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Instructional Coaches' Perceptions of the Extent to which Varied Professional Learning  
Experiences Impact their Efficacy

By  
Magdalena Steytler

A Dissertation Submitted to the  
Gardner-Webb University School of Education  
in Partial Fulfillment of Requirements  
for the Degree of Doctor of Education

Gardner-Webb University  
2016

## Approval Page

This dissertation was submitted by Magdalena Steytler under the direction of the persons listed below. It was submitted to the Gardner-Webb University School of Education and approved in partial fulfillment of the requirements for the degree of Doctor of Education at Gardner-Webb University.

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## **Abstract**

Instructional Coaches' Perceptions of the Extent to which Varied Professional Learning Experiences Impact their Efficacy. Steytler, Magdalena, 2016: Dissertation, Gardner-Webb University, Instructional Coach Professional Development/Learning Experiences/Instructional Coach Role/Instructional Coach Skills, Knowledge, Attributes

The purpose of this study was to contribute to the limited body of research on the factors that impact the ability of instructional coaches to be highly effective in their multi-faceted roles. Specifically, the study examined the perceptions of instructional coaches regarding the effectiveness of varied professional learning experiences in addressing their own professional development needs and how instructional coaches interpreted their role and function as well as the knowledge and skills they deemed essential in performing their duties.

This mixed- methods study was conducted in the Piedmont area of North Carolina, it involved three data collection instruments: a survey was administered to 26 instructional coaches, 10 interviews and two focus group discussions were also conducted, each focus group had four participants. The conceptual framework underpinning the study was Mezirow's Transformative Learning Theory and the Literature Review focused on the role of coach, best practices for instructional coaches and the professional development needs of coaches.

All of the coaches reported feeling unprepared for the role, that the first year was a steep learning curve and most learning was on-the-job and/or from other coaches. Other emerging themes included: Coaches had no clear consistent role description, the role was multifaceted with a wide range of diverse responsibilities, role conflict negatively impacted coaching activities, and the majority of activities did not involve direct, individual coaching. Overwhelmingly coaches described themselves as relationship builders and helpers with several coaches expressing the need to improve their coaching skills and their knowledge of adult learning theory.

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## **Chapter 1: Introduction**

### **Background to the Problem**

The focus of any instructional leader is to improve the quality of instruction and student academic achievement, “If teachers are the most significant factor in student success, and principals are second, then coaches are third” (Fullan & Knight 2011, p. 53). Ever increasing demands on leaders to improve instruction, with several states linking teacher evaluations and salaries to student performance, have led to the need for instructional coaches to support system-wide reform (Fullan & Knight, 2011; Neumerski, 2013). However, the role and function of the instructional coach varies greatly from one district to another (Coggins, Stoddard, & Cutler, 2003; Neumerski, 2013). Without clearly defining the role of instructional coaches, it is challenging for schools to use these leaders effectively (Neumerski, 2013). Furthermore, “There is surprisingly little peer-reviewed research that (1) defines the parameters of the role, (2) describes and contextualizes the work of instructional coaching or (3) explains how individuals learn to be coaches and are supported to refine their practice over time” (Gallucci, De Voogt Van Lare, Yoon, & Boatright, 2010, p. 920). There is no single definition of coaching; coaches even vary in the way they describe themselves (Neumerski, 2013). Aguilar (2013) found that a clearly defined role for the instructional coach or facilitator was uncommon, as reported by instructional coaches themselves. Neumerski (2013) argued that literature on coaching is weak in understanding how leaders improve instruction, there is very little in depth analysis of coaching in literature; coaching behaviors are not examined or defined. Furthermore, as coaching has gained national attention, it has become increasingly problematic. The title instructional facilitator is used in the school district where this study was conducted, but the more common title as found throughout

literature is instructional coach. These two terms may be referred to interchangeably throughout the study.

According to Neumerski (2013) the role of the principal has evolved over time, away from a purely managerial imperative towards that of an instructional leader. “Given the complex demands of reform, leadership that comes from outside of the narrow boundaries of traditional administrator positions is needed to support change across multiple levels of the school system” (Coggins et al., 2003, p. 2). Instructional coaches often fill the role of change agents by facilitating reflective practice, collaboration and problem solving in order to sustain change over time (Steckel, 2009; Stover, Kissel, Haag, & Shoniker, 2011).

Professional development, a key function of an instructional coach, lies at the heart of lasting change. Coaching is an effective means of providing differentiated, teacher-centered, embedded professional development (Stover et al., 2011). “Countries that had gone from great to excellent focused 78% of their interventions on professional development and only 22% on accountability” (Fullan & Knight, 2011, p. 53). Workshops and one-session trainings are not effective in changing instructional practices, but “professional development efforts grounded in situated learning and the normative, re-educative change process would need to be embedded in context, collaborative in nature, and ongoing to sustain growth in teacher learning and create change in instructional practice” (Smith, 2012, p. 3). By providing in-class support, modeling, joint lesson planning, and observations followed by feedback, instructional coaches provide embedded professional development (Poglinco & Bach, 2004).

Instructional coaching roles often involve a delicate balance of mentoring, school improvement, and district-wide professional development (Knight, 2004). According to

Fullan and Knight (2011)

School improvement will fail if coaches remain at the one-on-one level. Coaches are system leaders. They need development as change agents at both the instructional level and at the level of organizational and system change. It is time to recast their role as integral to whole system reform. ( p. 53)

As a result of the lack of collaboration between administration and instructional coaches, along with poor role clarification, instructional coaches are not likely to be used effectively as system wide change agents (Fullan & Knight, 2011). The instructional facilitator or coach model is being used increasingly across the United States to implement organizational change (Gallucci et al., 2010). Historically, this role was frequently related to requirements of the No Child Left Behind (NCLB) Act (Center for Comprehensive School Reform and Improvement [CCSRI], 2007). The increased pressure to improve student achievement has resulted in an increased need for professional development. Often delivered as workshops or quick fixes, which do not result in real and lasting change; instructional coaching is an effective way to provide embedded, individualized professional learning (Knight, 2004).

The level to which instructional coaches are trained in the planning and presentation of effective differentiated professional development programs is under-researched. “There is limited empirical literature that examines instructional coaches’ professional learning” (Gallucci et al., 2010, p. 923). The professional learning experiences that coaches need is clearly dependent on how they are used in schools and even how they define their own roles and functions. In many cases, instructional coaches themselves define the skill sets that are valued as essential for effective coaching (Neumerski, 2013).

## **Statement of the Problem**

Effective teachers are often selected to become instructional facilitators and placed in the role of coach or facilitator with the assumption that they have the skills and abilities necessary for the role (Gallucci et al., 2010). The assumption cannot be made that great teachers will necessarily make great instructional leaders (Neumerski, 2013, Poglinco & Bach, 2004). “Being a master teacher is just one aspect of a coach’s job” (Paglinco & Bach, 2004, p. 400). The research on best practice for the training of coaches and facilitators is limited. Very little is known about the effectiveness of particular programs or which elements are a part of effective training programs (CCSRI, 2007).

Empirical studies have yet to catch up with the recent proliferation of the role in the context of district –wide instructional reform efforts. There is a decided lack of attention in the research literature to how coaches gain the skills necessary to be effective in these relatively new instructional support roles. (Gallucci et al, 2010, p. 921)

**Training.** Instructional facilitators are often left to rely on relationship-building alone to provide a platform for professional development; however, according to Neuman & Cunningham (2009), that is just one aspect of what facilitators need to do to support teacher learning. A study conducted by Coggins et al. (2003) suggested that coaches are not sufficiently trained in facilitation skills associated with instructional coaching. The effectiveness of training programs for coaches and specifically the necessary elements of successful programs has only been evaluated by a small number of researchers (CCSRI, 2007). “Most of what is known about training coaches comes from quasi-experimental and descriptive studies” (CCSRI, 2007, p. 4).

