THE CENTER ON SCHOOL TURNAROUND
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# JUMP-STARTING INSTRUCTIONAL TRANSFORMATION FOR RAPID SCHOOL IMPROVEMENT

## A Guide for Principals

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The Center on School Turnaround
FOUR DOMAINS *Series*

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# Preface

This guide grew out of material used in the Transformation Academy, a professional learning program for principals charged with achieving the rapid improvement of their school. The intent of that program is to help principals get started with transforming instruction — the change that is at the heart of school improvement. Transforming instruction is a big job, engaging administrators and teachers over multiple years. Because the challenge can seem so daunting, school leaders can profit from some guidance in knowing where and how to begin. This guide provides that starting point.

In the approach laid out in this guide, the principal starts down the road to instructional transformation by convening a select group of teachers as an action team (or A-team) that will look closely at how the principal makes time for instructional leadership and how teachers help each other improve their practice. The team, which includes the principal, will examine every aspect of the school's instructional system, a system that consists of planning, providing, adjusting, and enhancing instruction. The team considers learning obstacles their students might face and how well the school builds students' capabilities as learners. At key points, the team solicits input from the entire faculty.

Using the information drawn from this initial examination, the A-team sets a course for achieving instructional transformation. They identify and incorporate necessary actions into two types of plan: The more-ambitious and inherently long-term improvement strategies they identify (e.g., replacing a curriculum or adopting a new technology) are integrated into their school's continuous improvement plan. But the A-team pays particular attention to identifying strategies that can be implemented quickly (e.g., within about 90 days). It's these latter strategies, collected into a 90-day action plan, that are intended to generate quick results from targeted repairs and enhancements to aspects of instruction that the team has critiqued.

Like the Transformation Academy from which it is drawn, this guide rests on the research and practice base of *Four Domains for Rapid School Improvement: A Systems Framework* (Center on School Turnaround, 2017). That framework identifies four areas of focus, and key practices in each, that have been shown to be critical for achieving rapid and significant school improvement, including instructional transformation, the focus of this guide.

The Center on School Turnaround at WestEd presents this guide, *Jump-Starting Instructional Transformation,* to assist both those participating in the Transformation Academy and the many principals who are charged with significantly improving their schools, but are unable to attend the academy.

# Introduction

## Jump-Starting Instructional Transformation

*Four Domains for Rapid School Improvement: A Systems Framework* (Center on School Turnaround, 2017) identifies four critical areas of focus, and key practices within each one, that have been shown to be essential in efforts to achieve rapid and significant school improvement. Among these domains, *instructional transformation* can be seen as the star of the show, with the other three — *turnaround leadership, talent development,* and *culture shift* — serving primarily as stage-setters. The practices in these latter three domains are oriented to establishing the right conditions for what must transpire in the classroom between teacher, students, and content if students are to learn and outcomes are to improve. In short, they establish the conditions for effective instruction.

In addition to explaining the key areas in which school improvement efforts should focus, and the connections between those areas, the *Four Domains* framework describes the interrelated roles of the state, district, and school in effecting significant school-level improvement. The framework justifiably portrays rapid school improvement as taking place in a multilayered system with important roles for players at each level, but one thing remains clear throughout: When it comes to actually changing what happens at a school, the principal is the linchpin in the whole affair.

### *Role of the Principal*

Although no one person alone can drive a school's transformation, it's the principal who establishes the site-level policies, structures, and routines necessary for significant change. And it's the principal who sets the tone for the school's relationships with the district office, the school board, its teachers and staff, its families, and its students. The principal is the connecting point among a community of people.

A school functions with its own internal systems, including its instructional system, in which instruction is planned, provided, and refined. Although teachers are the mainstay in each of the system's interconnected processes, it's the principal who manages the overall instructional system. The principal ensures that the work is coherent, process to process, and that it results in the best possible learning experience for students.

The principal may not be part of that magic pedagogical triangle of teacher-student-content, but when it comes to instructional transformation, the principal's role is front and center. He or she leads this transformation by astutely managing the instructional system, coordinating the work of the people in the system, and working with each person to improve or polish professional practice.

Any principal in a rapid improvement situation must understand students and the rudiments of effective teaching. But that leader must also know the school's individual teachers and understand how to engage them in practice-focused collaboration — that is, working together to examine and improve professional practice. This approach is premised on the assumption that everyone in a school's professional community has relevant expertise and experience to share and that everyone can benefit when sharing takes place.

It's easy for a principal, especially one charged with leading rapid change, to feel overwhelmed at the prospect of having to ramp up the performance of a host of teachers who are serving students of various ages, interests, and mastery levels in an array of subject areas. But in efforts to improve instruction, the principal need not stand alone. A principal can, and should, set up an environment in which he or she learns from the teachers and in which teachers are encouraged and given opportunities to share what they know with each other — in short, an environment in which practice-focused collaboration, between principal and teachers and among teachers, becomes the norm.

### *Role of an Action Team*

To help lead instructional transformation, a principal needs well-intentioned and well-informed allies who work together in the form of an action team. A school's A-team should consist of the principal and 2 to 10 teachers who are selected by and will work closely with the principal over a three-month period to jump-start instructional transformation. Although the team *must* include teachers, it may also include people in other roles, an assistant principal or a district liaison, for example. The qualifications for A-team membership are general knowledge of teaching and learning in the school, candor, logical thinking, reliability, and optimism. The principal might also recruit teachers who are strong in areas of teaching about which the principal has limited expertise. Equally important is availability: A-team members must be able to meet with the principal as a team for about an hour each week over the course of three months, with that hour devoted exclusively to the jump-start agenda.

The purpose of having such a team is to give the principal active thought partners with varied perspectives and expertise so that, together, they can closely examine how instruction is planned, provided, adjusted, and enhanced in their school. Team members also serve as communication conduits to the rest of the faculty, sharing and explaining the progress of the team while gathering feedback and other information from their teaching colleagues. The team's collective wisdom and critical insight contribute to cogent analysis of the findings and apt targeting of specific change efforts.

The A-team sets agendas for its meeting to include the activities prescribed in this document, keeps minutes of its meetings, and establishes the norms by which it operates. (See appendix B for a template of meeting agendas and minutes.) Norms are agreed-upon behaviors for the team, typically including such actions and attitudes as *start on time, stay for full meeting, listen actively, collaborate enthusiastically, participate fully, engage completely, be prepared,* and *show respect*. A strong A-team conducts a brief process check at the end of each meeting to see if the norms are being observed.

## The Leadership Challenge for Transforming Instruction

Instruction does not transform itself. Its transformation requires leadership that is catalytic, thoughtful, and persistent. That leadership resides largely with a school's principal — you. Although an effective principal wisely shares key decision-making functions with others, Walberg (2010) reminds us that, the importance of teamwork notwithstanding, "the school administration, chiefly the principal, is . . . responsible for leadership" (p. 47).

What obstacles do you and other principals face in your role as transformational leader? Principals charged with a school's rapid improvement are dealing with an instructional system in need of repair. Thus, your job includes a good dose of helping people

— predominantly teachers — do things *differently* in order to do them better. Getting people to change what they do or how they do it is no easy task.

Whether you're a new principal brought into a school needing substantial improvement or a current principal newly challenged to rapidly improve your school, as a leader you must "signal the need for dramatic change" and get "quick wins" (Herman et al., 2008). If change in general is always difficult, undertaking urgent change can be especially challenging. The success of the change efforts will depend on your astuteness in analyzing the situation, your focused attention, and your facility in dealing with the people whose practice must change.

For a principal charged with transforming instruction — or effecting any other major changes — the challenge is twofold: produce quick wins demonstrating that positive change can be a reality and garnering enthusiasm for it while also planning and moving teaching staff toward the kind of systemic transformation that requires a great deal of effort by many people over an extended period. Thus, the principal must navigate two improvement tracks at once: one to expeditiously shore up weak links in the instructional system, gaining quick wins, and the other to more deliberately plan and establish new and permanent structures and routines.

In doing this important work, many principals will encounter — and must find a way to deal with — a couple of difficult issues, one related to the circumstances of their overall job and the other related to self-doubt. The first issue is that, without any mitigating efforts, a principal's day can be fully consumed by managerial tasks that have little or nothing to do with the instructional system. The second is that many principals question whether their own instructional expertise suffices for leading instructional change across the full range of subject areas, grade levels, and student differences that are found in any school.

Faced with these issues, a principal may easily, unintentionally, and almost unknowingly stay away from instruction. When this happens, the relentless focus on instruction that is needed for rapid improvement (Herman et al., 2008) never materializes or is muted. In this guide, you'll find out how your fellow A-team members can help you deal with these two issues, in part through a collaborative consideration of how you currently spend your time and might reallocate it to focus more tightly on instruction and in part by sharing their own instructional expertise as, together, you examine and begin planning how to strengthen your school's instructional system, both in the short term and over the long haul.

## Four Early Actions in Planning Instructional Transformation

This guide describes four Early Actions (with related activities) that the A-team will undertake during the three-month jump-start period for instructional transformation: (1) establish practice-focused collaboration; (2) map the instructional system; (3) see through students' eyes; and (4) set the course for change.

During this time, your A-team colleagues are your close, candid, reliable, and knowledgeable allies. Together, you first engage in practice-focused collaboration concentrated on how you spend your professional day and how to free up more time to carry out your most important role: instructional leader. Still using the same collaborative approach, the A-team then looks at one instructional practice and determines how to enhance its implementation across the teaching faculty. Once the team is comfortable with practice-focused collaboration, members begin looking for ways to establish it as a school norm.

Next, the A-team closely examines and describes each stage in the instructional system and how it plays out at your school, essentially mapping the system. In the subsequent action,

the team looks at school and learning through the eyes of your students, trying to detect learning obstacles that need to be removed and identifying learning opportunities that should be extended or added. With the broader teaching faculty, the team explores ways to build students' capabilities as learners.

Finally, in the last action, the team draws from all that you and the team's other members have learned over the course of the first three Early Actions to establish and prioritize strategies for improving your school's instructional system. Those strategies that can be carried out relatively quickly — in about 90 days — become the meat of an action plan for rapid change. Other changes to your school's instructional system that will take longer to carry out are specified in the last action and integrated into your school's longer-term continuous improvement plan.

To get an overview of how you and fellow A-team members will be working over the three-month analysis and planning period, see appendix A, which provides a general schedule of A-team meetings and activities for the jump-start period. Appendix B provides a template for your meeting agendas and minutes.

Detail about each Early Action follows, with activities described for each one.

# Early Action 1: Establish Practice-Focused Collaboration

**(WEEKS 1–4 OF THREE-MONTH EXAMINATION-AND-PLANNING PERIOD)**

## The Trust Needed for Change

Colleagues working together to examine and improve professional practice — in this case, instruction — is what this guide refers to as *practice-focused collaboration,* and establishing this type of collaboration as a schoolwide norm is the first Early Action for a principal looking to jump-start rapid improvement. Essential to the success of this approach, especially when its aim is to improve teacher practice, is mutual trust — between principal and teachers and among teachers. For you as a principal, laying the ground for that trust is critical.

In a study of 400 elementary schools, Bryk and Schneider (2002) demonstrated the connection between high levels of trust among principals, teachers, students, and parents and the students' high performance on standardized tests. *Relational suasion* refers to someone's ability to positively influence another person through the strength of their relationship. For example, a student's respect for a teacher enhances the teacher's ability to positively influence the student. Likewise, the teacher's regard for the principal enhances the principal's ability to positively influence the teacher. Thus, the degree to which a principal is able to transform instruction depends, in part, on the quality of the principal-teacher relationship.

One way of building trust in that relationship or enhancing the existing trust level is for a principal to be sure — and to be able to demonstrate — that he or she really knows and understands both individual teachers and how the school's teachers operate as a faculty. Working as part of the A-team gives a principal a close-up view of individual teachers and a microcosm of teacher collaboration. Of course, the principal needs to understand all teachers and the workings of all teacher teams, but the A-team provides an especially close relationship with a few teachers in a very focused project and, therefore, is a particularly strong learning opportunity for the principal.

Because understanding each teacher is essential to how a principal might guide teachers individually and collectively, a principal might want to look at his or her faculty through the lens of four personal competencies that Carreker and Boulware-Gooden (2015) identify as undergirding a teacher's professional ability and propensity for growth. The researchers offer this explanation of the interplay between the teachers' personal competencies and the competencies of their students:

> Curiosity drives a teacher to seek new knowledge (cognitive competency), and a growth mindset sustains the teacher through the process of learning with resilience and persistence (motivational competency). The teacher's high expectations for success (social/emotional competency) improve the

> teacher's self-appraisal of what he or she knows and his or her self-management of selecting the most appropriate strategies to ensure students' academic success (metacognitive competency). The interplay of competencies that improves personal learning also augments professional learning, increasing the teacher's ability to enhance the same competencies in students. (p. 1)

Considering a school's individual teachers and its overall faculty through this lens of competencies helps a principal know how best to support their professional growth. And when teachers recognize that their principal understands and responds to both their professional strengths and their learning needs, trust is seeded.

This trust can be deepened when a principal demonstrates the recognition that many teachers are likely to possess greater knowledge than their principal about their subject, their students, and the most effective pedagogies for teaching that subject and those students. Through practice-focused collaboration with teachers, the principal can draw on the teachers' individual and collective experience and expertise — questioning, listening, encouraging along the way. The principal should also encourage and support practice-focused collaboration among teachers apart from the principal, whether one-to-one, in grade-level groups, or in any other configuration. Discussion of practice becomes the *lingua franca* of daily conversation.

Finally, a principal committed to developing mutual trust must show a willingness to put his or her own professional practice out on the table to be collaboratively examined, in this case specifically for the purpose of identifying how he or she can spend more time in support of instruction. This demonstration is the kickoff activity for Early Action 1: Establish Practice-Focused Collaboration.

## The Time Needed for Instructional Leadership

To underscore for teachers and staff the critical dimension of instruction in school transformation, a principal must demonstrate his or her own commitment to serving as instructional leader by dedicating an adequate amount of time and energy to the role. This means establishing regular opportunities to work with your teachers — individually, on teams, and as a faculty, both in meetings and in the classroom. It also means carving out more of your in-office time for instruction-related tasks, such as reviewing and giving feedback on lesson plans.

