that someone is- an expansion that requires an external intervention (coaching) to take place. Coaching allows the coachee to observe oneself as a self, to acknowledge the narrowness and limitations of that self, and to expand that self beyond its boundaries, beyond the horizon of possibilities available to the coachee’s own intervention.

Rafael Echeverria
Masterful coaches inspire people by helping them recognize the previously unseen possibilities that lay embedded in their existing circumstances.  

Robert Hargrove

Comparing Coaching Strategies

Instructional coaching primarily addressed ways of doing while facilitative coaching addresses ways of being. Facilitative coaching supports the development of knowledge and skills while facilitative coaching supports the development of dispositions and internal capacity. Each uses the basic coaching skills of:

- Building trust and rapport
- Listening
- Observing
- Questioning
- Providing feedback
- Summarizing and committing to next steps

And basic moves such as:

- Analyzing the knowledge and skills required to complete a task
- Getting permission to instruct
- Sharing examples, models, resources, methods and information
- Paraphrasing, clarifying, asking meditational questions
- Guiding reflection upon feedback
• Examining assertions and assessment
• Developing problem solving skills
• Shifting the locus of control to the coachee

A skillful coach orchestrates a fluid, blended, reiterative process

**Listening - Why is this coaching skill so important?**

1. To gain clarity about an issue

2. To understand the needs and perceptions of the coachee

3. To gather data for feedback to the coachee

4. To allow the coachee to refine his/her thinking and perception by speaking to an attentive listener

5. To seek patterns of behavior

6. To lay a path for building responses and solutions

**Barriers to Effective Listening**

• Internal distractions such as daydreaming, mental tangents, rebuttals

• Emotional reactions
- Biases and judgments
- Semantic misunderstandings
- External distractions such as interruptions, time pressures, multi-tasking
- Physical barriers such as time of day, fatigue, low energy

---

**Mike Rutherford- Seven Tools**  
**Summary created by Pat Marshall- October 2009**

<table>
<thead>
<tr>
<th>Tool</th>
<th>When to use</th>
<th>When not to use</th>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Second Feedback</td>
<td>- Face-to-face specific feedback. Creates a need for a common vocabulary.</td>
<td>- When trying to repair something that is wrong.</td>
<td>Good to share language and thoughts on planning and reflection.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Can introduce LCS verbage with further study at a later time-this leads to one of the coaching models.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This helps teachers develop new strategies and ideas for same topic.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Gathers lists of ideas and provides congruency of teaching.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This type of planning should be 2-4 days away from actual teaching.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Steps 2-4 must be done in that order for congruency but not necessarily done in one day.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Established learning goals lead to high-powered good assessments.</td>
</tr>
<tr>
<td>5 Minute Feedback</td>
<td>- Face-to-face quick, specific feedback.</td>
<td></td>
<td>Talk must be 50/50.</td>
</tr>
<tr>
<td>Reflective Planning/coaching</td>
<td>- Look for patterns to increase common language.</td>
<td></td>
<td>Observe practices and work to develop.</td>
</tr>
<tr>
<td>Positive Reinforcement</td>
<td>- Works with teachers who teach the same topic at the same time.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Works well with common planning groups.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Gives feedback for further growth.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coaching</td>
<td>Instructional Conferencing</td>
<td>Small Group Coaching</td>
<td>Teaching Studies</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------</td>
<td>----------------------</td>
<td>------------------</td>
</tr>
</tbody>
</table>
| • Builds instructional leadership skills and culture builder | • Assist to change practice  
• Coach’s job is to make teacher successful  
• Can be used to determine employment  
• 2 purposes: fix something or add something | • Work with group to give more information  
• Creates collegial conversation and supports lesson planning | • Assists teachers looking at other teachers practice and making connections to content  
• Creates an understanding for common language and strategies  
• Group observation with common experiences and then common conversation |
| • Works best with high flyers | • Do not mix this tool with trying to fix problems | • | • NOT evaluation, critique, or judgment |
|                                |                           |                      | one practice to a higher degree  
Intense work and time consuming  
Use in-and out-of-class examples  
Do not ask teacher to share strategy during the feedback section |  
Follow 1-3 in order to set pattern for this type of coaching  
Observe several times and look for trends to do step- diagnosis  
Step 4 is formal observation followed by feedback (step 5 and 6) which can happen on another day after observation |
|                                |                           |                      | Works best if conducted in somewhere outside of classroom  
Generally 3-5 people  
Use Reflective Planning or Instructional Coaching steps  
Try to use both memory types: Taxon (lists of things/categories) and Locale (where was body during experience and thought placed in brain)  
Group teachers looking at teacher for LCS principle  
No notes are taken during this event  
15 minute observation  
Feedback does not start until observed teacher arrives  
Generally 5-10 persons  
Teachers do not need to be in same content, grade  
Steps are orientation, observation, Q and A of observed teacher, what transfers to my classroom |
### INSTRUCTION