**Role of the instructional coach.** The problem is compounded by the fact that the role and function of the instructional coach varies greatly from one district to another and even among schools within the same district. Gallucci et al. (2010) describe the role of instructional facilitator as multifaceted and ambiguous. The role of an instructional facilitator is open to various interpretations by teachers, principals and central office personnel (Fullan & Knight, 2011; CCSRI, 2007). Teachers are less likely to make optimal use of the support and coaching provided by the instructional facilitator if they do not understand the role clearly (Fullan & Knight, 2011). The skills and activities that form part of a coach's role are described as "ambiguous and contextually dependent" (Gallucci et al., 2010, p. 922). Coaches often resort to allocating their time based on what they understand their focus to be (Deussen, Coskie, Robinson & Autio, 2007). In a study of 190 coaches across five western states, the top priority for three out of the five states was for coaches to spend the majority of their time (60% - 80%) in classes, modeling or co-teaching. However, the actual percentage of time spent on these activities was significantly lower, less than 15%, on average. Although some reasons the percentage of time spent on coaching was so low could have been attributed to coaches having low levels of confidence to model; the way in which coaches defined their roles played a significant role in how they prioritized their time (Deussen et al., 2007).

Another major obstacle in clarifying the role of the instructional facilitator remains the inherent conflict between the roles of coach and evaluator. If these lines are blurred, it renders coaching efforts futile (Tschannen-Moran & Tschannen-Moran, 2011). Instructional coaches, in some districts, routinely conduct classroom walk-through observations. The purpose of these observations is to inform coaching and is not evaluative in nature. In fact, in many instances, the walk-throughs are intended to help

the coach gain a deeper understanding of the professional development needs of each individual teacher in order to structure effective professional development. However, teachers may be leery of accepting involvement from a person who conducted such walk-throughs (Tschannen-Moran & Tschannen-Moran, 2011). In some cases, instructional coaches collect and display data related to these walk-throughs. The data are recorded in an anonymous manner to reflect group trends, but the observation itself is still perceived as evaluative by teachers (Tschannen-Moran & Tschannen-Moran, 2011).

### **Context of the Problem**

The school district in this study was situated in the piedmont area of North Carolina. At the end of the 2015-2016 academic year 20,550 students were enrolled who attended 17 elementary schools (8,986 students), 9 middle schools (4,702 students), and five high schools (6,862). The enrollment numbers include two alternative schools, two early college programs, and one career academy, for a total of 36 schools.

Table 1 shows a breakdown of student enrollment by ethnicity.

Table 1

#### *Breakdown of Enrollment by Ethnicity*

White	African American	Hispanic	Asian American	Other	American Indian
67.04%	14.41%	12.5%	2.78%	3.09%	0.18%

Table 2 provides additional data to describe the district in context.

Table 2

*Descriptive Data*

District statistics	Data
State ranking as measured by end-of-grade, end-of-course, and SAT tests	40 <sup>th</sup>
The graduation rate	86.4%
The dropout rate (2014-15)	2.36%
The student attendance rate	95.29%
The percentage of highly qualified teachers	97.9%

*Note.* 2012-2013 academic year, as the accurate percentage for the 2014-2015 school year was not available from the state due to a change in reporting systems.

The county includes rural, suburban, and urban areas and has a population of approximately 150,000 residents. The district summary data listed above was provided by the Director of testing and student information for the district, upon request by the researcher (Anonymous, personal communication, May 5, 2015).

The district implemented a model of continuous improvement at the time the study was conducted. This model follows a spiral process of ever improving levels of effectiveness through reflective practice referred to as the Plan-Do-Study-Act (PDSA) process. This model was first introduced in 2002 as part of the Baldrige model for continuous improvement, adopted by the school district. Jim Shipley and Associates were hired at the time to provide Performance Excellence training as a result of the poor academic performance of the district. The instructional facilitator model was initially adopted as part of this initiative to ensure the implementation fidelity of Baldrige principles. During the initial phase of implementation, five instructional facilitators were

selected. The model has since expanded to 31 instructional facilitators. The roles and functions have evolved over time to include a much wider range of duties and responsibilities than initially identified. These duties are listed below, and were provided by the school district's Directors of Curriculum Support.

The duties align with and are described in terms of the five core values of the school district. The five core values were: student learning and results focus, motivated faculty and staff, partnerships and teamwork with high ethical standards, continuous improvement and management by fact. The instructional coach responsibilities related to the first core value are to assist teachers to align instructional strategies and assessments to the Common Core State Standards and the North Carolina Essential Standards, provide and model differentiated strategies for instruction, work with small groups of students to close gaps, assist teachers with the implementation of district initiatives and grants to improve academic proficiency such as Response to Intervention (RTI) and grant funding for the introduction of technology into instruction through blended learning models. Responsibilities related to the second core value include: support for beginning teachers and mentors through monthly professional development and ongoing coaching; classroom support and resources to teachers; and identification of individual teacher's strengths and weaknesses through observations, reflections, debriefing and setting goals for improvement. Responsibilities to support the third core value include: supporting and strengthening collaborative teams and Professional Learning Communities (PLCs), coaching and supporting the work of the School Improvement Team (SIT) and goal teams, supporting and facilitating district collaboration among teachers at early release professional development days, identifying and empowering teacher leaders to participate in professional development at school and district level, and collaborating with the



Blended Learning Coach (BLC) to provide training and support for teachers in the implementation of the use of technology in instruction through blended learning models.

In order to support the fourth core value, instructional coaches' duties include:

conducting continuous research on best practice related to current, effective instructional strategies, coaching teachers to become reflective practitioners through the use of the

PDSA process based on the Baldrige model, plan and present quality professional

development to individuals, small groups and whole faculty and support teachers in the

implementation of the School Improvement Plan (SIP) deployment steps. Lastly, in order

to support the fifth core value, coaches assist teachers in the disaggregating and analyzing

of data, support teachers in the development of effective formative assessments and the

use of formative assessment data in decision making for planning and instruction and

assist teachers in the selection and use of diagnostic instruments and resources for the

purpose of identifying specific student gaps and interventions (Anonymous, personal

communication, July 8, 2015). The roles and responsibilities are summarized in Table 3.