Writing about leadership in a school seeking substantial improvement, Murphy (2007) puts it this way:

> Learning-focused leaders devote abundant time to supporting colleagues in their efforts to strengthen teaching and learning in and across classrooms. Foremost, they are aggressive in identifying and removing barriers that prevent colleagues from doing their work well. They provide intellectual stimulation and make certain that teachers have a high-quality stream of job-embedded opportunities to expand, enhance, and refine their repertoires of instructional skills. They also make sure that the materials that teachers require to perform their jobs are on hand in sufficient quantity and in a timely fashion. Consistent with the involvement and investment theme, effective leaders demonstrate personal interest in staff and make themselves available to them. (p. 74)

Principals have to cover a lot of ground each day, so the question is how much time to spend on instruction-related responsibilities. The time needed will vary depending on a school's

context and the manner in which leadership is distributed; but, as a rule of thumb, you should probably preserve half of each day for instruction-related work. That includes time for meeting with individual teachers about their teaching, meeting with instructional teams, and observing classrooms. Are you wondering how to carve out that time? In activity 1.1, below, the A-team will engage to help you do just that, through practice-focused collaboration, with the practice in this case being your own, as it relates to time management.

## The Focus Needed to Improve Practice

After you set the example for practice-focused collaboration by inviting — indeed, challenging — your A-team colleagues to help you improve your own practice by making more time to serve as instructional leader, you then turn the team's attention to a specific *teaching* practice. In activity 1.2, below, the A-team selects one very specific instructional practice at the school and determines how it might be improved. The point of this activity is to set in motion a pattern of behavior — practice-focused collaboration — by which two or more colleagues closely examine how a particular practice is being enacted and consider how to improve it. The intent is not just to improve implementation of a given practice, but to begin to socialize a collegial, productive, and nonthreatening process of examining and continuously improving practice so that this process might become a norm at your school.

## A-Team Activities for Early Action 1: Establish Practice-Focused Collaboration

**Activity 1.1: Collaboratively analyze principal's use of time, with the aim of increasing the amount of time dedicated to instructional leadership.** See Appendix C: The Time Needed for Instructional Leadership (With Daily Time Log).

**Activity 1.2: Collaboratively analyze a specific instructional practice at your school and consider how it can be improved across the faculty.** See Appendix D: The Focus Needed to Improve Practice.

## Introduction and Early Action 1 References

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# Early Action 2: Map the Instructional System

**(WEEKS 5–10 OF THREE-MONTH EXAMINATION-AND-PLANNING PERIOD)**

## People and Systems

Early Action 1 focuses on people in the school, the principal and the teachers, and on seeding trust and collaborative relationships among them as a means for helping each other improve their professional practice. Now, Early Action 2 — Map the Instructional System — examines the system in which these people practice their profession. (Early Action 3 will shine a light on those who benefit from that practice, the students themselves.)

A smoothly running system of any type operates as a functioning whole, with coherence among its parts (Redding, 2006, p. iv). Because an instructional system is human-centric in nature, its *parts* are the functions that people perform within that system. An instructional system consists of the various stages of activity through which, first, a curriculum is organized as courses and units and, second, lessons are created, taught, and revised, then returned to the lesson library for future use.

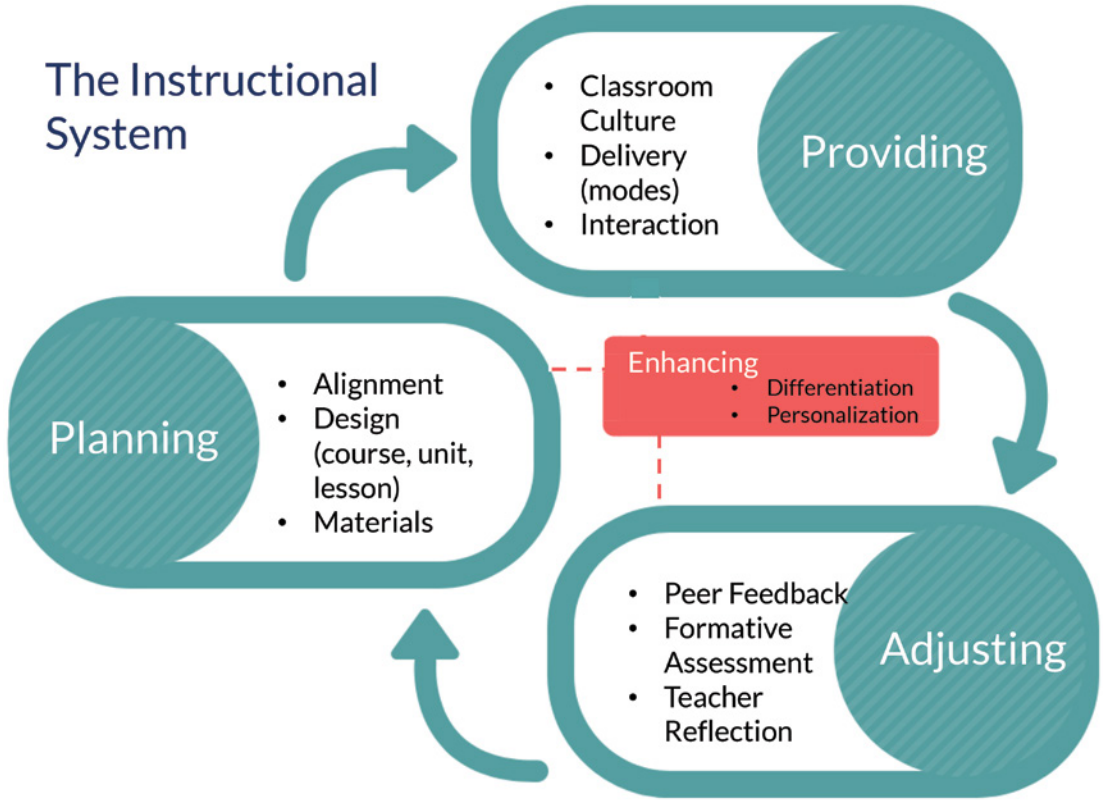
Why must a principal have a clear view of what's going on in the different stages of the instructional system at his or her school? Imagine a doctor setting a bone without an X-ray. Sure, it can be done, but only at great risk of error. Likewise, a principal who attempts to improve instruction without understanding the interrelated stages of the system that produce, deliver, and refine instruction at his or her school risks misdirected effort. Before initiating any repair to the instructional system, the principal needs to see inside that system, to understand how the "bones" are arranged, and to detect if any are cracked or broken.

The transformational leader understands and manages the system and the people in it, setting expectations and outlining routines that contribute to the coherence of what people do in each stage. W. Edwards Deming, an early guru of total quality management, as reported by John Hunter of The Deming Institute (n.d.), said that "a bad system will beat a good person every time." So, for a transformational leader, ensuring a good system is a challenge of the first order, with the qualifier "good" referring to a system that optimizes the performance, effectiveness, and satisfaction of the people who operate within it, teachers and students alike.

## Stages in the Instructional System

A school's instructional system is the series of staged activities through which a lesson — that single instance of a class session in a subject — is created, taught, refined, and used again. The process is cyclical in that lessons are not discarded once taught, but are revised, improved, and, for some lessons, enhanced, then put into the mix again for future service. In any school, procedures and policies govern the instructional system, and teachers engage in professional learning to elevate their skill in each of the system's stages.

**Figure 1: Stages and Sub-Stages of the Instructional System**




*Source:* Redding, S. (2018). *Instructional design*. Philadelphia, PA: Center on Innovations in Learning at Temple University. Used with permission. (For this and many other resources, see http://www.centeril.org)

Figure 1 illustrates the stages and sub-stages (i.e., components of each stage) and the cyclical nature of the instructional system. The main instructional cycle consists of the three stages of planning, providing, and adjusting *lessons* that fit into a coherent scheme of aligned units and courses. The fourth stage, considering how to enhance a lesson, may be an aspect of initial planning or may come into the process later, after the basic lesson has been created and taught at least once. In the latter case, the basic flow of good instruction is established before the more labor-intensive, sophisticated differentiation and personalization subsequently done for some lessons. By enhancing a lesson, the teacher (or instructional team) creates variations in the learning activities in order to differentiate paths to a common objective (target) for students who differ in their: (a) prior knowledge and skill related to the objective (differentiation); and (b) interests, paces of learning, preferred learning strategies, and learning competencies (personalization). The subject, grade level, and nature of a basic lesson determine whether it will be differentiated and/or personalized. In some cases, the basic lesson suffices for meeting the needs of all students and may not need enhancement. Teachers' reflection on the lesson, a review of formative assessment results, and feedback from peers enable teachers or an instructional team to contribute to a decision about whether and how to enhance.

## The Principal and the Instructional System

The transformational leader understands the purpose of each stage of the instructional system and how all stages affect each other. In any rapid school improvement effort, over time the entire system must be brought to a consistently high level of effectiveness. But early in the improvement process, during the jump-start period, the transformational leader will identify the weakest stages (and sub-stages) of the system and plan how to engage staff in working to strengthen them.

Strengthening any aspect of the instructional system requires changes both in procedures and in professional practices, changes that likely require a hike in expectations, effort, and expertise for all involved. This is where a principal's knowledge of the school's current instructional system and understanding of optimally effective instructional systems must proceed in concert with his or her skill in moving people to a higher plane of performance. The leader supports staff in adapting their practice to the new procedures and expectations, then relies on both implementation and outcome data to gauge the success of the changes.

## Metrics of the System

Educators working in schools are accustomed to gathering and analyzing a variety of data about students' learning and behavior, information that directly and indirectly impacts the creation and revision of lessons. Tracking student outcomes is one way to assess the ultimate effectiveness of the overall instructional system. But student data cannot help you determine the degree and quality of implementation for the stages (e.g., planning) and sub-stages (e.g., alignment) of the instructional system.

A few meta-metrics, such as those shown in table 1, can help you measure the degree and quality of implementation for the larger stages of the system. These meta-metrics are offered as examples of the kinds of measures a school might adopt to better understand its instructional system and to track change over time. Measures of this kind are especially useful in managing change.

### Table 1: Examples of Meta-Metrics for the Instructional Process

| Stage | Sub-Stage | Examples of Meta-Metrics |
|---|---|---|
| Planning | All | Total time per week for instructional team planning (all teacher instructional teams) |
| Providing | All | % of complete lessons taught per week (include definition and detail) |
| Adjusting | All | % of units with team-developed unit assessments |
| Enhancing | All | % of lessons per week that have been enhanced |

Table 2 suggests some micro-metrics that can be useful for gauging the degree and quality of implementation for each sub-stage of the instructional system. These metrics track lessons prepared at three levels of complexity: At the most basic level, a lesson includes *definition* (i.e., grade level, course, unit, standard[s], and objective); at the next level of complexity,

it also includes *detail* (i.e., a description of the activities of the teacher and students); and at the highest level of complexity, a lesson includes *enhancement* for differentiation and/or personalization.

### Table 2: Examples of Micro-Metrics for Sub-Stages of the Instructional System

| Stage | Sub-Stage | Examples of Micro-Metrics |
|---|---|---|
| **Planning** | | |
| | Alignment | % of units aligned; % of lessons aligned |
| | Design (course, unit, lesson) | % of lessons with definition (e.g., identifying objectives and related standards)<br>% of lessons with detail (e.g., delivery modes and activities) |
| | Materials | % of lessons with materials shared among teachers |
| **Providing** | | |
| | Classroom Culture | % of teachers with posted norms |
| | Delivery (mode) | % of lessons with more than one mode of delivery |
| | Interaction | % of lessons that allow two or more of nine student response methods (Marzano, 2017), in Appendix E: Ways Teachers Increase Students' Opportunities to Respond |
| **Adjusting** | | |
| | Peer Feedback | % of lessons that receive written feedback from a colleague |
| | Formative Assessment | % of lessons that include an assessment to gauge students' mastery of the lesson objective, with the degree of mastery documented by teacher |
| | Teacher Reflection | % of lessons that include a teacher's reflections after having taught the lesson |
| **Enhancing** | | |
| | Differentiation | % of lessons that have been enhanced for differentiation |
| | Personalization | % of lessons that have been enhanced for personalization |

Both micro- and meta-metrics, which may be added to the school's repertoire of data collection and analysis at any time, are especially helpful for detecting the impact of changes in procedures and practices. An analysis of implementation data (what teachers do) is critical to understanding student outcome data (how students perform). To improve student *outcomes,* the *input* variable — that is, instruction — must be changed, and data are needed in order to know the degree to which intended changes are implemented and, also, are yielding the desired results.

## Pace of Change

As a transformational principal, you must lead staff to take big, bold actions that quickly change some aspects of the school while moving them forward in smaller steps in other areas. In mapping the instructional system as part of the A-team, you get an overall view of each stage in the system, and it's likely you'll find some improvement needed in each one. Making all the needed changes could require years of work. But to jump-start the instructional transformation, the A-team will identify just a few (three or four) important changes that can be accomplished and begin to show results in a relatively short time (three months, perhaps). You will plan and aggressively pursue changes in these areas, making repairs and improvements to some aspects of the instructional system. At the same time, you'll note major changes, such as introduction of a new curriculum or adoption of new technology, that cannot be accomplished in a short time. You'll refer these longer-term changes for inclusion in the school's continuous improvement plan.

One example of a common weakness in an instructional system that might be addressed with some specific short-term action is having lessons that aren't adequately developed. Quick steps to improve this critical aspect of the instructional system might include: (1) adopting a lesson template; (2) training teachers to use the template; (3) monitoring its implementation by reviewing samples of lessons produced by teachers or teacher teams; and (4) reporting to the faculty on the level of implementation, using a few metrics. See appendices F and G for examples of a basic and enhanced lesson template, respectively.

The transformational leader who expects too much too soon risks confusion and disarray. Systematic and reasonably paced escalation of expectations ensures greater fidelity of implementation. Knowing what your school's lessons currently look like will help you know how to set the tempo for rollout of a new template and expectations related to it. If current lesson development is especially poor, you may want to raise expectations more gradually. You might, for example, initially have a template that included only a lesson's *definition* (e.g., grade level), then later, the template would be expanded to include lesson *detail* that describes the teachers' and students' activities, such as modes of instruction, assignments, modifications, accommodations, and resources.