#### Teaching and Learning

<table>
<thead>
<tr>
<th>20th Century Paradigm</th>
<th>21st Century Paradigm</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Characteristics of Traditional Instruction</strong></td>
<td><strong>Characteristics of Effective Instruction (Iowa Core Curriculum)</strong></td>
</tr>
<tr>
<td><strong>Teacher-Centered Classrooms</strong></td>
<td><strong>Student-Centered Classrooms enabled by technology:</strong></td>
</tr>
<tr>
<td>• Factory-model education with one size fits all instructional approaches</td>
<td>• Students construct knowledge/experiences</td>
</tr>
<tr>
<td>• Sitting, listening and note-taking</td>
<td>• Connected to student experiences/interests</td>
</tr>
<tr>
<td>• Teacher centered- top down, sage on the stage, teachers controlled lessons</td>
<td>• Students communicate their understanding/reasoning/connections</td>
</tr>
<tr>
<td>• Students working alone</td>
<td>• Create their own collaborative learning communities</td>
</tr>
<tr>
<td>• Order through discipline</td>
<td>• Performance-based in real world context</td>
</tr>
</tbody>
</table>

#### Teaching for Recall

- Drill and kill
- Making learning a short-term low engagement activity
- Lower levels of Blooms taxonomy
- Little connection to prior knowledge
- Emphasis on memorization and

#### Teaching for Understanding assisted by technology:

- Leads kids to explain, find evidence, generalize, connect and apply
- Connections to prior knowledge
- Attain deep procedural and conceptual knowledge
recall of facts
• Compartmentalized
• Little or no teaching for transfer
• Infrequent, factual assessment

Summative Assessment Focus
• No formative assessment
• Tests are factual knowledge
• Only one way to assess
• Assessment data is not used to adjust teaching or instruction

Text Book Based Curriculum
• Boring and irrelevant to student lives
• Low bar, not authentic
• Low expectations for students based on their challenges
• Non-project based learning
• Little chance for application of skills
• No transition to real world
• Repetitive or routine

Factory Model
• Creating tracks
• Minimizing variability
• Predominately whole group
• Teaching to the middle
• All kids doing the same thing at the same time
• Culture of anonymity

• Long term/thinking centered
• Powerful representation
• Inducts students into the discipline
• Developmentally appropriate
• Teach for transfer

Assessment for Learning through technology:
• Inform/adjust instruction
• Planned/ongoing
• Clear conceptual targets/criteria for success
• Used by teachers and students for differentiation and self monitoring
• Regular descriptive feedback

Rigorous and Relevant Curriculum integrated with technology:
• Complex, provocative opportunities for authentic work
• Personally or emotionally challenging: builds connections between content and students’ lives
• Challenging content
• Authentic work and the application of knowledge and skills to solve complex problems
• Original application of skills to complex problems
• Requires analysis and synthesis for authentic product

Teaching for Learner Differences powered by technology:
• Access to the general education curriculum for all students
• Teacher uses assessment data to make sound instructional decisions to meet the needs of individual students
• Teacher uses a variety of methods to teach the desired concepts and skills
The Art and Science of Teaching- Robert Marzano