Table 3

*The Role and Responsibilities of the Coach as it Relates to the Five Core Values*

Core Value	Coach Role and Responsibilities
Student learning and results focus	<ul style="list-style-type: none"> <li>--Assist teachers to align instructional strategies and assessments to the --Common Core State Standards and the North Carolina Essential Standards</li> <li>--Provide and model differentiated strategies for instruction</li> <li>--Work with small groups of students to close gaps</li> <li>--Assist teachers with the implementation of district initiatives and grants to improve academic proficiency such as RTI and introduction of technology into instruction through blended learning models</li> </ul>
Motivated faculty and staff	<ul style="list-style-type: none"> <li>--Support for beginning teachers and mentors through monthly professional development and ongoing coaching</li> <li>--Providing classroom support and resources to teachers</li> <li>--Working with individual teachers on identifying their strengths and weaknesses through observations, reflections, debriefing and setting goals for improvement</li> </ul>
Partnerships and teamwork with high ethical standards	<ul style="list-style-type: none"> <li>--Supporting and strengthening collaborative teams and PLCs</li> <li>--Coaching and supporting the work of the SIT and goal teams</li> <li>--Supporting and facilitating district collaboration among teachers at early release professional development days</li> <li>--Identifying and empowering teacher leaders to participate in professional development at school and district level Collaborating with the BLC to provide training and support for teaches in the implementation of the use of technology in instruction through blended learning models</li> </ul>
Continuous improvement	<ul style="list-style-type: none"> <li>--Conducting continuous research on best practice related to current, effective instructional strategies</li> <li>--Coaching teachers to become reflective practitioners through the use of the PDSA process based on the Baldrige model</li> <li>--Plan and present quality professional development to individuals, small groups and whole faculty and support teachers in the implementation of the SIP (School Improvement Plan) deployment steps</li> </ul>

(Continued)

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Core Value	Coach Role and Responsibilities
Management by fact	--Assist teachers in the disaggregating and analyzing of data, --Support teachers in the development of effective formative assessments and the use of formative assessment data in decision making for planning and instruction --Assist teachers in the selection and use of diagnostic instruments and resources for the purpose of identifying specific student gaps and interventions

---

### **The Purpose of the Study**

The purpose of the study was to contribute to the limited body of research on the factors that impact the ability of instructional coaches to be highly effective in their multi-faceted roles. Specifically, the study examined the perceptions of instructional coaches regarding the effectiveness of varied professional learning experiences in addressing their own professional development needs. The study also examined how instructional coaches interpreted their role and function in their building and district as well as the knowledge and skills they deemed essential in performing their duties. It was necessary to examine the way that coaches described their role as this had the potential to affect how they prioritized their time and the skills they may value more than others and therefore needed more professional development to improve (Fullan & Knight, 2011). Finally, the relationship between the two areas of investigation was described.

### **Research Questions**

The study sought to determine what the relationship was between the ways that coaches interpret their roles, their perceptions of the function and essential skills sets needed for their roles, and the kinds of professional learning experiences that they perceived as valuable and effective in meeting their needs. The four primary research

questions which provided the framework for this study were:

1. What are instructional coaches' perceptions of their roles within educational settings?
2. What are instructional coaches' perceptions of essential skills needed to fulfill their roles successfully?
3. What types of professional learning experiences do instructional coaches perceive as valuable in meeting their professional development needs?
4. What do instructional coaches perceive as gaps in their own professional development?

### **Theoretical Framework**

The transformative learning theory of Mezirow (1991) formed the theoretical framework of this study. Transformative learning theory developed out of the integration of research and the concepts and theories of several diverse disciplines; developmental and cognitive psychology, psychotherapy, sociology and philosophy (Simmons, 2013). Transformative learning theory holds that adults construct meaning in a rational, cognitive way through experiences based on the past, and learning is influenced by perspectives, beliefs and habits acquired since childhood (Christie, Carey, Robertson & Grainger, 2015).

Transformation and the adoption of new perspectives and behaviors occurs gradually through six stages, characterized across all stages by critical reflection (Cox, 2015).

The stages or core elements of transformation are: self-examination, critical assessment of assumptions, recognizing that discontent and the process of transformation

are shared, exploring options, planning a course of action and reintegrating. These stages closely resemble the process of coaching and the way that teachers and coaches transform their practice (Cox, 2015; Sammut, 2014). Transformative learning theory is integral to adult learning and to coaching as it centers around shifts in thinking (Cox, 2015). The very nature of coaching as described by Cox (2015) to be a “dialectic process that integrates experiences, concepts and observations to facilitate understanding, provide direction and support action and integration” (Cox, 2015, p. 30) focuses on challenging assumptions and existing perspectives. According to Sammut (2014) transformative learning theory closely relates to the goals and processes of coaching. A research study conducted by Sammut (2014) examined the application of transformative learning theory to coaching.

The interview questions were designed to address aspects of the participants’ understanding and knowledge of adult learning: transformative learning: if/how their coaching methodologies help facilitate learning change and transformation; their experiences as a coachee and how their learning experiences influence the coaching environment; coachee readiness; how they foster transformative change; how they engage coaches in difficult moments; how dialog creates ease and flow in the coaching conversation; how they ensure coaching is free of coercion; if coaching facilitates more effective and efficient learning; and if coaching can help adults achieve transformation of perspective. (Sammut, 2014, p. 40)

The research questions and purpose of this study centered around the professional development experiences of instructional coaches and their own learning.

Transformative learning theory was the lens through which the study was conducted.

## **Operational Definitions**

**Co-teaching.** Co-teaching is used to refer to the collaborative instructional strategies used by the classroom teacher and the instructional facilitator in a classroom setting. It implies both persons taking an active part in the delivery of instruction. It may or may not be in the setting where Exceptional Children (EC) are present, but should not be confused with the term as it is applied to the collaboration between a regular education teacher and an EC teacher (Shaffer & Thomas-Brown, 2015).

**Instructional facilitator.** Instructional facilitator is the term used in the school district in which the study will be conducted, however the more common role title is instructional coach, these terms are used interchangeably throughout the study (Gallucci et al., 2010).

**Modeling.** Modeling is used to refer to the instructional facilitator demonstrating instructional strategies to teachers in a classroom setting with students. The teacher observes and may take notes or completes an observation report on specific aspects of the lesson that were agreed upon prior to the modeling (Stover et al., 2011).

**Plan-Do-Study-Act (PDSA).** PDSA is the model of reflective practice implemented throughout all levels of the school district, both instructionally and operationally to ensure continuous improvement.

**Professional development.** Professional development is referred to throughout the study and it is used in a very broad sense to include a wide range of settings and activities such as individual mentoring though feedback on instruction, small group instruction, whole faculty, district level workshops and book studies done with PLCs (Stock & Duncan, 2010).

**Professional learning communities (PLC).** A PLC is a term to describe groups

or teams of individuals who have shared goals and objectives and who plan and collaborate together to achieve the shared goals (DuFour & DuFour, 2012).

**Professional learning experiences.** Professional learning experiences is a broader term than professional development. It includes a wide variety of experiences that contribute to a person's efficacy and may include formal education, mentoring, professional learning communities and on-the-job embedded learning (Stock & Duncan, 2010).

**Site-based or on-site instructional facilitators.** Site-based or on-site instructional facilitators are understood to be a school setting, not a district office. Although instructional facilitators in this study attend regular meetings at the district office once a week, the majority of their time (about 80%) is spent at the school to which they were assigned (Gallucci et al., 2010).

### **Significance**

The aim of most educational reform plans is to provide quality instruction to every child. Ensuring that quality instruction takes place in every classroom is the principal function of an instructional facilitator. Little empirical research exists describing how best to train instructional facilitators to coach or develop differentiated, individual coaching plans for teachers. Lead teachers are often selected for this role with the assumption that they have the coaching skills needed to affect change (Gallucci et al., 2010). In order for change to be lasting, one-day workshops are not an effective method to deliver professional development to teachers. The increased pressure to improve student achievement has resulted in an increased need for professional development, often delivered as workshops or quick fixes which do not result in real and lasting change. Instructional coaching is an effective way to provide embedded, individualized

professional learning (Knight, 2004). Thus, it is important to study the perceptions of the instructional coaches themselves in regards to their roles, their effectiveness, and their needs.