Later still, you would want to raise expectations yet again by having a template that would include lesson enhancement. But timing is everything, and the transformational leader knows when it is time to up the ante by asking for more from staff in a specific stage or sub-stage of the instructional system. So, for example, you might want to hold off on the expectation for greater lesson enhancement until all teachers are working smoothly in well-disciplined teams — aligning, planning, reviewing, teaching, and reflecting — and until each teacher is confidently employing a few solid basic lessons each week in each subject.

Table 3 shows a gradual escalation in expectations for teachers (and their instructional teams, which are typically subject-matter or grade-level teams) to achieve various levels of

lesson development over phases of the improvement effort. The expectation is stated simply, in terms of numbers of lessons per week per course at each level of lesson sophistication: definition, detail, feedback from a colleague, and the lesson enhanced with differentiation and/or personalization.

### Table 3: Minimum Expectation for Lesson Development, by School Improvement Phase

| Target for Teacher | Phase 1 | Phase 2 | Phase 3 |
|---|---|---|---|
| Lessons With Definition | 1 lesson per week per course | 3 lessons per week per course | 5 lessons per week per course |
| Lessons With Detail | None expected | 1 lesson per week per course | 3 lessons per week per course |
| Lessons With Feedback | 1 lesson per week | 1 lesson per week per course | 1 lesson per week per course |
| Enhanced Lessons | None expected | 1 lesson per week per course | 2 lessons per week per course |

There are other ways to gradually escalate expectations for the performance of the instructional system, and the transformational leader must choose what fits best given the context and current need of the school. Some schools already have well-developed lesson plans for all classes, so in such schools the A-team might select a different stage of the system for gradually raised expectations. The appropriate expected rate of change is not subject to an exact formula; rather, it depends on what the leader knows about the teachers, on the leader's and teachers' proficiency in practice-focused collaboration, and on the leader's ability to manage systems.

## Mapping the Instructional System

Understanding the instructional system at your school is a matter of seeing its stages and knowing the degree to which they do or don't complement each other to produce desired results, which, in this instance, refers to having lessons that meet the needs of teachers and their students. To understand the current state of the instructional system at your school, you and your A-team colleagues start by seeking answers, and taking notes about what you find, for 11 sets of questions related to the stages and sub-stages of instruction: instructional design, instructional materials, classroom culture, delivery of instruction, interactions, peer feedback, formative assessment, teacher reflection, differentiation, and personalization.

When this exploration is completed, the team reviews what you have found and draws some conclusions about major strengths and challenges within your instructional system. The conclusions drawn, along with team notes, will inform subsequent action planning, which takes place in Early Action 4.

The most efficient way of getting a first cut of the answers is to dedicate A-team meetings to considering the questions, one by one. The team may choose to broaden input for discussion by conducting minisurveys of faculty, conversations with individual teachers, document

reviews, and observations of teacher teams and classroom instruction. Whichever specific information-gathering steps you choose to take, you then use the data you have to candidly discuss each question, aiming to achieve consensus.

Together you are looking for *patterns of practice,* the prevalent procedures and practices that characterize each stage, and how one affects another. The search for patterns is not an exact science. Rather it's an informal means by which the A-team gains an understanding of how instruction works in your school at this given time.

Following is a brief description of each of the four stages and sub-stages of instruction, with the questions that will help you flesh out the patterns of practices throughout the system. By jotting down notes to capture the discussion and the consensus answer for each question, the team will compile a body of information (a map) to be used later in action planning. The group's collective assessment of the relative strength of each stage or sub-stage will also serve as a guide to prioritizing system changes during action planning.

Dedicating a single A-team meeting to address all the questions related to one instructional stage sets a reasonable pace, letting you map your entire instructional system in four meetings. See Appendix H: Mapping the Instructional System (Tool), which has documentation forms to record conclusions from discussions.

### *Planning Instruction*

*Alignment* is the term commonly used to designate how the mass of potential content for learning is whittled down and shaped into manageable chunks that teachers then structure into subjects, courses, units, and lessons. At one time, this process was called curriculum building, and it coincided with creation of an instructional plan for a course. But today, learning standards are more commonly the starting point for alignment, with the curriculum formed around — or aligned to — those standards. And because instruction, in turn, is designed to cover the standards-aligned curriculum, instruction is also aligned.

Typically, the naming and arranging of courses into units is considered to be part of the alignment process, with descriptions of the courses and units included in curriculum guides. Individual lessons are then designed (see instructional design below) within the courses and units defined by the curriculum guide.

#### Alignment Discussion Questions

**AL1** Who creates the aligned curriculum? District teams? School teams? Individual teachers? Other?

**AL2** Where does the aligned curriculum reside? In district curriculum guides? School curriculum guides? Other? Online or hard copy or both?

**AL3** When and how often is the aligned curriculum reexamined and revised? By whom?

**AL4** How is the aligned curriculum organized? By subject? Grade level? Course?

**AL5** Who names courses and organizes them into units? District teams? School teams? Individual teachers? Other?

**AL6** How are student learning data used in the alignment process?

*Instructional design* is the process of organizing the aligned curriculum into courses, units, and individual lessons. Naming the courses and arranging them into units may be done as part of the alignment process (as indicated above), with descriptions of the courses and units included in the curriculum guides. In this case, instructional design consists of creating individual lessons and ordering them within the structure of courses and units. In other systems, instructional design would begin with a standards-aligned curriculum, but would include the creation of courses and units first and lessons within the units second.

The perfect lesson is considered by many to be the Holy Grail of teaching, and the transformational principal recognizes lesson design as a critical aspect of instructional planning. Each lesson should fulfill a purpose in a unit and be sequenced to account for its relationship with other lessons in the same unit. Each lesson should also stand alone, with its own objective, or learning target, that teacher and students pursue together (Moss & Brookhart, 2012). The design of a lesson outlines the path for reaching that target or, ideally, multiple paths for teaching the lesson because an effective lesson is enhanced for differentiation and personalization. Individual lessons are connected and mapped to a schedule, which becomes a teacher's lesson plan for a given course or unit. Although terminology about lesson development can vary, for the purpose of this guide, the terms *lesson* and *lesson design* are used interchangeably for the structure of a single session in a course. A lesson typically is implemented on one day, but can sometimes take more time; in contrast, a "lesson plan" comprises a sequence of individual lessons that may be delivered over a week, a unit, a grading period, or other schedule that encompasses multiple lessons.

Ideally, a lesson is designed according to a schoolwide lesson template used by all teachers. The template can help teachers structure the basic lesson, and it can also guide enhancement of the lesson. See appendix F for an example of a basic lesson template and appendix G for an example of a template that encourages enhancement through differentiation and personalization.

### Instructional Design Discussion Questions

**ID1** Is a standard template used by all teachers for their lesson designs? If yes, describe the template and how it is used.

**ID2** Are lessons created by individual teachers or teacher teams? Explain.

**ID3** Are lessons shared with all teachers so that good ideas spread? How?

**ID4** Do teachers receive feedback on their lesson design? From other teachers? From administrators? Explain.

**ID5** How are decisions made about situating individual lessons within a teacher's schedule to create a lesson plan? How is this plan made available for administration (e.g., principal, department head) to review?

**ID6** How are student learning data used in designing lessons? *Materials* that teachers use to teach a lesson, or that students themselves use in the lesson, are typically created by the teachers, individually or in teams. Although some materials, such as textbooks or online materials, are provided to the teacher and need only be referenced in a lesson plan, many teachers are inclined to use supplemental materials for teaching or as resources for their students.

### Instructional Materials Discussion Questions

**IM1** How are funds for *supplemental* materials requested, approved, budgeted, allocated, and accounted for?

**IM2** Where are materials stored? Centrally or by each teacher?

**IM3** Who creates or otherwise selects and secures the materials? Teams? Individual teachers?

**IM4** Are assembled materials marked according to purpose and stored where they can be circulated? By whom?

**IM5** How are student learning data used in decisions about creating and adopting materials?

## *Providing Instruction*

*Classroom culture* heavily influences the effectiveness of instruction and vice versa, with lessons designed both to form and to reinforce classroom norms. These norms include, for example, appropriate social interaction among peers and student routines for navigating the classroom, transitioning between settings (e.g., from whole class to groups), seeking help, and productively using unstructured time. Often such norms are initially established by each teacher, with students, through lessons created for that purpose in the first week or two of school; the norms are then reinforced daily throughout the school year. Within the boundaries of these classroom norms, each lesson plots the flow of activity during that class period, with the classroom arranged to accommodate the planned activity. Lessons might also include activities to further develop skills related to the norms or to reinforce expected behaviors.

### Classroom Culture Discussion Questions

**CC1** Are some classroom rules or norms officially adopted schoolwide? By whom? Explain.

**CC2** Do teachers follow common procedures to establish the classroom rules or norms? Describe procedures briefly.

**CC3** How are each teacher's *procedures for establishing* classroom rules or norms documented, and how are the final rules and norms made available to administration (e.g., principal, department head)? To students? To parents?

**CC4** How are classroom rules and norms taught and reinforced? Included in lesson plans?

**CC5** What determines when a student's behavior warrants attention by someone other than the teacher? Who is that someone? What is the process for referral?

**CC6** How would you characterize the culture of most classrooms? What descriptors come to mind? Warm? Caring? Orderly? Formal? Active? Engaged? To what extent do your descriptors cover nearly all classrooms?

**CC7** What data are tracked regarding student behaviors? By whom? For what purpose?

*Delivery* of instruction is when a planned lesson comes to life through the actual teacher-student interplay in the classroom. This sub-stage in the instructional cycle tends to get the most attention, as well it should. But the quality of lesson delivery depends on the quality of the lesson design, as well as on the teacher's knowledge of the topic and the quality of his or her interaction with the students. Although attention to the delivery practices of an individual teacher is necessary for purposes of coaching the teacher to improve practice, a broader perspective is needed in order to map the instructional system. You will need to home in on the overall patterns of practice in the school by generalizing from observation of multiple teachers, noting the ways that lessons first designed in the planning stage take life in the classroom.

### Delivery of Instruction Discussion Questions

**DI1** To what degree does the lesson template ask for sufficient information to guide how the lesson is conducted? Would a lesson created from the template adequately inform a substitute teacher?

**DI2** What are the classroom observation practices in the school? Who observes? How frequently? How are observations documented? How is the resulting information used?

**DI3** On average, how many instructional modes (whole-class, teacher-directed group; student-directed group; guided practice; independent practice; computer-assisted) are used by the school's teachers during a lesson? How many teachers exceed the average?

**DI4** How are student learning data used when establishing student groupings? When developing individual assignments?

*Interaction* refers to a teacher's interaction both with the whole class and with individual students and, also, to students' interaction with each other. Here, too, you and fellow A-team members are considering patterns of practice *across* the faculty. What is common, or typical, from classroom to classroom? Opportunities for interaction are outlined in the lesson design and also in how teachers view best practices within each instructional mode. A teacher's questioning skills also come into play. As the questions below suggest, the type and quality of interaction in a classroom is largely determined by the instructional modes and activities included in the lesson design.

### Interaction Discussion Questions

**IN1** During whole-class instruction, do teachers display a good balance between direct teaching and questioning/interacting with students?

**IN2** Do teachers use open-ended questioning and encourage students to elaborate in their responses?

**IN3** Do teachers encourage on-topic peer interaction among students? How?

**IN4** Do teachers provide appropriate verbal praise for specific student behaviors and responses?

**IN5** How are data about student interaction and engagement collected? Used?

### *Adjusting Instruction*

Lesson designs and the sequence of those lessons in a lesson plan can always be improved. Typically, when thinking about how to make adjustments to lessons, teachers consider three sources of information: (1) feedback from colleagues who critique the lesson design and/or observe the lesson as it's taught, (2) formative assessment of student performance to see whether the lesson is achieving its objective, and (3) the teacher's own reflections on teaching the lesson.

*Peer feedback,* from teacher to teacher, may come at any point in the instructional process, either as a routine quality assurance step within a school's instructional system or because a teacher has specifically requested such feedback. Collegial feedback is helpful throughout the process of developing and delivering lessons, starting as early as when courses are described. Feedback to inform refinement of course and unit descriptions is typically a routine step in lesson development. By nature, team-created lessons incorporate teacher feedback as they are developed, but they also benefit from feedback by colleagues outside the team. When lessons are designed or refined by an individual teacher rather than a team, that teacher may request peer feedback to strengthen the design and may also ask another teacher to observe the lesson when it is taught and to offer feedback afterward.

#### Peer Feedback Discussion Questions

**PF1** At which stages of the instructional system is feedback a formal part of the school's quality assurance?

**PF2** At which stages of the instructional system is feedback commonly requested by one teacher of another?

**PF3** Is feedback *required* at any stages? Which stages? In what form?

**PF4** Are common rubrics, critique forms, or similar templates used to record feedback? Describe.

**PF5** How is feedback shared?

*Formative assessment* is built into lessons for multiple purposes. Gathering in-the-moment feedback as a lesson is being taught is a means for improving the lesson afterward so that it is stronger when next used. Receiving immediate feedback also gives the teacher important information that enables him or her to adjust instruction on the fly. And, finally, it provides information a teacher can use in modifying assignments for individual students. Formative assessment helps a teacher determine whether students are making the expected progress toward the desired end, whether that "end" is the lesson objective for the day or the desired level of mastery at the end of a unit. Therefore, the lesson objective itself, with its conditions and criteria for mastery, provides the elements for a short-term formative assessment (of the student's progress to that moment) and may, in the aggregate, inform the unit assessment (the student's level of mastery of all objectives in the unit).

### Formative Assessment Discussion Questions

**FA1** What are the lesson template's requirements for specifying the means by which student mastery of lesson objectives is determined?

**FA2** Do formative assessment methods include unit pre- and post-tests or similar methods for determining change in student mastery as a result of instruction? Explain.

**FA3** Do teacher teams or individual teachers develop formative assessments for lessons and units? What is the process?