Key: Supporting and supervising effective teachers in every classroom

Walkthrough, Observe, and provide feedback on specific parts of a lesson
- Routine segments—learning goals and feedback, rules and procedures
- Content-specific segments--- Interacting with new knowledge, practicing and deepening knowledge, generating and testing hypotheses
- Segments enacted on the spot--- student engagement, adherence to rules and procedures, teacher/student relationships, high expectations

What do you look for as routine components of every lesson?
1. Reviewing important rules and procedures
2. Reviewing learning goals
3. Reviewing student progress
4. Celebrating success

If the content segment involves new knowledge what should you expect to see?
1. Previewing activities
2. Info presented in small chunks
3. Students processing each chunk in small groups
4. Students summarizing and taking notes after content has been
introduced
5. Students reflecting on their learning

If the segment involves knowledge practice and deepening activities what do you expect to see?
1. Brief review of content
2. Activities involving similarities and differences
3. Activities involving identification of errors in thinking
4. Activities involving massed and distributed practice
5. Homework possibly used as an extension of these activities

If the segment involves hypothesis generating and testing tasks what do you expect to see?
1. Brief review of content
2. Students working individually or in groups on long term tasks
3. Teacher acting as facilitator and resource provider

What do you look for regarding segments that must be enacted on the spot?
1. Engagement activities when student lose focus
2. Acknowledgement of rules and procedures being followed or not being followed
3. Behaviors that forge positive relationships with students
4. Attention to behaviors that communicate high expectations for all students

SAMPLE DISTRICT- INFORMAL CLASSROOM OBSERVATIONS
<table>
<thead>
<tr>
<th>Component</th>
<th>Grade Levels</th>
<th>Subject/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The classroom environment conveys a positive and supportive atmosphere. The teacher consistently models appropriate behavior and sets clear expectations for student conduct.Classroom management strategies are in place and implemented effectively.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The teacher's interactions are mature and appropriate for the students' ages. The teacher is consistent in their expectations and acknowledges student progress.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Behavior</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student behavior is consistent with age-appropriate expectations. Students are engaged and demonstrate respect for peers and adults. The teacher effectively guides students during transitions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instruction and Curriculum</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The instruction is developmentally appropriate for the students. The curriculum is well-planned and includes a variety of activities. Materials and resources are effectively utilized.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classroom Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classroom management strategies are clearly communicated and consistently enforced. The teacher uses positive reinforcement to manage student behavior.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The learning environment promotes a safe and inclusive atmosphere. Materials and resources are organized and accessible.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Detailed observations and evaluations are typically recorded in the form of notes or comments, which may be found in the teacher's documentation or in the student's portfolio.
<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Description of Events</th>
<th>Description of Environment</th>
<th>Description of Personal Constructs</th>
<th>Description of Actions</th>
<th>Description of Accessibility</th>
<th>Description of Personal Constructs</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/01/2023</td>
<td>Event A occurred...</td>
<td>Indoor space</td>
<td>Well-lit area</td>
<td>Active participation</td>
<td>Proper equipment available</td>
<td>Comfortable seating</td>
</tr>
<tr>
<td>10/02/2023</td>
<td>Event B occurred...</td>
<td>Outdoor area</td>
<td>Sunny day</td>
<td>Engaged in discussion</td>
<td>High-quality audio equipment</td>
<td>Adequate shade</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

Note: The table continues with similar entries for each day, detailing various events, environments, personal constructs, actions, accessibility, and personal constructs relevant to each day's activities.