This mixed-methods study examined the perceptions of instructional coaches regarding the types of professional learning experiences that they value as most effective in meeting their professional development needs. The study investigated how instructional facilitators perceive their roles and functions within their districts, and what skills and knowledge they deem essential in the performing of their duties. The results of this study could be considered when developing professional learning activities to meet the needs of instructional coaches. Results from this study may add to the body of knowledge and be useful to school districts and academic institutions in the development of programs specifically designed to teach effective coaching skills and strategies.

### **Summary**

This dissertation consists of five chapters; the first chapter outlines the nature of the problem; its background, context and theoretical framework. The first chapter also clarifies the purpose and significance of the study, operational definitions and identifies the research questions.

The second chapter provides an overview of literature available on the role and function of instructional facilitators and the various aspects of the duties they perform. The skills and knowledge that instructional facilitators need in order to increase their effectiveness as well as the factors that positively or negatively impact their effectiveness was examined.

A detailed description of the methods that were used to conduct the study is the focus of the third chapter. The methods that were used to collect data, select participants



and develop the instruments that were used to conduct the study is be described.

The fourth chapter contains the findings of the study. The data was summarized, analyzed and patterns, common themes and trends were identified. The findings were described in terms of the research questions they were designed to address.

The final chapter is an interpretation of the findings; the conclusions that were made from the findings, how the findings relate to the research questions, the original statement of the problem and the conceptual framework on which the study was designed. Suggestions for practice, recommendations for future study and limitation of the study is outlined.

## **Chapter 2: Literature Review**

### **Introduction**

Coaching, as a central professional development strategy has been adopted by school districts across the nation to support successful reforms (CCSRI, 2007). However, coaching is only successful in achieving district reform goals under certain conditions, when the correct drivers are in place (Fullan & Knight, 2011). Added to this problem is the lack of research available on how coaches gain coaching skills. Coaches often do not receive coaching themselves on how to overcome cultural norms and other obstacles, and define their own roles as they go along (Gallucci et al., 2010). This study will seek to determine instructional facilitators' perceptions of their roles, their needs, and on the effectiveness of professional learning experiences in building their own capacity.

### **Historical Origins**

U.S. schools have had both elements of strong bureaucratic organizations as well as elements of professional organizations, including special supervisors and inspection committees, from as early as the 18th century (Tschannen-Moran & Tschannen-Moran, 2011). In the late 20th and early 21st centuries, the coach reappeared as a support and special supervisor to facilitate the improvement of instruction in schools (Tschannen-Moran & Tschannen-Moran, 2011). In the early 1980s, instructional coaching was developed to support teachers to meet more stringent standards (Neumerski, 2013). The wide-spread introduction of coaches coincided with the accountability movement that swept the nation, which placed pressure on districts to improve academic proficiency across all subgroups of students (Stock & Duncan, 2010).

NCLB (No Child Left Behind) Act requires districts to develop and implement a school improvement plan that includes professional development programs for

teachers at schools that fail to make adequate yearly progress (AYP) for two years or more. Specifically, NCLB requires that these professional development programs incorporate activities, like coaching, that are provided consistently over time. (CCSRI, 2007, p. 1)

Many school districts responded to this act by increasing professional development and using on-site coaches or facilitators (Stichter, Lewis, Richter, Johnson & Bradley, 2006). Coaching is often the centerpiece of literacy reform (Marsh, McCombs & Martorell, 2012). In addition, in several school districts, it has been accompanied by calls for increased funding for additional personnel. In the case of Campbell County School District vs. State in 1997, a substantial increase in funding was awarded to the school district for the purpose of professional development and the addition of school-based instructional facilitators (Stock & Duncan, 2010).

Coaching is an emerging field. The role of the coach or facilitator has evolved into a multifaceted one, and the position often includes duties in a leadership capacity (Gallucci et al., 2010; Aguilar 2013). Aguilar (2013) pointed out that focusing on accountability measures alone and enforcing punitive measures for not making AYP has not been successful in affecting educational transformation. She argued that coaching is at the heart of lasting reform.

Ten years have passed since NCLB went into effect, and this method has not worked. The “achievement gap” remains, and there have been many devastating side effects to NCLB, such as the narrowing of curriculum, the time and focus dedicated to test preparation, and the increase in rote learning. Coaching must be contextualized within a broader conversation to “reform”, save or transform public education. As such, coaching – as a method and theory – is a political

stance. (Aguilar, 2013, p. 5)

### **Site-Based Coaches**

Marsh et al. (2012), defined on-site coaches as “school based, collaborative, and conducted [in] one on one or in small groups” (Marsh et al., 2012, p. 876). They continued, “coaches generally serve in a non-evaluative, support role for teachers and do not directly instruct or tutor students unless used as a means to model instruction for teachers” (Marsh et al., 2012, p. 876). Marsh et al. (2012) further claimed that changes in instructional practice as a result of one-shot professional development are limited. An on-site coach provides opportunities for feedback, discusses strategies, models, and reflects with teachers which, according to learning theory, improves sustainability of change (Marsh et al., 2012).

In a three-year study conducted by Mangin (2009) involving 20 Midwestern school districts, various factors were identified that influenced school districts’ decisions on whether to have on-site coaches or not. Three main factors were identified as reasons some districts opted to have instructional coaches: pressure to improve as a result of state and national reform contexts, identified need for coaching due to low student performance data, and exposure to coaching through existing roles and programs (Mangin, 2009). “Literacy coaches were more likely to be added to a school district if teachers had been exposed to coaching practices as a result of other roles and programs in their schools” (Mangin, 2009, p. 1). Coaches may function as a crucial part of an overall strategy to change systems. Fullan and Knight (2011) stated, “Without coaching, many comprehensive reform efforts will fall short of real improvement” (p. 50). However, organizational reform is dependent upon the correct drivers being in place; capacity building, teamwork, pedagogy, and systemic reform as opposed to accountability,

individual teacher development, technology and piecemeal reform (Fullan & Knight, 2011).

### **The Role of the Coach or Facilitator**

In a study conducted by Dorman (2009) in a central Florida school district, three key functions of the coach were identified; professional development, coaching, and instructional support. The first key function, professional development, included whole faculty professional development, small group professional development, planning professional development, and personal knowledge building. The second key function, coaching, included modeling lessons, co-teaching, and coach-teacher conferences. The third component, support, included student assessment, data reporting, data analysis, meeting, and managing materials (Dorman, 2009). The primary function of an instructional facilitator, in this study, was identified as that of coach. Stover et al. (2011) define coaching as “A form of professional development we believe honors a differentiated approach to meet the diverse needs of teachers” (p. 498) and “embedded professional development focused on reflection” (p. 500).

Smith (2009) identified two major areas into which most of the responsibilities of a coach can be divided; teacher mentoring and program advocacy. The first major area, mentoring, would include activities such as conversations with individual teachers, observations of lessons, assistance with planning, building relationships with teachers, setting of individual goals, attending conferences and district meetings to deepen their own knowledge (Smith, 2009). The second major area would include working at the school level to encourage teacher change through professional development (individuals, small groups or large groups), setting goals and debriefing with teachers on the implementation of new skills, facilitating the development of teacher collaboration, and

developing teacher leaders to share best practices (Smith, 2009). Although the terms coaching and mentoring are closely related, there is a clear distinction between the two (Stock & Duncan, 2010).