**FA4** How are formative assessments calibrated with standards? By whom?

**FA5** Do teacher teams review formative assessment results to adjust lesson plans? Explain.

*Teacher reflection* on a lesson he or she has just taught also provides valuable information for improving that lesson and adjusting lessons that follow. Reflections can be especially helpful when a teacher documents them and can share them with other teachers and/or refer to them in subsequent lesson development.

### Teacher Reflection Discussion Questions

**TR1** Do teachers routinely record reflections of lessons taught? How? How frequently?

**TR2** Are teachers' reflections shared with other teachers? With teams? How?

**TR3** Do teacher reflections follow a template of key points or are they free-form?

**TR4** Do teachers review formative assessment data from the lesson before recording reflections?

### *Enhancing Instruction*

A lesson is enhanced when the basic lesson is differentiated and/or personalized to create variations suited to individual students or groups of students with similar readiness to achieve mastery. These variations on the basic lesson may be included in the original design of the lesson or may be added later to strengthen a basic lesson design. To enhance a lesson, the teacher (or instructional team) creates variations in the learning activities in order to

- differentiate paths to a common lesson objective, or target, for students who differ in their prior knowledge and skill related to the objective and/or
- personalize the lesson by individualizing the pace of learning and including greater student choice among topics and types of learning activities.

Distinguishing between the two ways to enhance a lesson — differentiation and personalization — is not critical. There is overlap between the two, and each brings its own emphasis, but in both cases the aim is to break apart a lesson designed for *all* students in order to better meet the needs of individual students.

*Differentiation* is how teachers vary aspects of a lesson design to provide "different avenues to acquiring content, to processing or making sense of ideas, and to developing products so that each student can learn effectively" (Tomlinson, 2001, p. 1). In effect, a lesson design

with differentiation built in includes alternatives to some components so that the teacher or the student can choose the options most likely to achieve results for that particular student. In the common flow of classroom instruction, after a teacher has presented new content or skills, students have independent practice or group work, which is often introduced by the transitional step of guided practice and then reinforced by homework. Differentiation is most easily accomplished in the independent practice and homework aspects of the lesson, such as when a teacher might provide alternative assignments to match different student readiness relative to the lesson's objectives. Universal Design for Learning (UDL) (Hall, Vue, Strangman, & Meyer, 2003) is a model for differentiating instruction by removing barriers to learning for individual students through a variety of means, including offering multiple methods of presentation, individual practice, group work, and demonstration of mastery.

### Differentiation Discussion Questions

**DF1** Does the school require a standard methodology, such as UDL or Tomlinson's Differentiated Instruction model (Tomlinson, 2003)? If so, what is required?

**DF2** How are lessons enhanced to differentiate? By individual teachers? By teams?

**DF3** Are lessons typically enhanced to differentiate when created or later when adjusted?

**DF4** Do teachers provide alternative assignments to meet the learning needs of different students? In independent practice? In homework?

**DF5** Is guided practice a common technique in the school?

**DF6** How are student learning data used in planning differentiation?

*Personalization* is related to differentiation in its creation of various paths for learning and for achieving common objectives and standards. Whereas differentiation tends to focus on differences in student readiness for the lesson, personalization adapts lessons to an individual student by taking into account the student's interests, learning pace, and general learning skills. Personalization is also more likely to include student choice, allowing students to co-develop learning projects with the teacher or select among options in topics. The use of technology in personalized learning enables a teacher (and the student) to manage and document the learning process and access rich sources of information (Twyman & Redding, 2015).

### Personalization Discussion Questions

**PE1** How do lesson designs illustrate how the teacher will intentionally strengthen students' learning competencies (i.e., cognitive, metacognitive, motivational, and social/emotional)?

**PE2** What does "personalization" mean in this school?

**PE3** How are lessons enhanced to personalize? By individual teachers? By teams?

**PE4** Are lessons typically enhanced to personalize when created or later when adjusted?

**PE5** Does personalization include engaging students in the design of their learning paths?

**PE6** Does personalization include giving students choice in topics or assignments?

**PE7** Do teachers use technology to personalize? For what purposes?

**PE8** How are student learning data used in planning personalization?

## A-Team Activities for Early Action 2: Map the Instructional System

**Activity 2.1: Create a clear description — the map — of your school's instructional system by discussing and addressing targeted questions for each stage and sub-stage in the system.** See Appendix H: Mapping the Instructional System (Tool).

**Activity 2.2: Share with the faculty both the map you have created and your notes from the discussion questions; gather their feedback to revise your map.** See Appendix I: Faculty Meeting Agenda.

**Activity 2.3: Review faculty input on the map of your instructional system; adjust the map if needed; summarize strengths and weakness for each stage; and prioritize strategies for transformation in each stage.** See Appendix J: Prioritization of Transformation Strategies (Template).

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# Early Action 3: See Through Students' Eyes

**(WEEKS 11–12 OF THREE-MONTH EXAMINATION-AND-PLANNING PERIOD)**

## Students' Perspectives

In Early Action 1, you and fellow A-team members began to establish practice-focused collaboration as the normative mode of interaction among the adults in the school. In Early Action 2, you closely examined the system within which most of the adults in the school carry out their daily work — the instructional system. Now, in Early Action 3, you will generate a more complete picture of instruction in the school by adding in the students' perspectives.

Redding (2013) notes that, especially in rapid school improvement, understanding students' perspectives is invaluable:

> School improvement and school turnaround efforts rest largely on the shoulders of school leaders and teachers. That is fitting because these are the people who can most immediately effect change and the ones who create the culture of the school and engage directly with the students. Still, we will miss something important if we don't look at things through the eyes of a student and attempt to understand more about what motivates students to pursue and persist with learning and the skills they need to learn efficiently. (p. 6)

## Removing Barriers and Providing Opportunities

In discussing the domain of instructional transformation, *Four Domains for Rapid School Improvement* (Center on School Turnaround, 2017) also pushes educators to look beyond the *teaching* side of the teaching-learning equation to consider the *learning* side as well. In fact, two of the three framework practices in this domain direct attention straight to the student: "diagnose and respond to student learning needs" (p. 19) and "remove barriers and provide opportunities" for learning (p. 21).

Yet, especially for a principal whose school is in need of rapid improvement, focused attention on students and their learning often takes a back seat to pressing issues that revolve around personnel, budgets, schedules, and improvement plans. As noted earlier, the principal — and the principal's time — can easily become fully absorbed by the managerial aspects of the job and by the necessary engagements with stakeholders, including teachers, parents, district administrators, the school board, and community leaders. It can be a shock to realize how little of a principal's time is reserved for focused attention on students and their learning.

Depending on the size and circumstances of a school, it may be difficult for a principal to get to know every student well, but the principal *can* purposefully try to take into account

students' perspectives. Specifically, the principal can make a practice of viewing every aspect of schooling through the eyes of students. Just what does that mean? Of course, a principal is constantly aware of students; they dominate the landscape of the classroom, the hallways, the cafeteria, the playground, and the athletic fields. But when it comes to instruction, it is easy for a principal to focus almost solely on what teachers and staff are doing and not pay attention to how students are experiencing the instructional action in the classroom. In seeing through students' eyes, the principal or other A-team members look at each instructional activity — whether when reviewing a lesson in advance or observing its delivery — as a student might view it. Of course, they look at what the lesson is intended to teach, but they also closely consider how a student might perceive it. Adding to the challenge for observers is that different students perceive the same lesson in different ways: One student might be nodding her head in comprehension of what the teacher is saying, whereas another is gazing into space or fidgeting, distracted, bored, or confused. What might each of these students be thinking?

So principals and others on the A-team will want to watch students in the classroom, both individual students and clusters of students. Are they curious, eager, bored, discouraged, scared, lonely, tired? How do different students react to rules, to announcements, to routines, to good grades, to bad grades, to the starting bell, to the ending bell? All of this is important, but does not suffice. Attention to student perspective should not be limited to the classroom. Pay attention in the hallways, the cafeteria, the gymnasium, the library. The principal and other A-team members may already see all students in all such contexts every day. But now is the time to observe with the intent to interpret, to take note. What do you see? How might you interpret what different students are thinking and feeling in the given situations?

Which teaching strategies are most successful in engaging students? It is worth identifying these instructional strategies and noting which teachers employ them. These teachers can be tapped as mentors in practice-focused collaboration, demonstrating for their colleagues successful engagement strategies.

In observing students, how do you think *they* are interpreting the behavior of their teachers? How do they appear to understand or respond to the actions of teachers, the teachers' words of familiarity, of reprimand, of encouragement? Hattie and Yates (2014) write that "at all levels of education, students actively rate and evaluate their teachers" (p.24). Speaking directly to teachers, the authors note that "these ratings relate not to your personality, but more to how your students feel they are treated. Your students need to define you as an acceptable, warm, and competent human being, even though they may be relatively uninterested in you as a person" (p. 26).

When this individual sense of being cared for by one's teacher is multiplied across the school — by each student and by each teacher — the product is a caring school culture. Research on resiliency clearly shows that when students perceive themselves as having caring teachers and caring schools, that perception positively affects students' resiliency, motivation to learn, and learning outcomes (Benard, 2004). Looking through the eyes of your students, do you and your fellow A-team members see this essential caring and fair treatment shining through in interactions between teachers and student?

What Carter and Darling-Hammond (2016) say about teachers is also true of transformational leaders: They "must know their students — who they are, what they care about, what languages they speak, what customs and traditions are valued in the home" (p. 622).

## Students' Capabilities as Learners

In addition to trying to be more attuned to how the students at your school experience teaching and learning and the general culture, seeing through a student's eyes requires a deep consideration of how and why the typical student learns. When you and your staff have that understanding, it enables more-informed discussion of how to enhance learning for students, in general and individually.

A student's capacity to learn derives from the interplay of four personal competencies — cognitive, metacognitive, motivational, and social/emotional — that express themselves through a student's behavior when presented with a learning challenge (Redding, 2014, 2016).

These patterns of behavior, or learning habits, can be acquired almost by osmosis through schooling and through learning outside school. But the habits can also be built and strengthened through intentionally focused instruction of the competencies (Dean, Hubbell, Pitler, & Stone, 2012). Students' learning habits, which reflect their competencies, are observable, and consciously looking for these behaviors tells the principal or teacher a great deal about how and why students learn and how learning habits vary from student to student.

### *What Students Know — Cognitive Competency*

Cognitive competency is the learner's reservoir of knowledge and his or her facility for accessing it to make connections that enhance new learning. University of Virginia cognitive psychologist Daniel Willingham (2009) explains the relative importance of cognitive content in learning compared with the importance of cognitive process:

> Data from the last 30 years lead to a conclusion that is not scientifically challengeable: thinking well requires knowing facts, and that's true not only because you need something to think about. The very processes that teachers care about most — critical thinking processes such as reasoning and problem solving — are intimately intertwined with factual knowledge that is stored in long-term memory (not just found in the environment). (p. 28)

Cognitive competency is built upon what is known, and the student who knows more is more able to learn. Background and foundational knowledge are critical to new learning, and students' knowledge comes from a variety of experiences. The transformational leader recognizes that some students, by virtue of the experiences their families provide them, start off with bigger stores of knowledge compared with other students.

The *Four Domains* (Center on School Turnaround, 2017) framework suggests ways to enhance students' cognitive competency by extending learning opportunities for those who need them, such as "summer bridge programs, after-school and supplemental educational services, Saturday academies, enrichment programs, credit-recovery programs, and virtual courses" (p. 21). The *Four Domains* framework also recommends that teachers "give students demonstrating sufficient prior mastery access to higher-level assignments and courses" (p. 21).

In their compilation for the National Research Council of research and theory on how students learn, Donovan and Bransford (2005, pp. 1–2) isolate three fundamental principles of learning:

1. Students come to the classroom with preconceptions about how the world works. If their initial understanding is not engaged, they may fail to grasp the new concepts and information or they may learn them for purposes of a test, but revert to their preconceptions outside the classroom.

2. To develop competence in an area of inquiry, students must (a) have a deep foundation of factual knowledge, (b) understand facts and ideas in the context of a conceptual framework, and (c) organize knowledge in ways that facilitate retrieval and application.

3. A "metacognitive" approach to instruction can help students learn to take control of their own learning by defining learning goals and monitoring their progress in achieving them.

These three principles underscore the significance of cognitive competency and its sister competency, metacognitive competency, discussed below.

### *How Students Learn — Metacognitive Competency*

As psychologist Albert Bandura (1997) explains, "An integral part of effective instruction is teaching students how to regulate their own learning" (p. 223). Combine this self-regulatory capacity with related skills and habits for learning and you have "metacognitive competency." School learning requires competence in an array of skills, including task definition, goal-setting, active listening, note-taking, strategic reading, organization of content, research, questioning, memorization (mnemonics), outlining, practice, analytical thinking, self-monitoring, and test preparation, along with the self-regulatory habit of time management.

When learning strategies are actively taught and students are made aware of learning tasks to which the strategies can be applied, students simply learn better (Pressley, Gaskins, Solic, & Collins, 2006). Teaching and reinforcing self-regulatory and learning skills is most effective when embedded within the context of the subject lessons (Hattie, 2012).

In his synthesis of 800 meta-analyses of factors that influence achievement, Hattie (2009) found *reciprocal* teaching to be among the instructional strategies with the greatest effect. This method, when most effective, includes explicit instruction in metacognitive strategies (e.g., summarizing, questioning, clarifying, and predicting), followed by teacher-student dialogue regarding the application of these strategies to content (text) and by opportunities for students to practice.

Lesson plans and course descriptions reveal the extent to which metacognitive skills and habits are intentionally taught, modeled, and reinforced. The degree to which a teacher is intentionally helping students develop these skills and habits can also be seen in classroom observations, and the importance of doing so can be emphasized in your practice-focused collaborations with teachers.

### *Why Students Learn — Motivational Competency*

Student motivation to learn may be viewed as a function of a teacher's instructional practices (Margolis & McCabe, 2006) and of a student's mindset (Dweck, 2000, 2006), with the latter strongly influenced by the former. Brophy (2004) suggests that students' motivation to learn — to master the knowledge and skills of the lesson before them — is typically seeded through the teacher's extrinsic rewards (e.g., recognition, good grades) and punishments (e.g., bad grades), but that, over time, mastery itself may become intrinsically rewarding to students. The ultimate goal of instruction is for students to become intrinsically motivated *toward* and *by* mastery in learning. However, for many students the extrinsic consequences (rewards and punishment) of their efforts serve as necessary initial prods in their learning.