**Formative Feedback**

- Teacher: [Name]
- Subject: [Subject Name]
- Date: [Date]
- School: [School Name]
Leadership Letter by Dr. Dick Best (NYC Leadership Academy)—Using Multiple Lenses to Support Exemplary Instructional Practices

What follows is a document that captures key ideas that have come out of the recent Leadership Letters focusing on instructional strategies. I have included core questions and strategies tied to each of these areas, including:

- T A P S
- Bloom’s Taxonomy
- Write to Learn and Talk to Learn
- What Drives your Instruction?
- Proximity

T A P S (Total Alone Pair Small group)

*What is the balance of your instructional design?*

How much of your lesson involves **whole group**? TOTAL
How much of your lesson involves students working **on their own**? ALONE
How much of your lesson involves students working **in groups of two**? PAIRS
How much of your lesson involves students working **in groups of 3 or 4?** SMALL.Group

While there is not a specific, ideal configuration, the focus is to achieve a some level of balance between time devoted to Whole Group, Alone, Pairs and Small Group. Of particular note, I would draw attention to the tendency in many classrooms to have a predominance of T (whole group) time. Such an emphasis on whole group instruction can limit the opportunities for students to be highly engaged and invested in the learning process.

<table>
<thead>
<tr>
<th>Whole group Limited individual engagement</th>
<th>Individual/small group High individual engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round Robin Reading</td>
<td>Buddy or partner reading</td>
</tr>
<tr>
<td>Whole group discussion with one person talking</td>
<td>Write pair share or turn and talk</td>
</tr>
<tr>
<td>Students waiting in line to perform</td>
<td>Students engaging at different sites</td>
</tr>
<tr>
<td>Single student up to the board</td>
<td>Multiple students at the board and others working at their desk</td>
</tr>
</tbody>
</table>

I would encourage you to have your teachers spending time gathering data on their own teaching, on how much of their time involves using T, A, P and S. The more that they become self-aware of their own teaching patterns, the better able they can modify and enhance their teaching. Self-awareness is essential in raising the instructional bar.
BLOOM’S Taxonomy

Are you giving students access to higher levels of thinking, to more rigorous instruction?

New Blooms Framework:
1. Remembering
2. Understanding
3. Applying
4. Analyzing
5. Evaluating
6. Creating

As you are observing or teaching, I encourage you to consider: What it the cognitive level of the following:
- Classroom discussions and activities
- Worksheets and writing assignments
- Assessments (i.e., quizzes, tests)

You might consider having your teachers develop units of instruction using a Bloom’s taxonomy framework with a tool that includes example Question Starters and Potential Activities at each of the six levels. Such a tool is useful in helping teachers to think more out of the box about raising the cognitive bar. I would recommend you look to a tool similar to the one found in Differentiated Instructional Strategies: One Size Doesn’t Fit All by Gregory and Chapman (Corwin Press, 2002). I have constructed a table designed for building such a unit that is more intentional about providing students with access to higher level thinking.

Unit Title ______________________ Teacher/Grade Level________

<table>
<thead>
<tr>
<th>Bloom Level</th>
<th>Question Starters</th>
<th>Potential Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remembering</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understanding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applying</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analyzing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creating</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WRITE To LEARN and TALK To LEARN
From the time your students arrive at school to the time that they leave at the end of the day.

How many times will they have written, reflecting on their learning?
How many times will they have talked with a classmate “thought partner”?

Writing and Talking are two of the most formidable learning tools in fostering high levels of overt engagement and learning success.

How can you enhance the frequency that students write in meaningful, thoughtful ways? How can you enhancing student opportunities to be thought partners with their classmates?

With students thoughtfully writing and talking in small group, we foster what I call OVERT ENGAGEMENT. An activity like Write and Share (students writing on a question and then sharing ideas) can serve as a great stimulus. Reversing the order, Share and Write, having students first brainstorm ideas can serve as a great stimulus to their writing. In either way having students actively participating in writing and talking can complement your students’ capacity to be actively engaged and thoughtfully invested in their learning. I strongly encourage you to use such tools in supporting learning success.

WHAT DRIVES INSTRUCTION—Coverage or Student Learning???

• As you begin your instruction, how well informed are you as to the level of student readiness to learn what is planned for the lesson? What is your evidence?
• During your instruction, at what points do you assess student learning? How well informed are you as to whether students are understanding the instruction? What is your evidence?
• As you conclude instruction, how well informed are you as to what students have learned from the lesson? Are students ready to successfully complete homework? Are students ready to move on to the new lesson? What is your evidence?