The role of the instructional facilitator or coach is more than that of a mentor as it involves several activities that are not typically found in mentoring programs (Stock & Duncan, 2010). “Instructional coaching is different from mentoring in that coaching often involves an instructional modeling and feedback loop that may or may not be present in a typical mentoring program” (Stock & Duncan, 2010, p. 59). Mentoring that lacks a specific, targeted support runs the risk of becoming a buddy system, which has very little impact on teacher effectiveness (Stock & Duncan, 2010). Gallucci et al. (2010) defined instructional coaching as embedded, situated work that includes observations, modeling, and cycles of pre- and post-conferences in a non-supervisory role. Coaching roles often involve a delicate balance of mentoring, coaching, whole-school improvement and system-wide professional development (Knight, 2004).

Gallucci et al. (2010) described the role of instructional facilitator or coach as multifaceted, ambiguous and contextually dependent. Coaches have a huge set of varied responsibilities and the complexity of the roles they have to fill may fragment the coaching process (Smith, 2009). In order to perform the complex role of coach and maintain the delicate balance described by Knight (2004), instructional facilitators need several skills including communication, relationship building, change management, and leadership for teacher professional development (Gallucci et al. 2010). Aguilar (2013) described coaching as an art with the power to transform to “completely change the substance, appearance and even essence of one thing into another” (Aguilar, 2013, p. xiii). The process of trying to transform others can be ambiguous and uncomfortable, as

the end result is often unclear (Aguilar, 2013). Certain skills, talents, and attributes are essential to mastering this art.

An effective coach must possess certain analytical capacities and an ability to think sequentially. Coaching like creating art, requires intuitive capacities and an ability to see something that is not yet – but could be – in existence, and the willingness to surrender to the process and trust that a worthwhile product will emerge. (Aguilar, 2013, p. xii)

It is equally important when defining the instructional coach role to be aware of what coaching is not. Coaching is not a way to enforce a program, a way of fixing people, not a form of therapy, and lastly, not a type of consulting (Aguilar, 2013).

### **Best Practice for Effective Instructional Coaching**

In a study conducted of 35 teachers who had worked with a coach for three years in a South Carolina Reading Initiative, Vanderburgh and Stevens (2009) reported that coaches should focus on specific changes they want teachers to make in their practices. Three coach actions that led to change were identified as:

1. Creating ways for teachers to collaborate; stimulating professional conversations, sharing strategies, discussing issues with individual students, talking about tensions and triumphs and bouncing ideas off one another.
2. Providing on-going support; establishing study groups, providing a comfortable platform for asking questions and seeking advice, observing and modeling lessons, helping teachers to plan lessons, organizing the classroom space, creating individualized teacher coaching plans, working with students and providing support in parent/teacher conferences
3. Teaching research-based practices; reading and discussing current literature on

educational practices and trends, reviewing and discussing the new knowledge to find ways to implement strategies (Vanderburg & Stephens, 2009)

**Reflective practice.** An essential aspect of effective coaching is to facilitate the development of reflective practice. Stover et al. (2011) proposes the notion that one-day staff development workshops are not effective in stimulating complex and meaningful changes in teacher practice. They suggest that observations, coaching conversations, feedback and reflections about beliefs, attitudes and the effectiveness of current practices are far more likely to result in lasting changes. Reflective practice is not a new concept. It was introduced by Dewey in 1933, but it is not something all teachers automatically do (Stover et al., 2011). When the instructional coach facilitates the teacher acknowledgement of his or her own practice, and facilitates an understanding of presented data, it is more likely to result in change (Stover et al., 2011). Obara and Sloan (2009) argued that it is a primary function of a coach to develop in teachers the habits of self- assessment, calling on colleagues for ideas and feedback, and searching for more effective instructional strategies.

**Data driven decision-making.** A key component of instructional best practice is the use of data driven decision-making. “We make use of qualitative and quantitative data to form the basis for the professional development –and the goal of improved student achievement- that we create and facilitate” (Martin & Taylor, 2009). With increased demands on standards-based accountability the amount of data available to teachers has increased. Marsh et al. (2012) highlighted the importance of providing training to teachers in the effective use of data. Coaches are regularly used to instruct teachers in the effective use of available data to inform decision making (Marsh et al., 2012). Data analysis coaching is most effectively done in one-on-one settings or small groups of job-



alike teachers, guided by very specific questions about what the data indicates (Martin & Taylor, 2009).

Martin and Taylor (2009) further suggested that coaches avoid giving teachers the solutions to addressing gap areas indicated by the data. Instead, it is important to allow teachers to develop their own solutions and strategies, which can be achieved through the Socratic dialogical approach (Martin & Taylor, 2009). The coach can support the teacher through this process by providing resources, the latest research on the topic, or facilitate teacher brainstorming (Hanson, 2011). Ultimately, however, “it is the teachers who make meaning on his or her own based on the reality of his or her classroom context” (Martin & Taylor, 2009).

Another helpful data resource for coaches to use as a conversation starter with teachers is the data gathered from classroom walk-throughs (CWT; Hanson, 2011). “Walk-throughs are a way of getting in classrooms regularly for approximately ten minutes to observe instruction. The process is not evaluative but is a way to notice trends in the school” (Hanson, 2011, p. 78). The data gathered during CWTs can be used to select research-based best instructional practices to include in professional development or one-on-one coaching (Martin & Taylor, 2009).

From the instructional coach’s perspective, it is also useful to collect data in the form of a log to document their interactions with teachers. This log can help facilitate reflection and provide insight into adjustments and improvements they may want to make going forward (Bean & DeFord, 2007).

**Strengthening professional learning communities.** The coach plays a vital role in the creation and strengthening of PLCs, a platform through which coaches can provide yearlong, sustained professional development (Hanson, 2011). The members of the PLC,

together with the instructional coach, select strategies for implementation, and the members hold each other accountable for implementation, reflection, and feedback on a regular basis within a structured framework of cooperation, where members have assigned roles and responsibilities (Hanson, 2011). In a study of the Wyoming's Instructional Facilitator program, Rush and Young (2011) found that teachers all reported that they participated in collaborative meetings. Although all teachers did not receive the same level and amount of one-on-one coaching, the meetings provided an opportunity to receive support. They reported that instructional facilitators were overloaded, and the amount of coaching they were able to provide was insufficient. In order to affect reform and increase collaboration within PLCs, coaches and instructional facilitators need to play an active role in classrooms and collaborative meetings (Rush & Young, 2011).

Martin and Taylor (2009) suggested that coaches facilitate the PLC meetings and assist teachers with the developing of meeting agendas and collaborative activities. The use of data and setting of SMART goals (specific, measurable, achievable, realistic, timely) is a key component of effective PLCs (Hanson, 2011). PLCs offer teachers an opportunity to put their minds together to solve problems and to promote their collective understanding of ways to address gaps (Martin & Taylor, 2009). During PLC meetings, teachers are also able to “connect to a larger conversation” (Martin & Taylor, 2009, p. 2) with administrators. Collaborative professional development can be designed around specific problem areas, which are identified by the members of the group (Martin & Taylor, 2009).

**Building trusting relationships.** Schools operate on principles that contain aspects of both bureaucratic and professional organizations (Tschannen-Moran & Tschannen-Moran, 2011). If too much emphasis is placed on bureaucratic elements,

“rules replace trust” (Tschannen-Moran & Tschannen-Moran, 20011). Professional organizations are characterized by shared norms, collective inquiry and a move toward professionalized autonomy (Tschannen-Moran & Tschannen-Moran, 20011, Pugh & Hickson, 2007). A real challenge to a coach or facilitator is to create a space for open, honest and trustful conversations to take place (Martin & Taylor, 2009). Bean and DeFord (2012) suggested working to establish a relationship of trust at the start and avoiding a mindset of wanting to fix things up. “This fix-it approach breeds fear, resentment and resistance; coaches who find themselves in this predicament have a difficult time working as a colleague with teachers” (Bean & DeFord, 2012, p. 2). In order for new learning to take place and new strategies to be implemented, risk taking is key (Martin & Taylor, 2009). Teachers are far more likely to be willing to take risks and try new approaches in a relaxed learning atmosphere (Vanderburg & Stephens, 2009).