A principal might best understand students' motivation to learn by considering what students — collectively and individually — value and how they perceive their own capabilities. Expectancy value theory suggests that a person's eagerness to engage in an activity and to persist with it depends both on how much the individual values the activity and on his or her expectation for success in the activity (Wigfield & Eccles, 2000). For an individual learner, this calculation is compared with how much he or she values and expects success in other activities that might compete for time and attention. For a student, spending two hours doing homework competes with all the other things the student could — and might want to — do with the same two hours.

Although it would be nice to think that students value learning in part because it pays off with a good career in their adult life, the degree to which many students value learning is related to their more immediate experience. Forty-seven percent of dropouts report that they left school because classes were uninteresting (Bridgeland, Dilulio, & Morison, 2006). Put another way, students forgo future benefits based on their priorities in the here and now (Smith & Wilhelm, 2002, 2006). These findings point to the importance of ensuring that instruction is engaging, but to do so requires *expanding* students' interests as much as tapping into them. Making learning interesting rather than merely relevant is especially important and is a worthy challenge for teachers.

### *How Students Relate — Social/Emotional Competency*

It has become clear that a student's social/emotional competency not only affects school learning, but also is important in its own right. A meta-analysis by Durlak and colleagues (2011) of social and emotional learning (SEL) programs found that when well implemented, strong SEL programs yielded an 11-percentile-point gain in academic achievement for participants. The authors outlined four conditions that are foundational to successful social and emotional programs and approaches:

1. peer and adult norms for high expectations with academic support that enables students to meet those expectations;
2. caring teacher-student relationships;
3. student engagement through the teacher's classroom management practices and cooperative learning; and
4. safe and orderly environments in which positive behaviors are taught, encouraged, and reinforced.

Obviously, the teacher-student relationship is central to SEL, and that relationship has an impact on student learning when combined with programmatic efforts to build and reinforce students' social and emotional skills. A teacher's intentional efforts to develop students' social and emotional skills and knowledge should be documented in course descriptions and lesson plans, and the teacher-student relationship can be observed in the classroom. The transformational leader must promote and model an intentional emphasis on this competency (e.g., through practice-focused collaboration with teachers).

In the broadest interpretation of social and emotional competency, all students need to develop strong social skills and understand the connections between their own emotions and their behaviors in order to successfully manage their behavior in a variety of social contexts, both inside and outside school. A second interpretation of social and emotional competency relates to the needs of students who have experienced trauma and, as a result, are emotionally fragile. The supports and services needed for these students are of a different

nature from those that focus on skill development. The transformational leader is on the lookout for how the school addresses the two types of social and emotional need.

The Early Action of seeing through students' eyes, which, when adopted by all personnel, has a significant impact on instruction and school culture, can be facilitated by using two tools.

The first tool, See Through Students' Eyes Observation and Analysis, found in appendix K, is a structured journal in which the principal and fellow A-team members (or other teachers or staff) keep notes about what they learn from their efforts to see through students' eyes and what they think might be done to remove barriers and expand opportunities.

The second tool, Lesson Review/Observation for Personal Competencies, found in appendix L, suggests what to look for when reviewing lessons and observing in the classroom to determine if the lesson design attempts to build students' personal competencies. The tool may also be used by teachers themselves to review and critique their own lessons and class sessions, by peers (teachers observing and critiquing each other) and by the transformational leader in practice-focused collaboration to create and review lesson plans and in classroom observations.

## A-Team Activities for Early Action 3: See Through Students' Eyes

**Activity 3.1: Draw from your observations and interviews to develop a list of ways to remove barriers and expand opportunities for students at your school.** See Appendix K: See Through Students' Eyes Observation and Analysis (Tool).

**Activity 3.2: Introduce faculty to the strategies for building students' personal competencies and help them understand how to embed those strategies in lesson plans.** See Appendix L: Lesson Review/Observation for Personal Competencies (Tool).

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# Early Action 4: Set the Course for Change

**(WEEKS 13–14 OF THREE-MONTH EXAMINATION-AND-PLANNING PERIOD)**

## Poised for Action

As the 90-day jump-start period is nearing its end, you will take into account what you have learned and plan for transformative action. In Early Actions 1 and 2 of *Jump-Starting Instructional Transformation,* you and your A-team colleagues worked closely in practice-focused collaboration to shine a light on every corner of the instructional system. In Early Action 3, you turned the spotlight from teachers and their lessons to students and their perceptions and capabilities as learners. The main outcome of all this examination and discussion is a comprehensive understanding of how instruction works in your school — an understanding that will guide subsequent action. In short, you and the other A-team members have in front of you the equivalent of the doctor's X-ray, and you now know what needs to be fixed. Next comes the transformation, and it *begins* with taking the conclusions the team has drawn over the past three months and translating them into concrete action planning.

In Early Action 4, you will consolidate what has been learned and move deliberately toward transformative action. Action will certainly include change in practice — how things are done in the school relative to instruction — and may also include changes in procedures, policy, and process to routinize, internalize, and sustain the changed practices. These changed practices will become part of the way your school operates. Some of the changes should take place very soon and will be included in a 90-day action plan. Other changes will take more time and will be incorporated into your school's continuous improvement plan. The A-team will closely guide implementation of the 90-day action plan, tracking progress and making course adjustments in order to get the job done. Among both the short-term and the long-term changes in instructional practice, some will require that teachers participate in professional learning if the changes are to be effectively implemented. Close communication with the faculty will be required for the effective implementation of any of the planned changes.

Of course, there is much more to the transformation of an instructional system than what is touched on in this jump-start guide. Danielson (2002), for example, points to aspects of the school's organization — the master schedule, how personnel are deployed, how students are grouped, how parents are engaged, the assessments that are available, progress reporting, and a variety of policy considerations — as matters closely tied to instruction. So, too, is the curriculum itself. In time, all such matters must be considered and, as needed, addressed by a transformational leader and the leader's collaborative partners, including, but not limited to, the A-team. But the immediate task is to consolidate the conclusions you've drawn during this three-month jump-start period and convert them into a draft of (1) a 90-day action plan whose proposed changes can be implemented in short order and (2) objectives for longer-term changes to incorporate into the school's continuous improvement plan.

## A-Team Activities for Early Action 4: Set the Course for Change

**Activity 4.1: Develop a draft 90-day action plan that recommends (a) specific changes in practice that can be implemented within the next 90 days to launch instructional transformation and (b) longer-term changes in the instructional system for possible inclusion in the school's continuous improvement plan.** See Appendix M: Draft 90-Day Action Plan to Launch Transformation (Template).

**Activity 4.2: Work with the whole faculty to modify the draft action plan, converting it to a final action plan that is fleshed out in greater detail. With the whole faculty, begin implementing the final plan.** See Appendix N: Final 90-Day Action Plan to Launch Transformation (Template).

**Activity 4.3: Each week, review progress in implementing the 90-day action plan and complete the entries for that week in the Progress Tracking Form.** See Appendix O: Progress Tracking for 90-Day Action Plan (Template).

## Early Action 4 Reference

Danielson, C. (2002). *Enhancing student achievement: A framework for school improvement.* Alexandria, VA: ASCD.

# Appendix A: Schedule of A-Team Meetings and Activities During 90-Day Jump-Start Period

## Early Action 1: Establish Practice-Focused Collaboration

A-Team Meeting Week 1 — Introduction to Instructional Transformation

A-Team Activity 1.1: Collaboratively analyze principal's use of time, with the aim of increasing the amount of time dedicated to the practice of instructional leadership. See Appendix C: The Time Needed for Instructional Leadership (With Daily Time Log).

A-Team Meeting Week 2 — The Time Needed for Instructional Leadership (Part 1)

A-Team Activity 1.1: Continued.

A-Team Meeting Week 3 — The Time Needed for Instructional Leadership (Part 2)

A-Team Activity 1.1: Continued.

A-Team Meeting Week 4 — The Focus Needed to Improve Practice

A-Team Activity 1.2: Collaboratively analyze a specific instructional practice at your school and consider how it can be improved across the faculty. See Appendix D: The Focus Needed to Improve Practice.

## Early Action 2: Map the Instructional System

A-Team Meeting Week 5 — Introduction to the Instructional System

A-Team Activity 2.1: Create a clear description — the map — of your school's instructional system by discussing and addressing targeted questions for each stage and sub-stage in the system. See Appendix H: Mapping the Instructional System (Tool).

System — Planning

A-Team Meeting Week 6 — Map the Instructional System

A-Team Activity 2.1: Continued. See Appendix H: Mapping the Instructional System (Tool).

System — Providing

A-Team Meeting Week 7 — Map the Instructional System

A-Team Activity 2.1: Continued. See Appendix H: Mapping the Instructional System (Tool).

System — Adjusting

A-Team Meeting Week 8 — Map the Instructional System

A-Team Activity 2.1: Continued. See Appendix H: Mapping the Instructional System (Tool).

System — Enhancing

Faculty Meeting Week 9 — The State of the Instructional System

A-Team Activity 2.2: Share your notes from the discussion questions — the map — with the faculty and gather their feedback to revise your descriptions. See Appendix I: Faculty Meeting Agenda.

A-Team Meeting Week 10 — Prioritize Change in the Instructional System

A-Team Activity 2.3: With the A-team, review the faculty input to the map of instructional system, summarize strengths and weaknesses for each stage, and prioritize strategies for transformation in each stage. See Appendix J: Prioritization of Transformation Strategies (Template).

## Early Action 3: See Through Students' Eyes

A-Team Meeting Week 11 — Removing Barriers and Providing Opportunities

A-Team Activity 3.1: Draw from your observations and interviews to develop a list of ways to remove barriers and expand opportunities for students at your school. See Appendix K: See Through Students' Eyes Observation and Analysis (Tool).

A-Team Meeting Week 12 — Building Students' Capabilities as Learners

A-Team Activity 3.2: Introduce the faculty to the strategies for building students' personal competencies and help them understand how to embed those strategies in lesson plans. See Appendix L: Lesson Review/Observation for Personal Competencies (Tool).

## Early Action 4: Set the Course for Change

A-Team Meeting Week 13 — Planning for Action

A-Team Activity 4.1: Develop a draft 90-day action plan that recommends (a) specific changes in practice that can be implemented within the next 90 days to launch instructional transformation and (b) longer-term changes in the instructional system for possible inclusion in the school's continuous improvement plan. See Appendix M: Draft 90-Day Action Plan to Launch Transformation (Template).

Faculty Meeting Week 14 — Finalizing the Action Plan

A-Team Activity 4.2: Work with the whole faculty to modify the draft 90-day action plan, converting it to a final action plan that is fleshed out in greater detail. With the whole faculty, begin implementing the final plan. See Appendix N: Final 90-Day Action Plan to Launch Transformation (Template). Refer longer-term changes for inclusion in the school's continuous improvement plan.

A-Team Meetings Weekly for 90 Days to Implement the Action Plan

A-Team Activity 4.3: Each week, review progress in implementing the 90-day action plan and complete the entries for that week in the Progress Tracking Form. See Appendix O: Progress Tracking for 90-Day Action Plan (Template).

# Appendix B: A-Team Meeting Agendas and Minutes (Template)

This example of an agenda template includes a place for taking minutes.

## A-Team Meeting Agenda

**Team Name Here:**

**Meeting Location Here:**

**Date:** **Time:**

**Assigned Roles**

**Facilitator:** *(add team member name)*

**Timekeeper:** *(add team member name)*

**Note Taker:** *(add team member name)*

**Process Observer:** *(add team member name)*

**A-Team Members**

| (first name of each person) | (last name of each person) | (position of each person) |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

| Time *(in minutes)* | Person Responsible | Agenda Item | Minutes (Summary of Key Points) |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

**Note Taker Action Items Review***

**Time** *(in minutes)*

| Agenda Item | Completion Date | Person(s) Responsible |
|---|---|---|
| | | |
| | | |
| | | |

***Action Items Review:** Note taker reviews all action items, with dates of completion and person responsible. These items are added during the note-taking process during the meeting, then entered here and reviewed during this part of the agenda.

**Process Observer**

**Time** *(in minutes)*

**Process Observation Report** *(How well did the team comply with its norms? Stick to agenda?)*

**Next Meeting Reminder**

Date and Time:

# Appendix C: The Time Needed for Instructional Leadership (With Daily Time Log)

## A-Team Meeting 1 — Introduction to Instructional Transformation

**A-Team Activity 1.1: Collaboratively analyze principal's use of time, with the aim of increasing the amount of time dedicated to the practice of instructional leadership.**

**Effective Practice:** Focus your role as principal on building the leadership capacity of others, achieving learning goals, and improving instruction.

**Indicator of Effective Practice:** As principal, you spend at least 50 percent of your time working directly with teachers to improve instruction, including conducting classroom observations.

**Step 1:** At the A-team meeting, list your typical daily activities and, together with the rest of team, mark those directly related to instruction (e.g., classroom visits, meeting with instructional teams, meeting with individual teachers regarding instruction, in-office planning on instruction, review of lesson plans).

**Step 2:** For five consecutive days, complete a daily log to track how you spend your time (how much time on which tasks) over the course of the day.

## A-Team Meeting 2 — Time for Instructional Transformation (Part 1)

**Step 3:** Meet with your A-team again to calculate the total time spent each day on each type of task, the totals for the week, and the percentage of time devoted to instruction-related work.

**Step 4:** With the A-team, plan ways to change how typical non-instruction-related tasks are handled so as to enable you to focus more time on instruction. Implement the planned changes.

**Step 5:** Each day for the following week, track your time again.

## A-Team Meeting 3 — The Time Needed for Instructional Leadership (Part 2)

**Step 6:** With the A-team, again calculate the total time spent each day on each type of task, the totals for the week, and the percentage of time you devoted to instruction.

**Step 7:** With the A-team, compare the time usage in the first week's log with the time usage in the second week's log. Did you gain more time for instruction-related activities? If not, why not?