I would strongly encourage activities like Write and Share at the beginning, throughout and concluding a lesson. Such strategies maximize the opportunities for students to be thoughtfully immersed in the learning.

Furthermore, such strategies are for your teachers assessing in the moment, gathering critical data regarding student learning. With such assessment data teachers have three choices:

1. Reteach
2. Move On
3. Differentiate
PROXIMITY—Movement around the classroom

If you painted the bottom of your teachers' feet, what would the data show???

Proximity is an incredibly powerful learning tool. It is a vital complement to assessing in the moment. As students are writing and talking, teachers can move around the classroom to determine how well students are understanding and their readiness to move on.

Proximity supports your teachers in a number of very important ways, including:

- **Student Assessment**—Assessing student understanding and using that data to guide instructional decision making;
- **Remediation**—Providing some mini-reteaching to particular students who are not understanding;
- **High Expectations**—Conveying a message as to the importance of the learning activity.
- **Redirecting Students Groups**—Addressing issues with student group to ensure that they are working effectively;
- **High Expectations and Accountability**—Holding students accountable for learning and establishing a high bar of expectations;
- **Attentiveness**—Encouraging student attentiveness and focus on learning at hand;
- **Positive Connections with Students**—Building positive connections with students, affirming the efforts of specific student and student working groups;
- **Modeling the Importance of Learning**—Conveying the importance of the work and the personal investment in the learning;
- **Prevention**—Preventing potential behavioral issues from escalating.

**Final Comments**

Needless to say, I am very emphatic about the importance of these issues related to instructional success. The stakes are incredibly high regarding student success, and the role that exemplary instruction plays in determining that success is clearly compelling.

As Richard Allington notes in *What Really Matters for Struggling Readers*,

> “Recent studies have demonstrated the enormous impact of high-quality classroom instruction. In fact, these students have found that nothing was as powerful as the quality of the teacher in predicting the achievement of children. Neither parents nor socioeconomic status of the family was as powerful as good instruction in shaping the academic futures of students.” (p.142)

**What are you doing to support high quality instruction??**

Can you be doing more in how you 1. Model exemplary instruction; 2. Observe and monitor instruction; 3. Provide deep support and professional development?

I hope that you find these to be useful to you as the *Instructional Leader* and to your colleagues.
Worksheet: Categorizing Principal Tasks
Lesson 1.1 Homework
Lesson 1.2 Discussion

Directions: For each item listed below, designate those items that would be **instructional leadership** with an "I" and those that would be **management** items with an "M".

1. ___ Student supervision in the cafeteria during lunch
2. ___ Meeting with 2nd grade teachers to create common reading assessments
3. ___ Disciplining a student for running in the hall
4. ___ Discussion of being late to work with an employee
5. ___ Reviewing test scores at your computer
6. ___ Completing a work order for a maintenance item
7. ___ Giving feedback to a teacher about your classroom observation
8. ___ Participating in an IEP meeting for a student
9. ___ 5th grade teachers meeting to review a common assessment
10. ___ Meeting with the district's foodservice director
11. ___ State Fire Marshall's inspection visit
12. ___ Announcing the day's birthdays during the announcements
13. ___ Supervising a classroom until the teacher gets there
14. ___ Working with student(s) on a math project
15. ___ Discussing with a teacher how to implement the IEP after the IEP meeting
16. ___ Conducting an observation walk-through in a classroom
17. ___ Working on a new parking plan for the school parking lot
18. ___ Checking on a window repair
19. ___ Meeting with parents about their child's discipline issue
20. ___ Attending a district reading team meeting to address new textbooks
21. ___ Working with the PTO Exec Board about Patriot's day lunch
22. ___ Meeting with state officials about the upcoming state accreditation visit
23. ___ Teaching a class so that the teacher can watch a specific teaching technique
24. ___ Preparing a professional development activity for the faculty meeting
25. ___ Having lunch with the students who read the most books for the week
26. ___ Reviewing the emergency evacuation plans for the building
27. ___ Attending a school board meeting to get the school handbook approved
28. ___ Reviewing student suspension records
29. ___ Meeting with new staff members and their mentors to discuss feedback visits
30. ___ Meeting with a textbook salesperson about a new Science text
31. ___ Meeting with a student to discuss a lesson that a teacher presented
32. ___ Meeting with a substitute teacher to discuss her class schedule for the day
33. ___ Planning for the parent night open house
34. ___ Conducting an evacuation observation of a teacher
35. ___ Completing a survey on-line from your state professional organization
36. ___ Creating a power point for the next faculty meeting about the new evacuation drills