With the help of their literacy coach in study group sessions, the teachers felt they could talk about their tensions and triumphs. These teachers now had a place to voice their concerns, a place to celebrate their accomplishments. By having a space to bounce ideas off of, these teachers further developed their professional voice. (Vanderburg & Stephens, 2009, p. 3)

It is important for the coach or facilitator to create a climate of mutual respect Teachers should not be unduly challenged. Coaches should be aware of feelings of vulnerability when teachers are critiqued (Steckel, 2009). Especially when data are discussed, conversations should be constructive and focus on what actions should be taken and what support can be provided (Martin & Taylor, 2009).

Bean and DeFord (2012) suggested ways in which to build trusting relationships:

1. Listen carefully – the coach should try to understand the questions and

concerns of teachers and value their thoughts and opinions.

2. Maintain confidentiality – coaches should not discuss and compare teachers with one another as it will break down the trust for teachers to have open discussions. This includes the sharing of personal concerns that teachers raise with administration.
3. Start with teachers who show willingness to work with a coach – more reluctant teachers will trust only after they see it works with peers.
4. Teacher directed interactions – the coach should allow the teacher to set their own goals and let the teachers’ needs guide the interactions.
5. A positive mindset – coaches should refrain from judgment, focus on accomplishments, and give affirmations.
6. Follow-through – the coach should check in with the teacher on their progress and not promise support that is not given. (Bean & DeFord, 2012)

**Collaboration between the coach, staff, and the principal.** The relationship between the instructional facilitator or coach and the principal has a direct impact on the effectiveness of coaching (Dean, Dyal, Wright, Carpenter & Austin, 2012; Stevens, 2011). A cohesive, collaborative relationship needs to exist between coach and the principal, “without this cohesiveness, many colleagues could be confused by mixed messages” (Hanson, 2011, p. 80). Stevens (2011) suggested that the principal can show his commitment and support by (a) communicating the role and function of the coach clearly to the teachers, (b) attending in-service trainings (c) demonstrating a commitment to the coaching process, and (d) being visible at meetings and supporting the coach (Stevens, 2011).

A sound relationship with the staff is a key component of effective coaching

(Tschannen-Moran & Tschannen-Moran, 2011). If a good working relationship between the coach and the principal does not exist, it could have a negative impact on staff perceptions of the coach and impede the effectiveness of coaching (Dean et al., 2012). “A lack of collaboration between the principal and the reading coach [caused] a sense of disempowerment...that at times, threatened the professional identities of all involved” (Dean et al., 2012, p. 43). Conversely, the coach needs to support the vision of the principal as well as that of the district (Hanson, 2011).

Hanson (2011) suggested regular communication and weekly meetings in order to understand the expectations of the principal. These meetings could include: feedback from classroom walk-throughs, data analysis, planning for subject level meetings, next steps for professional development, and professional learning communities (Hanson, 2011). Regular meetings and communication also provides an opportunity for both the coach and principal to better understand how to implement the deployment steps of the school improvement plan, which is often poorly understood by both coaches and principals (Fullan & Knight, 2011).

In order to set the stage for a collaborative relationship between the coach and the principal, Bean and DeFord (2012) suggested a clear, written job description. They argued that a coach is not a mini-administrator and conflicting perceptions about the role and function of the coach could be avoided by a detailed job description. “Such a description should be one that is agreed upon district-wide to provide for consistency across all schools; it also promotes support at the district level” (Bean & DeFord, 2012, p.3). Furthermore, it is also important that the district communicates professional development goals and the role of the coach, in order to effect system wide change (Fullan & Knight, 2011).

**Recognizing and appreciating teacher differences.** Coaching is an effective means of providing differentiated professional development (Stover et al., 2011). The needs of each teacher is unique “coaches need to recognize and celebrate differences in teachers. Coaches must be flexible and adjust what they do, depending on needs, interests, and the personalities of teachers” (Bean & DeFord, 2012, p. 3). Some teachers may only want a ‘sounding board’ while others may need direct instruction and want the coach to serve as an expert (Bean & DeFord, 2012). An embedded, teacher-centered approach is an effective means to differentiate and meet the unique needs of every teacher (Stover et al., 2011). Rosemary and Feldman (2009) argued that effective coaches should be knowledgeable enough to scaffold learning opportunities for teachers, adapted to their level of readiness. “The professional learning setting should be organized so that the content can be adapted to address various aspects of the instruction and student needs” (Rosemary & Feldman, 2009).

**The coach recognizing his/her own beliefs and attitudes toward instruction.**

The personal beliefs and attitudes of a coach, toward learning, can influence how they carry out the vision of the school and interact with teachers (Bean & DeFord, 2012). It is important to be aware of one’s own influence on the learning of others. As one grows from novice to expert in any profession, one should reflect more on one’s own learning (Darling-Hammond & Bransford, 2005). The coaches’ own teaching experiences, classroom management styles, use of technology, etc. can act as a filter through which teachers are observed (Bean & DeFord, 2012). “Each coach needs to assess his or her own shift in beliefs and attitudes about teaching and learning as the collaboration across participants deepen” (Bean & DeFord, 2012, p. 3).

**Establishing priorities.** Coaches have many varied duties and responsibilities

which they have to juggle during a set period of time (Bean & DeFord, 2012; Deussen et al., 2007). The skills and activities that form part of a coach's role are described as "ambiguous and contextually dependent" (Gallucci et al., 2010, p. 922). Due to the fact that coaching programs are so varied across the country (CCSRI, 2007) districts often leave the way in which coaches are used up to the principal (Ezarik, 2002).

Deussen et al. (2007) identified four categories of coaches based on how their time was prioritized: (a) data-oriented coaches who spent the majority of their time on data-based interactions such as discussions about assessment needs, academic gaps, interventions etc.; (b) student-oriented coaches who were more likely to work directly with students doing small group instruction in classrooms or providing interventions; (c) managerial coaches who were more involved administratively in tasks such as planning meetings, completing reports, etc.; and (d) teacher-oriented coaches who spent the majority of their time coaching individual teachers or small groups of teachers (Deussen et al., 2007).

**Coaches should sharpen their own skills on an ongoing basis.** Many situations arise where a coach may not know the right answer and may need to be prepared to engage in honest inquiry with teachers (Bean & DeFord, 2012). An openness to not always being the expert, and being willing to learn and develop their own capacity sets a good example to teachers, and allows for greater participation in group problem-solving discussions (Bean & DeFord, 2012).

**Pitfalls to avoid.** Bean and DeFord (2012) identified some pitfalls to avoid in a coaching model:

1. Coaches should not play a role in any formal observations or evaluations of teachers; they should not be part of any pre- or post- observation meetings.

2. Coaches should not adopt the perspective of being the expert, but allow teachers to identify their own areas of improvement.
3. Immediate changes should not be expected but gradual development of instructional quality over time.
4. Low visibility should be avoided; the coach needs to be accessible and participate in several, varied activities throughout the building.
5. The tough issues or difficult conversations should not be avoided, if there are barriers to successful instruction, these should be identified and addressed.
6. Teacher complaints should be seen in perspective and viewed in context of other influencing factors, not taken personally and as a reflection of poor coaching support.