It is useful to repeat this time-usage activity periodically, maybe once every two months, in order to see that constructive changes in duties and schedules are perpetuated and to seek more ways to allocate time to improve instruction.

This activity can be eye-opening for both the principal and the A-team teachers. Many principals are so immersed in their established patterns of time allocation that they cannot see other options. But teachers, who often bring a fresh perspective to how the principal operates, are more likely to see alternatives, such as having the principal share duties with others or set aside blocks of time for meeting with teachers. In such discussions, solutions arise in response to the particular situation of the principal and the school. By engaging teachers to collaboratively focus on improving your own leadership practice as a principal, you take two critical steps toward improving your school's instructional system: You set a strong example of the importance of practice-focused collaboration for everyone, and you find a way to focus more of your own time on instruction.

## Principal Daily Time Log

**Principal's Name:**

**Day of Week:** **Date:**

**TASK CODES**

**CV:** Classroom Visits
**IO:** In-Office Instruction Work
**OM:** Other Meetings
**TM:** Teacher(s) Meeting
**SM:** Meeting With Student(s)
**SS:** Student Supervision
**IM:** Instructional Team Meeting
**PM:** Meeting With Parent(s)
**OT:** Other
**FM:** Faculty Meeting

| Time Start | Time Stop | Total Minutes | Code | Topic | Instruction-Related? Yes or No | Notes |
|---|---|---|---|---|---|---|
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |
| | | | | | Yes<br>No | |

## Principal Weekly Time Log

**Principal Name:**

| Day | Date | *Instruction-Related* Classroom Visits | *Instruction-Related* Meetings With Teacher(s) | *Instruction-Related* Meetings With Instructional Teams | *Instruction-Related* Faculty Meetings | *Instruction-Related* In-Office Curriculum/ Lesson Work | *Non-Instruction-Related* Meetings With Students | *Non-Instruction-Related* Meetings With Parents | *Non-Instruction-Related* Other Meetings | *Non-Instruction-Related* Student Supervision | *Non-Instruction-Related* Other |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Monday | | | | | | | | | | | |
| Tuesday | | | | | | | | | | | |
| Wednesday | | | | | | | | | | | |
| Thursday | | | | | | | | | | | |
| Friday | | | | | | | | | | | |
| **Total Minutes:** | | | | | | | | | | | |

**Total Minutes Instruction-Related for Week:**

**Total Minutes Non-Instruction-Related for Week:**

**Notes** *(list other uses of time that aren't within the categories above and approximate hours and minutes devoted to them in the week)*

## Principal Time Study Discussion Questions: List 1

**What type of tasks did the principal spend the most amount of time doing?**

**What type of tasks did the principal spend the least amount of time doing?**

**What "other tasks" did the principal note that were not listed?**

**What % of time is the principal spending on instructional tasks?**

**How could more time be allocated for instruction, including collaboration with individual teachers and teacher teams, class observations, curriculum development, and lesson planning?**

**What specific steps can be taken now to start to make those allocations for next week's time study?**

## Principal Time Study Discussion Questions: List 2

**What type of tasks did the principal spend the most amount of time doing?**

**What type of tasks did the principal spend the least amount of time doing?**

**What "other tasks" did the principal note that were not listed?**

**What % of time is the principal spending on instructional tasks?**

**Was there an increase in the % this week compared with last week?**

**How could more time be allocated for instruction, including collaboration with individual teachers and teacher teams, class observations, curriculum development, and lesson planning?**

**What specific steps can be taken now to start to make those allocations for next week's time study?**

# Appendix D: The Focus Needed to Improve Practice

## A-Team Meeting 4 — The Focus Needed to Improve Practice

**A-Team Activity 1.2: Collaboratively analyze a specific instructional practice at your school and consider how it can be improved_across the faculty.**

**Step 1:** Align each of the following *specific* practices within one of the three domain practices in the Instructional Transformation Domain as follows:

Domain Practice 1: Diagnose and respond to student learning needs.

Domain Practice 2: Provide rigorous evidence-based instruction.

Domain Practice 3: Remove barriers and provide opportunities.

*Specific* Practices to Align With Domain Practices

- Shift instructional modes at least once in each lesson.
- Reinforce classroom rules and procedures by positively teaching them.
- Use modeling, demonstration, and graphics to introduce lessons.
- Speak with expression and use a variety of vocal tones.
- Use prompting/cueing to engage students.
- Maintain a record of each student's mastery of specific learning objectives.
- Maintain a file of communication with parents.
- Develop weekly lesson plans based on aligned units of instruction.

***[Feel free to add others]***

Select a single, specific instructional practice to examine. Pick one that the team thinks will most resonate with the faculty as a practice they would want to improve because it is both important and currently not routinely utilized or not strongly implemented.

**Step 2:** Determine the status of the practice across the faculty. For example, you could determine that the practice is: (a) widely understood and practiced with high fidelity across the faculty; (b) acknowledged as important, but not practiced with high fidelity across the faculty; or (c) not well understood and only sporadically practiced. The team's consensus judgment is sufficient for purposes of this activity.

**Step 3:** List ways for each of you and then for the rest of the faculty to (a) better understand the practice and what it looks like when carried out with high quality, and (b) how specifically to both elevate the quality with which it is carried out at your school and extend its use across the faculty.

**Step 4:** Each A-team member pays close attention to this practice in his or her own individual work and looks for it when observing others' work, noting opportunities to elevate performance.

**Step 5:** At subsequent meetings of the A-team, members briefly describe what they each have observed relative to the practice they each have chosen for their focused attention and actions they have taken or recommended to improve the practice at the school.

**Step 6:** A-team members report to the faculty their experience with practice-focused collaboration and discuss ways to make practice-focused collaboration a normative mode of interaction among faculty members, both informally as experienced by the A-team in this activity and more formally as part of team and faculty meeting agendas.

The A-team and the broader faculty select different practices from time to time, giving collective focus to each one, helping each teacher improve his or her use of the practice.

The object of this activity is to model practice-focused collaboration around a specific instructional practice and, by so doing, to take the first step in establishing practice-focused collaboration as a routine manner of daily discourse — to subtly, but significantly begin to change the way people view their work and their relationships with each other. Once practice-focused collaboration has become established as a method of continuous improvement for instruction, it may be carried out very formally or informally. More formally, a team of teachers may employ it to carefully assess the level of need for improving a practice across the faculty, to detail a plan for that improvement, and to track progress. More informally, practice-focused collaboration may be the means by which two or more educators work with each other as colleagues to reflect on and perfect the exercise of their craft.

# Appendix E: Ways Teachers Increase Students' Opportunity to Respond

When observing students in the classroom and noting the extent to which they are engaged in learning, the transformation leader should note which teacher strategies elicit the greatest degree of productive engagement. Another way of thinking about these strategies is as opportunities for students to respond. Those opportunities — and the actual rate of students' responses — are an important metric for understanding learning from the students' perspective. Instructional leaders should note which teacher strategies are most effective and which teachers are employing those strategies; those teachers can then be tapped to share the strategies with other teachers. Describing the specificity with which he and his associates deconstruct instructional strategies, Marzano (2017, p. 7) notes nine ways teachers increase students' response rates:

1. Random names
2. Hand signals
3. Response cards
4. Response chaining
5. Paired response
6. Choral response
7. Wait time
8. Elaborative interrogation
9. Multiple types of questions

Paying attention to the student side of the teaching-learning equation — in classroom observations, interviews with individual students, chats with groups of students, and keen awareness of the students and their lives — will lead the transformational principal to productive changes in policy and practice that might otherwise be overlooked.

## Reference

Marzano, R. J. (2017). *The new art and science of teaching*. Bloomington, IN: Solution Tree.

# Appendix F: Example of Basic Lesson Template

## A. Lesson Definition

**Course:** *Class/Subject/Course Title*

**Grade Level:** *Period # or Grade Level*

**Unit:** *Name of Unit of Which Lesson Is a Part*

**Lesson Name:** *Name of Lesson*

**Day:** *Date*

**Time:** *Total Time of Lesson*

**Standard(s):** *List the **main standard** to which the lesson connects here. Enter the full text of the standard and the numerical representation for the standard.*

**Learning Target(s) (or Objectives):** *"Students will be able to . . ." or "I can . . ."; include the knowledge and/or skill the students will demonstrate within this learning target by the end of the lesson.*

### Expectation(s) of Mastery of Learning Targets

**Conditions:** *List the conditions under which students will be asked to demonstrate their mastery of the lesson's learning target, for example, "on a worksheet with fraction problems" or "in a three-minute presentation to the class."*

**Criteria (Formative Assessment):** *By which criteria will the teacher and the student know that the student has mastered the lesson's objective? For example, 80 percent is used in this example: "On a worksheet with fraction problems, the student will correctly answer 80 percent." In this example, the criteria are the number of components: "In a three-minute presentation to the class, the student will utilize all four components of an expository presentation."*

## B. Lesson Detail

**Time:** *List the Time Allotted for the Specific Mode of Instruction*

**Instructional Mode:** *List/Check the Type of Instructional Mode*

- ☐ **Teacher-Directed Whole Group**
- ☐ **Teacher-Directed Group(s)**
- ☐ **Student-Directed Group(s)**
- ☐ **Guided Practice**
- ☐ **Independent Practice**
- ☐ **Homework**

**Instructional Activities:** *Explain the activities that will occur during the instructional mode. Provide enough detail to guide the teacher through the lesson and explain to a colleague what occurs during the mode.*

**Resources/Materials/Technology:** *List the various resources and/or materials needed to complete this portion of the lesson and any technology that will be used.*

**Accommodations:** *List any accommodations for the lesson that do not change content or skills, only accessibility.*

**Modifications:** *List changes to skills and/or content based on student needs.*

*Source:* Redding, S. (2018). *Instructional design*. Philadelphia, PA: Center on Innovations in Learning at Temple University. Used and adapted with permission. (For this and many other resources, see http://www.centeril.org/)

# Appendix G: Example of Enhanced Lesson Template

## A. Enhanced Lesson Definition

**Course:** *Class/Subject/Course Title*

**Grade Level:** *Period # or Grade Level*

**Unit:** *Name of Unit of Which Lesson Is a Part*

**Lesson Name:** *Name of Lesson*

**Day:** *Date*

**Time:** *Total Time of Lesson*

**Standard(s):** *List the **main standard** to which the lesson connects here. Enter the full text of the standard and the numerical representation for the standard.*

**Learning Target(s) (or Objectives):** *"Students will be able to . . ." or "I can . . ."; include the knowledge and/or skill the students will demonstrate within this learning target by the end of the lesson.*

### Expectation(s) of Mastery of Learning Targets

**Conditions:** *List the conditions under which students will be asked to demonstrate their mastery of the lesson's learning target, for example, "on a worksheet with fraction problems" or "in a three-minute presentation to the class."*

**Criteria (Formative Assessment):** *By which criteria will the teacher and the student know that the student has mastered the lesson's objective? For example, 80 percent is used in this example: "On a worksheet with fraction problems, the student will correctly answer 80 percent." In this example, the criteria are the number of components: "In a three-minute presentation to the class, the student will utilize all four components of an expository presentation."*

## B. Enhanced Lesson Detail

**Time:** *List the Time Allotted for the Specific Mode of Instruction*

**Instructional Mode:** *List/Check the Type of Instructional Mode*

- ☐ **Teacher-Directed Whole Group**
- ☐ **Teacher-Directed Group(s)**
- ☐ **Student-Directed Group(s)**
- ☐ **Guided Practice**
- ☐ **Independent Practice**
- ☐ **Homework**

**Instructional Activities:** *Explain the activities that will occur during the instructional mode. Provide enough detail to guide the teacher through the lesson and explain to a colleague what occurs during the mode.*

**Instructional Mode: Teacher-Directed Whole Group**

**Instructional Mode: Teacher-Directed Group(s) OR Student-Directed Group(s)**

***Enhanced Instructional Activities Group 1***

***Enhanced Instructional Activities Group 3***

***Enhanced Instructional Activities Group 2***

***Enhanced Instructional Activities Group 4***

**Instructional Mode: Guided or Independent Practice OR Homework**

***Enhanced Instructional Activities Prerequisite***

***Enhanced Instructional Activities Accelerated***

***Enhanced Instructional Activities Target***

**Personal Competencies**

| Cognitive | Metacognitive | Motivational | Social/Emotional |
|---|---|---|---|
| ☐ connects to prior learning<br>☐ reinforces memorization<br>☐ builds vocabulary<br>☐ enhances core knowledge (e.g., common facts, ideas, phrases, quotations)<br>☐ includes rich reading, writing<br>☐ amplifies curiosity — exploration/ discovery<br>☐ **Big Strategy** Close Reading | ☐ models thinking strategies<br>☐ requires logic<br>☐ enhances creativity (divergent thinking)<br>☐ includes problem-solving<br>☐ builds self-regulatory abilities<br>☐ includes goal setting<br>☐ requires self-monitoring<br>☐ requires self-appraisal<br>☐ builds self-efficacy<br>☐ reinforces self-management<br>☐ encourages seeking help<br>☐ includes student tracking of mastery<br>☐ **Big Strategy** Student Tracking of Mastery | ☐ promotes a growth mindset<br>☐ stimulates interest in topic<br>☐ includes student choice<br>☐ connects with students' aspirations<br>☐ differentiates and/or personalizes<br>☐ celebrates accomplishments<br>☐ provides high levels of engagement<br>☐ includes clear indicators of progress (feedback)<br>☐ **Big Strategy** Active Student Responding | Includes enhancement of:<br>☐ self-awareness<br>☐ self-management<br>☐ social awareness<br>☐ relationship skills<br>☐ responsible decision-making<br>☐ **Big Strategy** Norming |

**Resources/Materials/Technology:** *List the various resources and/or materials needed to complete this portion of the lesson and any technology that will be used.*

**Accommodations:** *List any accommodations for the lesson that do not change content or skills, only accessibility.*

**Modifications:** *List changes to skills and/or content based on student needs.*

**Accelerated:** *Specify the modified content and assignments to accelerate learning and keep engaged those students who have already demonstrated mastery of the learning objective.*

**Prerequisite:** *Specify the modified content and assignments that will provide students who have not yet mastered the prerequisite skills and/or the content needed for the new lesson objective, assignments and/or homework with the building blocks to achieve the skill and knowledge development that will enable them to ultimately meet the objective.*

*Source:* Redding, S. (2018). *Instructional design*. Philadelphia, PA: Center on Innovations in Learning at Temple University. Used and adapted with permission. (For this and many other resources, see http://www.centeril.org/)

# Appendix H: Mapping the Instructional System (Tool)

**A-Team Activity 2.1: Create a clear description — the map — of your school's instructional system by discussing and addressing targeted questions for each stage and sub-stage in the system. After addressing the question, check whether this item is a strength in the school's instructional system, a weakness, or not present at all.**

In the mapping tool below, questions are organized by the sub-stages of each of the four stages in the instructional system — planning, providing, adjusting, and enhancing. Dedicating a single A-team meeting to addressing all the questions related to one stage is a reasonable pace, with four meetings needed to cover all four stages and, thus, to map the system and prioritize improvements.