Reflect: Is there a better way to get the management tasks done—perhaps by another person? Which of the tasks in the above list have the greatest effect on student achievement, according to research?
National SAM Project

Team: _______________________________ Date ___________________

Five time-intensive management tasks: **Who is the first responder?**

<table>
<thead>
<tr>
<th>TASK</th>
<th>Never the Principal (3)</th>
<th>Rarely the Principal (2)</th>
<th>Sometimes the principal (1)</th>
<th>Usually the Principal (0)</th>
<th>Name of the designated First Responder?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student supervision, non instructional areas of the school</td>
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<tr>
<td>Student discipline, behavior management</td>
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<tr>
<td>Supervision of non-teaching school staff</td>
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<td>School facilities: maintenance, scheduling, cleaning</td>
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<tr>
<td>Interaction with parents on non-instructional matters</td>
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</tbody>
</table>

13-15 points **Best! You are right where you need to be as a SAM/Principal team.**

9-12 points **Good! You are making progress.**

0-8 points **Oh no! Rethink who is the first responder for these time-intensive management tasks.**
Delegation Pyramid

- Principal *must* do
- Principal *should* do, but someone else could do part of it
- Principal *could* do, but others could do it if given the opportunity
- Others *should* do, but principal can help in an emergency
- Others *must* do
# Information: What to Delegate

**Principal must do**
- Personnel issues
- Teacher evaluation
- Strategic decision making
- Student behavior management: suspension or expulsion

**Principal should do, but someone else could do part of it**
- Reports, special requests (if skill level is there)
- Budgeting
- Projects with a short turnaround time

**Principal could do but others could do it if given the opportunity**
- Representing school at meetings
- Facilitating part of a faculty meeting
- Functions principal dislikes (try to find someone who likes them)—this is not the same as giving people the “dirty work”

**Others should do, but principal can help in an emergency**
- Routine decision making
- Tasks that others are more qualified for than principal is
- Routine student behavior management
- Student supervision, non-instructional areas of the school*
- Student discipline, behavior management*
- Supervision of non-teaching school staff*
- School facilities: maintenance, scheduling, cleaning*
- Interaction with parents on non-instructional matters*

**Others must do**
- Assignments that add variety to routine work
- Tasks that will increase the number of people who can perform critical assignments

* Should have a designated first responder (other than the principal) for these tasks.
# Summary of Balanced Leadership