Effective coaching should be viewed as a form of embedded professional development that is differentiated, ongoing, reflective and part of cycles of improvement (Stover et al., 2011). Designing a setting for professional development is a crucial factor in achieving instructional outcomes. According to Rosemary and Feldman (2009), careful and intentional planning of all the elements of the setting: place, time, participants, activities, content, and resources should take place in order to ensure ongoing collaboration and ultimately change.

In well-designed settings, participants collaborate in setting goals, engaging in meaningful activity, and assisting one another in achieving them. In well-designed settings participants reflect on students' and teachers' learning through close analysis of evidence which they use to improve teaching. Coaches and teachers work in cycles of examining data, establishing goals, evaluating reflecting and revising. (Rosemary & Feldman, 2009, p. 2)



## **Levels of Coaching**

Denton and Hasbrouck (2009) identified three distinctive levels of intensity of activities in which coaches may engage. The first level was the least intensive and informal in nature characterized by relationship-building activities. The second level was more intense and formal; examples of activities included co-planning and assistance with data analysis. The third level was the most formal: such as co-teaching, modeling lessons, observing lessons and providing feedback. “The most formal and intense [level] includes activities that may be stressful for both the coach and the teacher” (Denton & Hasbrouck, 2009, p.156).

## **The Instructional Facilitator or Coach as a Change Agent**

The ultimate goal of the coach or instructional facilitator should be school-wide or district wide reform or change. Although a differentiated approach to coaching is recommended in literature, individual teacher change should not be a driver (Fullan & Knight, 2011). The effective coach or facilitator should have the added ability to implement district mandates, school improvement goals, and individual teacher goals into an integrated whole (Fullan & Knight, 2011).

A key role of coach is that of change agent and effectiveness should be measured in terms of reaching organizational goals. Individual coaching should align with organizational and system wide vision. School improvement will fail if the work of coaches remains at the one-on-one level. Coaches are system leaders. They need development as change agents at both the instructional level and at the level of organizational and system change. It’s time to recast their role as integral to whole system reform. (Fullan & Knight, 2011, p. 53)

The purpose for employing an instructional coach varies from district to district.

Some may target the entire district in continuous improvement models, while others target only certain low performing schools (CCSRI, 2007). The different identified needs and available resources of school districts also impact how widely the coach model is utilized. These differences account for the inconsistency in the qualifications that states and districts require coaches to have (CCSRI, 2007). Fullan and Knight (2011), argued that all schools in a district should be part of a coaching model and be regarded as a single system. “Changing one school at a time is no longer an option for countries that want to compete internationally” (Fullan & Knight, 2011, p. 51). They continue, “Good coaching gets results – and it gets them fairly quickly. However, ‘good coaching’ is not the reality for many coaches who operate in systems that are not organized to create, develop and sustain the conditions for instructional improvement” (Fullan & Knight, 2011, p. 50).

Coaching is considered to be an effective way to implement reform initiatives. According to Steckel (2009) “There is a strong expectation that embedded professional development characterized by opportunities for collaboration will improve instructional practices and student achievement across academic content areas. This may explain why coaching has come to be considered such a promising element of school reform” (Steckel, 2009, p. 14). In order to affect change and improve the quality of instruction, district-wide goals need to be identified and communicated, parameters and indicators for success need to be identified, and coaches need to be provided with the training and professional development required to perform their functions as change agents (Fullan & Knight, 2011).

### **Role Conflict**

There are conflicting views in the literature regarding the role of coach as an

instructional leader in the school. Neumerski (2013) pointed out that the instructional leadership in the school does not reside solely on the shoulders of the principal. As a the coach is a member of the school leadership team, Hanson (2011) suggested weekly meetings with the principal to discuss feedback from classroom walk-through observations and to plan coaching and professional development for the teachers that need it. In contrast, Bean and DeFord (2012) argued, “coaches should not be writing a formal assessment of what they have seen in the classroom, nor should they be reporting to administrators what they have seen in individual classrooms” (Bean & DeFord, 2012, p. 4).

The data gathered during classroom walk-throughs is very helpful to the coach in identifying trends throughout the school and keeping abreast of potential problem areas, as well as providing an opportunity to check-in with teachers (Hanson, 2011). However, even if the coach does not perceive him/herself to have an evaluative role, some teachers still report being uncomfortable with the coach in the room, as they feel they are being evaluated (Obara & Sloan, 2009). Stover et al. (2011) described the teacher-coach relationship as delicate; “Coaches who enter classrooms wanting to make big changes must do so without evaluation” (p. 500). Some administrators may set improvement goals in the light of teacher observations conducted by coaches, which blurs the line between evaluation and professional development (Tschannen-Moran & Tschannen-Moran, 2011). This goal setting could lead to negative consequences: teachers ignoring mandated improvement goals or power struggles, rather than cooperation (Tschannen-Moran & Tschannen-Moran, 2011). “Evaluation is not a prelude to development, and development is not a consequence of evaluation” (Tschannen-Moran & Tschannen-Moran, 2011, p. 11). Evaluations break down the relationship of trust that teachers need

to have with the coach; trust is essential to learning and risk taking (Stover et al., 2011).

### **Improving the School Culture**

Effective coaching should bring about positive changes not only to the quality of instruction, but also an improvement in the school culture, increased collegiality, collaboration between teachers, and positive changes regarding teachers' awareness, comprehension, alignment and implementation of state standards (Marsh et al., 2012). New leadership roles are needed for reform to take place. Traditionally the principal operated at a macro level, creating vision, implementing and operationalizing the mission, and ensuring accountability measures were in place (Coggins et al., 2003). Building instructional capacity is only one of many roles a principal has, and reform is a complex process that requires on-going professional development (Marsh, et al., 2012). "Given the complex demands of reform, leadership that comes from outside of the narrow boundaries of traditional 'administrator' positions is needed to support change across multiple levels of the school system" (Coggins et al., 2003, p. 2).

Smith (2012) noted that the empirical-rational approach to affect change; moving in discrete steps from research to change agents, may not be the only way to affect change. The social nature of intelligence and the desire for individuals to participate and direct their own learning relates well to the normative re-educative approach.

Professional development efforts grounded in situated learning and the normative re-educative change process would need to be embedded in context, collaborative in nature, and ongoing, to sustain growth in teacher learning and create change in instructional practice. (Smith, 2012, p. 3)

According to Fullan and Knight (2011), as the coach continues to build capacity with the teachers, he or she eventually reaches a level where peers become change agents

and the process becomes self-perpetuating. “The work of coaches is crucial, because they change the culture of the school as it relates to instructional practice’ (Fullan & Knight, 2011, p. 53). Coaches, who are visible and available to teachers for spontaneous conversations and learning, contribute towards building a positive culture of continuous improvement (Martin & Taylor, 2009).

### **Conceptual Framework**

The transformative learning theory of Mezirow (1991) is the lens through which this study was conducted. Several diverse disciplines; developmental and cognitive psychology, psychotherapy, sociology and philosophy form the basis of transformative learning theory (Simmons, 2013). Mezirow conducted extensive research in a national study of adult learning for the U.S. Department of Education in 1978 (Christie et al., 2015). The basic assumptions and roots of transformative learning theory originate in constructivism, humanism, and critical social theory (Simmons, 2013). Mezirow’s theory “explains how adult learners makes sense or meaning of their experiences, how social and other structures influence the way they construe that experience, and how the dynamics involved in modifying meanings undergo changes when learners find them to be dysfunctional” (Christie et al., 2015, p. 10).