## Stage: Planning Instruction

### Alignment Questions

**AL1. Who creates the aligned curriculum? District teams? School teams? Individual teachers? Other?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**AL2. Where does the aligned curriculum reside? In district curriculum guides? School curriculum guides? Other? Online or hard copy or both?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**AL3. When and how often is the aligned curriculum reexamined and revised? By whom?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**AL4. How is the aligned curriculum organized? By subject? Grade level? Course?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**AL5. Who names courses and organizes them into units? District teams? School teams? Individual teachers? Other?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**AL6. How are student learning data used in the alignment process?**

Strong Area ☐ Weak Area ☐ Not Present ☐

## Design Questions

**ID1. Is a standard template used by all teachers for their lesson designs? If yes, describe the template and how it is used.** Strong Area ☐ Weak Area ☐ Not Present ☐

**ID2. Are lessons created by individual teachers or teacher teams? Explain.** Strong Area ☐ Weak Area ☐ Not Present ☐

**ID3. Are lessons shared with all teachers so that good ideas spread? How?** Strong Area ☐ Weak Area ☐ Not Present ☐

**ID4. Do teachers receive feedback on their lesson design? From other teachers? From administrators? Explain.** Strong Area ☐ Weak Area ☐ Not Present ☐

**ID5. How are decisions made about situating individual lessons within a teacher's schedule to create a lesson plan? How is this plan made available for administration (e.g., principal, department head) to review?** Strong Area ☐ Weak Area ☐ Not Present ☐

**ID6. How are student learning data used in designing lessons?** Strong Area ☐ Weak Area ☐ Not Present ☐

## Materials Questions

**IM1. How are funds for *supplemental* materials requested, approved, allocated, budgeted, and accounted for?** Strong Area ☐ Weak Area ☐ Not Present ☐

**IM2. Where are materials stored? Centrally or by each teacher?** Strong Area ☐ Weak Area ☐ Not Present ☐

**IM3. Who creates or otherwise selects and secures the materials? Teams? Individual teachers?** Strong Area ☐ Weak Area ☐ Not Present ☐

**IM4. Are assembled materials marked according to purpose and stored where they can be circulated? By whom?** Strong Area ☐ Weak Area ☐ Not Present ☐

**IM5. How are student learning data used in decisions about creating and adopting materials?** Strong Area ☐ Weak Area ☐ Not Present ☐

## Stage: Providing Instruction

### Classroom Culture Questions

**CC1. Are some classroom rules or norms officially adopted schoolwide? By whom? Explain.** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC2. Do teachers follow common procedures to establish the classroom rules or norms? Describe procedures briefly.** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC3. How are each teacher's *procedures for establishing* classroom rules or norms documented, and how are the final rules and norms made available to administration (e.g., principal, department head)? To students? To parents?** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC4. How are classroom rules and norms taught and reinforced? Included in lesson plans?** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC5. What determines when a student's behavior warrants attention by someone other than the teacher? Who is that someone? What is the process for referral?** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC6. How would you characterize the culture of most classrooms? What descriptors come to mind? Warm? Caring? Orderly? Formal? Active? Engaged? To what extent do your descriptors cover nearly all classrooms?** Strong Area ☐ Weak Area ☐ Not Present ☐

**CC7. What data are tracked regarding student behaviors? By whom? For what purpose?** Strong Area ☐ Weak Area ☐ Not Present ☐

## Delivery Questions

**DI1. To what degree does the lesson template ask for sufficient information to guide how the lesson is conducted? Would a lesson created from the template adequately inform a substitute teacher?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DI2. What are the classroom observation practices in the school? Who observes? How frequently? How are observations documented? How is the resulting information used?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DI3. On average, how many instructional modes (whole class, teacher-directed group; student-directed group; guided practice; independent practice; computer assisted) are used by the school's teachers during a lesson? How many teachers exceed the average?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DI4. How are student learning data used when establishing student groupings? When developing individual assignments?**

Strong Area ☐ Weak Area ☐ Not Present ☐

## Interactions Questions

**IN1. During whole-class instruction, do teachers display a good balance between direct teaching and questioning/ interacting with students?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**IN2. Do teachers use open-ended questioning and encourage students to elaborate in their responses?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**IN3. Do teachers encourage on-topic peer interaction among students? How?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**IN4. Do teachers provide appropriate verbal praise for specific student behaviors and responses?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**IN5. How are data about student interaction and engagement collected? Used?** Strong Area ☐ Weak Area ☐ Not Present ☐

## Stage: Adjusting Instruction

### Peer Feedback Questions

**PF1. At which stages of the instructional system is feedback a formal part of the school's quality assurance?** Strong Area ☐ Weak Area ☐ Not Present ☐

**PF2. At which stages of the instructional system is feedback commonly requested by one teacher of another?** Strong Area ☐ Weak Area ☐ Not Present ☐

**PF3. Is feedback *required* at any stages? Which stages? In what form?** Strong Area ☐ Weak Area ☐ Not Present ☐

**PF4. Are common rubrics, critique forms, or similar templates used to record feedback? Describe.** Strong Area ☐ Weak Area ☐ Not Present ☐

**PF5. How is feedback shared?** Strong Area ☐ Weak Area ☐ Not Present ☐

### Formative Assessment Questions

**FA1. What are the lesson template's requirements for specifying means by which student mastery of lesson objectives is determined?** Strong Area ☐ Weak Area ☐ Not Present ☐

**FA2. Do formative assessment methods include unit pre- and post-tests or similar methods for determining change in student mastery as a result of instruction? Explain.** Strong Area ☐ Weak Area ☐ Not Present ☐

**FA3. Do teacher teams or individual teachers develop formative assessments for lessons and units? What is the process?** Strong Area ☐ Weak Area ☐ Not Present ☐

**FA4. How are formative assessments calibrated with standards? By whom?** Strong Area ☐ Weak Area ☐ Not Present ☐

**FA5. Do teacher teams review formative assessment results to adjust lesson plans? Explain.** Strong Area ☐ Weak Area ☐ Not Present ☐

### Teacher Reflection Questions

**TR1. Do teachers routinely record reflections of lessons taught? How? How frequently?** Strong Area ☐ Weak Area ☐ Not Present ☐

**TR2. Are teachers' reflections shared with other teachers? With teams? How?** Strong Area ☐ Weak Area ☐ Not Present ☐

**TR3. Do teacher reflections follow a template of key points or are they free-form?** Strong Area ☐ Weak Area ☐ Not Present ☐

**TR4. Do teachers review formative assessment data from the lesson before recording reflections?** Strong Area ☐ Weak Area ☐ Not Present ☐

## Stage: Enhancing Instruction

### Differentiation

**DF1. Does the school require a standard methodology, such as UDL or Tomlinson's Differentiated Instruction model (Tomlinson, 2003)? If so, what is required?** Strong Area ☐ Weak Area ☐ Not Present ☐

**DF2. How are lessons enhanced to differentiate? By individual teachers? By teams?** Strong Area ☐ Weak Area ☐ Not Present ☐

**DF3. Are lessons typically enhanced to differentiate when created or later when adjusted?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DF4. Do teachers provide alternative assignments to meet the learning needs of different students? In independent practice? In homework?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DF5. Is guided practice a common technique in the school?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**DF6. How are student learning data used in planning differentiation?**

Strong Area ☐ Weak Area ☐ Not Present ☐

## Personalization Questions

**PE1. How do lesson designs illustrate how the teacher will intentionally strengthen students' learning competencies (i.e., cognitive, metacognitive, motivational, and social/emotional)?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE2. What does "personalization" mean in this school?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE3. How are lessons enhanced to personalize? By individual teachers? By teams?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE4. Are lessons typically enhanced to personalize when created or later when adjusted?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE5. Does personalization include engaging students in the design of their learning paths?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE6. Does personalization include giving students choice in topics or assignments?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE7. Do teachers use technology to personalize? For what purposes?**

Strong Area ☐ Weak Area ☐ Not Present ☐

**PE8. How are student learning data used in planning personalization?**

Strong Area ☐ Weak Area ☐ Not Present ☐

# Appendix I: Faculty Meeting Agenda

**A-Team Activity 2.2: Share your notes from the discussion questions (the map) with the faculty and gather their feedback to revise your descriptions.**

The map of the instructional system reflects the considered impressions of the principal and fellow members of the A-team. The same questions that have guided the A-team's discussion can be used as agendas for subsequent faculty meetings. Engaging the whole faculty in such discussion helps to develop a shared understanding of the system among the faculty and also leads to a more complete map of the system, which can guide next steps.

## Faculty Meeting Agenda

**School Name Here:**

**Meeting Location Here:**

**Date:** **Time:**

**Assigned Roles**

**Facilitator:** *(add team member name)*

**Timekeeper:** *(add team member name)*

**Note Taker:** *(add team member name)*

**Process Observer:** *(add team member name)*

*Faculty Meeting Agenda continues on next page*

| Time | Person Responsible | Agenda Item | Minutes (Summary of Key Points) |
|---|---|---|---|
| 10 minutes | Principal | **Meeting Purpose:** To provide a review of the A-team's conclusions from mapping the instructional system | |
| 20 minutes | Faculty | **Four Stages, Part A:** Group the faculty by the four stages of the instructional system; each group reviews A-team conclusions and confirms or changes rating and adds notes. | |
| 10 minutes | Faculty | **Four Stages, Part B:** Each group summarizes stage notes at their table. | |
| 15 minutes | Faculty | **Table Share:** Each group shares its notes on the stage it reviewed. | |
| 5 minutes | Process Observer | **Report:** Process observer shares observations of meeting proceedings. | |

# Appendix J: Prioritization of Transformation Strategies (Template)

**A-Team Activity 2.3: Review faculty input to map of instructional system, summarize strengths and weakness for each stage, and prioritize strategies for transformation in each stage.**

Once analyzed, the information you have gathered about your school's instructional system will inform action planning in Early Action 4. In activity 2.3, the A-team will summarize the conclusions drawn from discussion of the stages and sub-stages of the instructional system. Which stand out as the school's greatest strengths? Which stages and sub-stages cry out for improvement? Use the template below to document your conclusions.

**Big Conclusions for Planning Instruction**

Our greatest strengths

Our greatest weaknesses

Possible strategies to address weaknesses

**Big Conclusions for Providing Instruction**

Our greatest strengths

Our greatest weaknesses

Possible strategies to address weaknesses

**Big Conclusions for Adjusting Instruction**

Our greatest strengths

Our greatest weaknesses

Possible strategies to address weaknesses

**Big Conclusions for Enhancing Instruction**

Our greatest strengths

Our greatest weaknesses

Possible strategies to address weaknesses

Along with these big conclusions, keep the notes from the team's discussions about each set of questions so the team can refer to them while moving into Early Actions 3 and 4.

# Appendix K: See Through Students' Eyes Observation and Analysis (Tool)

**A-Team Activity 3.1: Draw from your observations and interviews to develop a list of ways to remove barriers and expand opportunities for students at your school.**

In this activity, the A-team will look through students' eyes to try to understand the barriers that may be in the way of students' learning and success in school. In doing so, team members will consider each learning activity they see in a lesson not only as a demonstration of the teacher's intentions, but also as it relates to each student's readiness for the activity, that is, as it relates to the student's personal competencies for learning.

Based on these observations, the A-team will consider ways to remove barriers and open opportunities for students. The team will also introduce the faculty to methods for intentionally building students' personal competencies to produce stronger learners.

In the activity, the A-team members, individually, spend a week observing students in a variety of situations — in classrooms, in hallways, on the playground; individually and in groups — and note their observations in the tool See Through Students' Eyes Observation and Analysis (Template). They come back together to compare notes and consider steps the school could take to remove barriers to students' learning and/or to create new opportunities for learning. These notes will be useful when you develop your action plan in Early Action 4: Set the Course for Change.

## See Through Students' Eyes Observation and Analysis (Template)

Seeing through students' eyes can be an enlightening experience. Applying it to transformational change takes some analytical thought and planning. The template below offers both a journal to record observations (section A) and a "next steps" tool (section B) to draw conclusions and identify how to remove barriers and provide more opportunities for students.

### A. Observing

| Date | Type of Observation<br>*For example: Individual student, group of students, classroom* | Observation |
|---|---|---|
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| | | |

| Date | Type of Observation<br>*For example: Individual student, group of students, classroom* | Observation |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

## B. Drawing Conclusions and Considering Next Steps

| General Conclusions From Observations | Possible Actions and Next Steps | Remove Barrier or Provide Opportunity? (RB or PO) |
|---|---|---|
| | | |
| | | |
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| | | |

The *Four Domains* framework offers a variety of suggestions for removing barriers and providing opportunity. These suggestions might prime your thinking.