## Findings for Principals

<table>
<thead>
<tr>
<th>Factor</th>
<th>Associated Practices</th>
<th>Description: Extent to which the principal</th>
</tr>
</thead>
</table>
| 1. Knowledge of curriculum, instruction, assessment | - It is knowledgeable about curriculum and instructional practices  
- It is knowledgeable about assessment practices  
- Provides professional development for teachers regarding effective classroom practice  | Is knowledgeable about current curriculum/assessment practices  
- Creates and leads new and challenging innovations  |
| 2. Optimizer | - Empowers teachers and staff to accomplish things that might seem beyond their grasp  
- Portrays a positive attitude about the ability of teacher and staff to accomplish sustained change  
- Is a driving force behind major initiatives  | Ensures faculty and staff are aware of the most current research and practices and makes the discussion of these a regular aspect of the school’s culture  |
| 3. Intellectual stimulation | - Stays informed about current research and theory regarding effective schooling  
- Continually engages teachers and staff in discussions about current research and theory  
- Continuously involves teachers and staff in reading articles and books about effective practices  | |
| 4. Change agent | - Consciously challenges the status quo  
- Is comfortable leading change initiatives with uncertain outcomes  
- Systematically considers new and better ways of doing things  | Is willing to challenge and actually challenges the status quo  |
| 5. Monitor & evaluate | - Monitors and evaluates the effectiveness of the curriculum instruction  
- Assesses  | Monitors the effectiveness of school practices and their impact on student learning  |
| 6. Flexibility | - Is comfortable with major changes in how things are done  
- Encourages people to express opinions that may be contrary to those held by individual or positions of authority  
- Adapts leadership style to control of specific situations  
- Can be directive or non-directive as the situation warrants  | Adapts his or her leadership behavior to the needs of the current situation and is comfortable with dissent  |
| 7. Ideals & beliefs | - Holds strong professional values and beliefs about schooling, teaching, and learning  
- Shares ideas and beliefs about schools, teaching, and learning with teachers, staff, and parents  
- Demonstrates behaviors that are consistent with and behalf  | Communicates and operates from strong values and beliefs about schooling  |
| 8. Four More People Can't Get Enough of in First-Order Change in Rank Order | |  |
| 1. Culture | - Promotes cooperation among teachers and staff  
- Promotes a sense of well-being  
- Promotes cohesion among teachers and staff  
- Develops a shared vision of what the school could be like  | Fosters shared beliefs and a sense of community and cooperation  |
| 2. Communication | - Is easily accessible to teachers and staff  
- Maintains open and effective lines of communication with teachers and staff  | Establishes strong lines of communication with and among teachers and students  |
| 3. Order | - Provides and enforces clear structures, rules, and procedures for teachers, staff, and students  
- Establishes routines regarding the running of the school that teachers and staff understand and follow  | Establishes a set of standard operating procedures and routines  |
| 4. Input | - Provides opportunities for input from teachers and staff on all important decisions  
- Provides opportunities for teachers and staff to be involved in policy development  
- Involves the school leadership team in decision making  | Involves teachers in the design and implementation of important decisions and policies  |
| Ten More Responsibilities for First-Order Change | |  |
| Affirmation | - Systematically recognizes and celebrates students’ accomplishments  
- Systematically and fairly recognizes and celebrates teacher accomplishments  
- Systematically and fairly recognizes the failures of the school as a whole  | Recognizes and celebrates accomplishments and acknowledges failures  |
| Contingent Rewards | - Uses hard work and success as the basis for rewards and recognition  | Recognizing effort towards individual achievement  |
| Discipline | - Protects instructional time from interruptions  
- Protects teacher from internal and external distractions  | Protects teachers from issues and influences that would detract from their teaching time or focus  |