1. When students struggle with a certain concept, they could be assigned temporarily to a teacher whose data demonstrate that he or she teaches it well or differently from the students' current teacher(s), placed in a small group for reteaching, or given individualized instruction.
2. Teachers are given time within the school day to conduct analysis and develop plans to address identified student needs. Teachers are also held accountable for doing so and for carrying out the plans they develop for students.
3. Determine whether adjustments and supports are needed to ensure all students have access to the curricula.
4. Track student progress and help students regain lost ground through
    a. academic supports (e.g., tutoring, co-curricular activities, tiered interventions) and
    b. extended learning opportunities (e.g., summer bridge programs, after-school and supplemental educational services, Saturday academies, enrichment programs), credit-recovery programs, and virtual courses.
5. Give students demonstrating sufficient prior mastery access to higher-level assignments and courses.
6. Network with nearby organizations in the community to identify available supports — or to generate new supports — for students.
7. Consider having medical and dental services available on-site on a regular basis.
8. Provide on-site laundry service for families in need.
9. Provide food for students during extended learning sessions and other periods when they are at school outside regular school hours.
10. Recognize student effort and academic mastery.
11. Maintain a positive, encouraging classroom and school culture for students in which students feel safe and supported to share their needs, struggles, and concerns.
12. Programmatically and systematically build students' skills in setting learning goals, managing their learning, and pursuing their goals by charting progress on coursework and toward their postsecondary goals.
13. Inform and engage families in planning and supporting their students' education goals.
14. Provide students and their families with a full explanation of assessment results and interest inventories to help them make the best decisions.
15. Tap community resources and expertise to expand students' understanding of potential careers and education options.

# Appendix L: Lesson Review/ Observation for Personal Competencies (Tool)

**A-Team Activity 3.2: Introduce the faculty to the strategies for building students' personal competencies and help them understand how to embed those strategies in lesson plans.**

When observing students closely in an attempt to see school and, specifically, instruction as the students see it, the A-team members will record their impressions. They will also note behaviors that give clues to students' personal competencies. The Lesson Review/ Observation for Personal Competencies tool provides a more formal way to look at how teachers are building students' personal competencies. The tool can be used in reviewing a lesson design or in observing a class. The tool gives the reviewer or observer "look fors" to call out the teacher's techniques and strategies for enhancing students' personal learning competencies.

Then, in a faculty meeting, the A-team will present a brief introduction to the four personal competencies (explanations of personal competencies in Early Action 3 that can be copied and used with faculty). The A-team will then explain the Lesson Review/Observation tool below. Teachers can use the tool to prepare and critique their own lessons. The tool can also be used when providing peer feedback for lesson designs and in peer observations of classroom teaching.

## Lesson Review/Observation for Personal Competencies

**The lesson design (or the observed lesson) supports these personal competencies (check):**

| ☐ **Cognitive** | ☐ **Metacognitive** | ☐ **Motivational** | ☐ **Social/Emotional** |
|---|---|---|---|
| prior learning that provides organization, associations, and understanding to facilitate new learning | self-regulation of learning and use of learning strategies | engagement and persistence in pursuit of learning goals | sense of self-worth, regard for others, and the emotional ability to set positive goals and make responsible decisions |

**The lesson design (or the observed lesson) specifically includes these teaching techniques or strategies (check):**

| Cognitive | Metacognitive | Motivational | Social/Emotional |
|---|---|---|---|
| ☐ connects to prior learning<br>☐ reinforces memorization<br>☐ builds vocabulary<br>☐ enhances core knowledge (e.g., common facts, ideas, phrases, quotations)<br>☐ includes rich reading, writing<br>☐ amplifies curiosity — exploration/ discovery<br>☐ **Big Strategy** Close Reading | ☐ models thinking strategies<br>☐ requires logic<br>☐ enhances creativity (divergent thinking)<br>☐ includes problem-solving<br>☐ builds self-regulatory abilities<br>☐ includes goal setting<br>☐ requires self-monitoring<br>☐ requires self-appraisal<br>☐ builds self-efficacy<br>☐ reinforces self-management<br>☐ encourages seeking help<br>☐ **Big Strategy** Student Tracking of Mastery | ☐ promotes a growth mindset<br>☐ stimulates interest in topic<br>☐ includes student choice<br>☐ connects with students' aspirations<br>☐ differentiates and/or personalizes<br>☐ celebrates accomplishments<br>☐ provides high levels of engagement<br>☐ includes clear indicators of progress (feedback)<br>☐ **Big Strategy** Active Student Responding | Includes enhancement of:<br>☐ self-awareness<br>☐ self-management<br>☐ social awareness<br>☐ relationship skills<br>☐ responsible decision-making<br>☐ **Big Strategy** Norming |

**Personal competencies are addressed in the lesson by (briefly describe):**

| Cognitive | Metacognitive | Motivational | Social/Emotional |
|---|---|---|---|
| | | | |

**Comments:**

| |
|---|
| |

*Source:* Twyman, J., & Redding, S. (2015). *Personal competencies/personalized learning: Learning plan reflection guide.* Washington, DC: Council of Chief State School Officers. Used and adapted with permission.

# Appendix M: Draft 90-Day Action Plan to Launch Transformation (Template)

**A-Team Activity 4.1**: **Develop a draft 90-day action plan that recommends (a) specific changes in practice that can be implemented within the next 90 days to launch instructional transformation and (b) longer-term changes in the instructional system for possible inclusion in the school's continuous improvement plan.**

Over the past several months, the A-team has examined the school's instructional system to identify how that system is performing and the changes in practice that might strengthen it, enabling more efficient management of the system and helping to ensure that it provides an optimal learning experience for all students. Reviewing what has been learned during this instruction-focused examination, A-team members now identify and use the template in this appendix to document two kinds of actions, or changes in practice: (a) high-priority changes that can be implemented and begin to yield results within the next 90 days and (b) important changes to the instructional system that will take longer to implement (e.g., adoption of a new curriculum or technology). The longer-term recommendations are referred to the school leadership team or the school improvement team for possible inclusion in a continuous improvement plan. The proposed 90-day actions are presented as a draft plan to the full faculty, which weighs in, fleshes out as needed, and ultimately approves a final 90-day action plan.

Before the whole A-team starts generating the draft action plan, the principal needs to consider the following seven questions about managing implementation of the final 90-day action plan.

## Implementation Management

**1. Will another team collaborate with the A-team to manage implementation of the 90-day action plan?**

- ☐ Yes
- ☐ No

**2. If yes, which other team will collaborate with the A-team to manage the implementation?**

- ☐ Leadership Team
- ☐ School Improvement Team
- ☐ Other — Name of Team:

**3. How frequently will the A-team meet for this purpose?**

- ☐ At Least Once a Week
- ☐ Twice a Month
- ☐ Monthly

**4. Will the A-team prepare agendas and minutes for its meetings?**

- ☐ Yes
- ☐ No

**5. Will the A-team include a note taker for these meetings?**

- ☐ Yes
- ☐ No

**6. Will the A-team include a timekeeper for these meetings?**

- ☐ Yes
- ☐ No

**7. Will the A-team include a process observer for these meetings?**

- ☐ Yes
- ☐ No

By now, the A-team has compiled several documents and has consolidated what it learned about the instructional system using the template in Appendix J: Prioritization of Transformation Strategies. All this information and analysis now comes to the fore as the A-team considers each of seven key topic areas represented in the template below and drafts a 90-day action plan to present to the faculty for discussion, revision, and final approval (see appendix N). The topic areas are derived from the Early Actions addressed by the A-team during the jump-start period. One of the key topics — practice-focused collaboration — encourages the A-team to establish structures, routines, and opportunities for faculty and staff to help each other get better at what they do. Four of the topic areas represent the four stages in the instructional system: planning, delivering, adjusting, and enhancing. Finally, two key topics are derived from the A-team's thoughtful consideration of learning and schooling as seen through the eyes of the students.

The draft 90-day action plan should propose quick changes in practice within only two to four topic areas, so there will not be an action for each of the seven. It is also possible that the team will propose more than one change in practice within the same topic area. Ideally, the action plan will include no more than four to six quick changes in different aspects of the instructional system; however, given the goal of accomplishing all action plan changes within 90 days and the varying time requirements associated with different types of changes, a team could also opt to recommend fewer than four changes in its draft action plan.

The template also includes a place to identify longer-term recommendations for changes to the instructional system within each topic area. These latter recommendations (in the form of proposed actions and/or objectives) should not be included in the draft 90-day action plan that will be shared with the full faculty. Instead, once the template has been completed, these longer-term recommendations should be pulled out, put into a separate document, and shared with the appropriate team for consideration as part of the school's continuous improvement plan.

## Draft 90-Day Action Plan Template

### Topic 1: Practice-Focused Collaboration

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Principal Time Study Results From Early Action 1

**1.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**1.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 2: Instructional System — Planning

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Alignment Discussion Notes
- Design Discussion Notes
- Materials Discussion Notes
- Faculty Meeting Minutes
- Prioritized Transformation Strategies

**2.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**2.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 3: Instructional System — Providing

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Classroom Culture Discussion Notes
- Delivery Discussion Notes
- Interaction Discussion Notes
- Faculty Meeting Minutes
- Prioritized Transformation Strategies

**3.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**3.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 4: Instructional System — Adjusting

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Peer Feedback Discussion Notes
- Formative Assessment Discussion Notes
- Teacher Reflection Discussion Notes
- Faculty Meeting Minutes
- Prioritized Transformation Strategies

**4.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**4.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 5: Instructional System — Enhancing

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Differentiation Discussion Notes
- Personalization Discussion Notes
- Faculty Meeting Minutes
- Prioritized Transformation Strategies

**5.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**5.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 6: See Through Students' Eyes, Build Students' Capabilities as Learners

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- Personalization Discussion Notes
- Faculty Meeting Minutes

**6.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**6.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

## Topic 7: See Through Students' Eyes, Remove Barriers and Provide Opportunities

**Information sources for determining highest-priority actions:**

- A-Team Minutes
- See Through Students' Eyes Observation and Analysis
- Faculty Meeting Minutes

**7.A — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**7.B — Quick change in practice to achieve instructional improvement**

Target Date to Be Fully Implemented:

Primary Person Responsible for Leading the Change:

Next Step:

**Recommended changes** to the instructional system that will take more than 90 days. Can also be stated as objectives. Refer for inclusion in school's continuous improvement plan.

# Appendix N: Final 90-Day Action Plan to Launch Transformation (Template)

**A-Team Activity 4.2: Work with the whole faculty to modify the draft 90-day action plan, converting it to a final action plan that is fleshed out in greater detail. With the whole faculty, begin implementing the final plan.**

## Final 90-Day Action Plan Template

*(may have fewer or more than five changes in practices; add or delete rows as needed)*

**Name of School:**

**District:**

**Change in Practice 1:**

| Step # | Target Date | Person Responsible | Resources Needed | Notes |
|---|---|---|---|---|
| **Step 1:** | | | | |
| **Step 2:** | | | | |
| **Step 3:** | | | | |
| **Step 4:** | | | | |
| **Step 5:** | | | | |

**Change in Practice 2:**

| Step # | Target Date | Person Responsible | Resources Needed | Notes |
|---|---|---|---|---|
| Step 1: | | | | |
| Step 2: | | | | |
| Step 3: | | | | |
| Step 4: | | | | |
| Step 5: | | | | |

**Change in Practice 3:**

| Step # | Target Date | Person Responsible | Resources Needed | Notes |
|---|---|---|---|---|
| Step 1: | | | | |
| Step 2: | | | | |
| Step 3: | | | | |
| Step 4: | | | | |
| Step 5: | | | | |

**Change in Practice 4:**

| Step # | Target Date | Person Responsible | Resources Needed | Notes |
|---|---|---|---|---|
| Step 1: | | | | |
| Step 2: | | | | |
| Step 3: | | | | |
| Step 4: | | | | |
| Step 5: | | | | |

**Change in Practice 5:**

| Step # | Target Date | Person Responsible | Resources Needed | Notes |
|---|---|---|---|---|
| Step 1: | | | | |
| Step 2: | | | | |
| Step 3: | | | | |
| Step 4: | | | | |
| Step 5: | | | | |

# Appendix O: Progress Tracking for 90-Day Action Plan (Template)

**A-Team Activity 4.3: Each week, review progress in implementing the final 90-day action plan and complete the entries for that week in the Progress Tracking Form.**

## Progress Tracking Form

*(add or delete rows as needed to map to final action plan)*

**Name of School:**

**District:**

**Last Date of This Report:**

**Change in Practice 1:**

| Step # | Target Date | Completed Yes or No | Notes |
|---|---|---|---|
| Step 1: | | Yes<br>No | |
| Step 2: | | Yes<br>No | |
| Step 3: | | Yes<br>No | |
| Step 4: | | Yes<br>No | |
| Step 5: | | Yes<br>No | |

**Practice has been fully implemented and is routinely employed in the school.** ☐ **Yes**

**Date fully implemented:**

**Change in Practice 2:**

| Step # | Target Date | Completed Yes or No | Notes |
|---|---|---|---|
| Step 1: | | Yes<br>No | |
| Step 2: | | Yes<br>No | |
| Step 3: | | Yes<br>No | |
| Step 4: | | Yes<br>No | |
| Step 5: | | Yes<br>No | |

**Practice has been fully implemented and is routinely employed in the school.** ☐ Yes

**Date fully implemented:**

**Change in Practice 3:**

| Step # | Target Date | Completed Yes or No | Notes |
|---|---|---|---|
| Step 1: | | Yes<br>No | |
| Step 2: | | Yes<br>No | |
| Step 3: | | Yes<br>No | |
| Step 4: | | Yes<br>No | |
| Step 5: | | Yes<br>No | |

**Practice has been fully implemented and is routinely employed in the school.** ☐ Yes

**Date fully implemented:**

**Change in Practice 4:**

| Step # | Target Date | Completed Yes or No | Notes |
|---|---|---|---|
| Step 1: | | Yes<br>No | |
| Step 2: | | Yes<br>No | |
| Step 3: | | Yes<br>No | |
| Step 4: | | Yes<br>No | |
| Step 5: | | Yes<br>No | |

**Practice has been fully implemented and is routinely employed in the school.** ☐ Yes

**Date fully implemented:**

**Change in Practice 5:**

| Step # | Target Date | Completed Yes or No | Notes |
|---|---|---|---|
| Step 1: | | Yes<br>No | |
| Step 2: | | Yes<br>No | |
| Step 3: | | Yes<br>No | |
| Step 4: | | Yes<br>No | |
| Step 5: | | Yes<br>No | |

**Practice has been fully implemented and is routinely employed in the school.** ☐ Yes

**Date fully implemented:**