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<table>
<thead>
<tr>
<th>Focus</th>
<th>Establishes concrete goals for curriculum, instruction, and assessment practices within the school.</th>
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<tbody>
<tr>
<td></td>
<td>Establishes concrete goals for the general functioning of the school.</td>
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<tr>
<td></td>
<td>Establishes high, concrete goals and expectations that all students will meet.</td>
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<tr>
<td></td>
<td>Continuously keeps attention on established goals.</td>
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<td></td>
<td>Establishes clear roles and keeps these roles in the forefront of the school’s attention.</td>
</tr>
<tr>
<td>Involvement in Curriculum, Instruction, Assessment</td>
<td>Continues to be involved in helping teachers design curricular activities, assess assessment issues, and address instructional issues.</td>
</tr>
<tr>
<td></td>
<td>Is directly involved in the design and implementation of curriculum, instruction, and assessment practices.</td>
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<tr>
<td>Outreach</td>
<td>Ensures that the school complies with all district and state mandates.</td>
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<td></td>
<td>Is an advocate of the school with parents.</td>
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<td></td>
<td>Is an advocate of the school with the central office.</td>
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<tr>
<td></td>
<td>Is an advocate of the school with the community at large.</td>
</tr>
<tr>
<td></td>
<td>Is an advocate for the school to all stakeholders.</td>
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<tr>
<td>Relationships</td>
<td>Ensures that the school is aware of significant personal issues within the lives of staff members.</td>
</tr>
<tr>
<td></td>
<td>Ensures that teachers acknowledge significant events in the lives of staff members.</td>
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<tr>
<td></td>
<td>Maintains professional relationships with teachers.</td>
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<tr>
<td></td>
<td>Demonstrates an awareness of the personal aspects of teachers and staff.</td>
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<tr>
<td>Resources</td>
<td>Ensures that teachers have the necessary materials and equipment.</td>
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<tr>
<td></td>
<td>Ensures that teachers have the necessary staff development opportunities to directly enhance their teaching.</td>
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<tr>
<td></td>
<td>Provides teachers with materials and professional development necessary for the successful execution of their jobs.</td>
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<tr>
<td>Situational Awareness</td>
<td>Accurately predicts what could go wrong from day to day.</td>
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<tr>
<td></td>
<td>Is aware of informal groups and relationships among the staff.</td>
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<tr>
<td></td>
<td>Is aware of issues in the school that have not surfaced but could create discord.</td>
</tr>
<tr>
<td></td>
<td>Is aware of the details and undercurrents in the thinking of the school and uses this information to address current and potential problems.</td>
</tr>
<tr>
<td>Visibility</td>
<td>Makes systematic and frequent visits to classrooms.</td>
</tr>
<tr>
<td></td>
<td>Has frequent contact with students.</td>
</tr>
<tr>
<td></td>
<td>Is highly visible to students, teachers, and parents.</td>
</tr>
<tr>
<td></td>
<td>Maintains quality contact and interactions with teachers and students.</td>
</tr>
</tbody>
</table>


- Adapted and re-grouped by Susan Ledick for Heartland AEA 11; December, 2006.
Dale Carnegie Principles for Effective Leaders
A leader's job often includes changing the attitudes and behaviors of people. Some suggestions to accomplish this:

- Begin with praise and honest appreciation
- Call attention to peoples mistakes indirectly
- Talk about your own mistakes before criticizing the other person
- Ask questions instead of giving direct orders
- Let the other person save face
- Praise the slightest improvement and praise every improvement. Be “hearty in your approbation and lavish in your praise”
- Give the other person a fine reputation to live up to
- Use encouragement. Make the fault seem easy to correct
- Make the other person happy about doing the thing you suggest.

Carnegies' Twelve Principles to Win People to Your Way of Thinking

- The only way to get best of an argument is to avoid it
- Show respect for the other person’s opinions. Never say, “You’re wrong”
- If you are wrong, admit it quickly and emphatically
- Begin in a friendly way
- Get the other person saying “yes, yes” immediately
- Let the other person do a great deal of the talking
- Let the other person feel that the idea is his or hers
- Try honestly to see things from the other person’s point of view
- Be sympathetic with the other person’s ideas and desires
- Appeal to the nobler motives
- Dramatize your ideas
- Throw down a challenge
Fundamental Techniques in Handling People

- Don't criticize, condemn or complain
- Give honest and sincere appreciation
- Arouse in the other person an eager want

Fundamental Ways to Make People Like You and Trust You

- Become genuinely interested in other people
- Smile
- Remember that a person’s name is to that person the sweetest and most important sound in any language
- Be a good listener. Encourage others to talk about themselves
- Talk in terms of the other person’s interests
- Make the other person feel important- and do it sincerely
• Resources and Bibliography

  o “The Big Rocks” - Priority Management

  o “Dear Principal” by Gary Bloom

  o “Ten Big Ideas of School Leadership

  o “Reorganizing Leaders' Time: Does It Create Better Schools for Students”
**Bibliography/Resources**

**DVD videos (included with this guide)**
1. Daily meeting-TCC, principal, SAM
2. TCC and SAM + Daily meeting
3. Sam reviewing Time track data
4. TCC and two SAMS
5. TCC and principal: Sam effectiveness
6. Principal and student SAM
7. TCC doing annual data review
8. TCC and principal planning for PD
9. Transitioning from a model 1 to a model 3
10. Retiring principal and transition to model 3

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McCarthy, M. (2010). *Ten Big Ideas of School Leadership*
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