The three basic assumptions that underpin transformative learning theory are constructivism, humanism, and critical social theory. These assumptions are described by Simmons (2013) as follows: Constructivist assumptions are that meaning is developed internally over time. Perspectives are assimilated uncritically and may include distortions, stereotypes and prejudices. Some of the major humanist assumptions are that humans are inherently good, capable of making choices, have unlimited potential for growth, and have the urge for self-actualization. Critical social theory assumptions are

that the dominant ideology in a society becomes the norm by which humans make sense of their experiences (Simmons, 2013).

The stages or core elements of transformation are: self-examination, critical assessment of assumptions, recognizing that discontent and the process of transformation are shared, exploring options, planning a course of action and reintegrating. All of these stages are part of the coaching process (Cox, 2015; Sammut, 2014). Transformative learning theory is integral to adult learning and coaching, as the purpose of coaching is to effect lasting change by transforming instructional practice (Cox, 2015).

### **Summary**

Definitions of coaching vary greatly from district to district, and even school to school (Neumerski, 2013). “No one definition exists, making it challenging for schools to determine the use of these leaders” (Neumerski, 2013, p. 322). In addition, Gallucci et al. (2010) claimed: “There is surprising little peer-reviewed research that (1) defines the parameters of the role, (2) describe and contextualize the work of instructional coaching, or (3) explains how individual learn to be coaches and are supported to refine their practice over time” (p. 920).

The use of instructional coaches remains an effective and efficient way to implement change and improve teacher capacity and instruction (Fullan & Knight, 2011). But more research is needed on defining coaching (Gallucci et al., 2010), describing what good coaches need to do in order to coach effectively (Neumerski, 2013), how the role of the coach as instructional leader should balance the administrative and coaching functions (Neumerski, 2013; Tschannen-Moran & Tschannen-Moran, 2011); and how the principal’s role as instructional leader and the coach’s role as instructional leader should be integrated and defined (Dean et al., 2012).

## Chapter 3: Research Design and Methodology

### Introduction

The instructional facilitator or coach model is being used increasingly across the United States to implement organizational change. Despite this increase, literature is weak on defining the role and function of instructional coaches (Gallucci et al., 2010). The ways in which individuals learn to be coaches and how they should be supported is unexplored in peer-reviewed literature (Coggins et al., 2003; Neumerski 2013). “There is limited empirical literature that examines instructional coaches’ professional learning” (Gallucci et al., 2010, p. 923). The role and function of the instructional facilitator varies greatly from one district to another, and even between schools in the same district, making it challenging for school leaders to determine how to utilize coaches (Neumerski, 2013). Coaches even vary in the way they describe themselves or how they define the skill sets that are valued as essential for effective coaching themselves (Neumerski, 2013).

Effective teachers are often selected to become instructional coaches, but the assumption that great teachers will necessarily make great instructional leaders cannot be made (Gallucci et al., 2010; Neumerski, 2013).

The purpose of this study was to contribute to the growing but limited body of knowledge on the kinds of professional learning experiences that coaches perceive to be effective in meeting their professional development needs. The study sought to examine whether a relationship existed between the ways that instructional facilitators defined their own role and function and the professional learning experiences that they valued or needed. The study furthermore sought to determine the reasons behind those perceptions. In addition, the study sought to identify whether there existed perceived gap areas in the

professional learning experiences of instructional facilitators, and if so, what those gaps areas were. In this chapter the research methodology is outlined. The methodology includes the way the study was conducted, the participants who were involved, the instruments that were used and the process that was used to gather and analyze the data.

### **Methodology**

A mixed methods approach was used in this study. Caruth, 2013 defines the mixed methods approach as “A method of both quantitative and qualitative designs in the same research study” (Caruth, 2013, p. 2). This approach allows for greater depth of insight into the research problem and questions than a quantitative or qualitative study alone (Caruth, 2013). Mixed methods research has become increasingly popular for research problems that need to be both explored and explained (Creswell, 2009).

Creswell (2009) identified six types of mixed methods approaches or models: (a) sequential explanatory strategy, (b) sequential exploratory strategy, (c) sequential transformative strategy, (d) concurrent triangulation strategy, (e) concurrent embedded strategy, and (f) concurrent transformative strategy. This study used the concurrent embedded model, which is used to collect quantitative and qualitative data concurrently during the same phase. However, in this type of study, it is assumed that there will be areas of overlap.

The mixing of the data from the two methods is often to integrate the information and compare one data source with another, typically accomplished in a discussion section of a study. However, the data may also not be compared but reside side by side as two different pictures that provide an overall composite assessment of the problem. This would be the case when the researcher uses this approach to assess different research questions or different levels in an organization.



(Creswell, 2009, p. 214).

Creswell (2009) recommended researchers identify four aspects of the method during the planning phase; timing, weighting, mixing and theorizing. The four aspects are explained in Table 4.

Table 4

*The Four Aspects of the Method*

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The Four Aspects of the Method

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Timing	The qualitative and quantitative data in this study will be collected simultaneously during one phase.
Weighting	Equal weighting will be given to both data sources as the intention is to gain a broader, more in-depth perspective rather than focus on a predominant source.
Mixing	The qualitative data will be transformed into summarized qualitative data, and it will be embedded in the study by identifying reoccurring themes and grouping responses that are similar.
Theorizing	Larger perspectives and the theories of instructional coaching as well as Mezirow's transformative learning theory will form the lens through which to design the data collection methods and guide the kinds of questions that will be asked.

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The value and advantages of a mixed methods approach to research is three-fold: it is able to address confirmatory and exploratory research questions simultaneously; it has the ability to provide stronger inferences; and it allows the opportunity for a greater assortment of divergent and/or complementary views. This approach allowed the researcher to gain a deeper understanding of how instructional facilitators define their own roles and functions, as well as why they valued certain professional learning

experiences more than others. This research method was appropriate since there was the potential for a wide range of interpretations and responses based on the multifaceted and ambiguous nature of coaching itself (Gallucci et al., 2010), as well as the diverse ways in which coaches define their own roles (Neumerski, 2013).

Creswell (2009) identified three advantages to conducting interviews and focus group discussions. These advantages included the following: it is useful when participants cannot be directly observed; it is useful because participants are able to provide historical information, and it is useful because the research questions can be directly addressed by the researcher through the line of questioning. Creswell (2009) recommended four to five probes for group discussions. He also noted that it was important for the researcher to take detailed notes during the discussion in addition to the audio recordings. For example, it is helpful to record participants' reactions or facial expressions that are not captured in an audio recording. Creswell (2009) recommended asking no more than 12 interview questions, starting with an ice breaker type question or a question that helps the researcher to get to know the participant better, and ending with a wrap up question to allow the participant the opportunity to share any other details that might not have come up during questioning.

### **Participants**

All instructional facilitators employed at the North Carolina school district in this study were invited to participate in the study. In all, there were 31 instructional facilitators. The researcher was part of the group of instructional facilitators therefore did not participate in the survey, which left a total of 30 participants. It was anticipated that there might be other factors, such as the timing, duration, pace, and structure of a particular learning experience that could impact instructional coaches' perceptions.

Detailed information of this nature could not be gathered from a survey instrument alone. For this reason, in addition to the survey responses, coaches were approached to participate in either individual interviews, focus groups or both, on a voluntary basis.

**Individual interview participants.** The interviews were audio recorded and transcribed. In order to form a proportional representation of the total 31 instructional facilitators employed by the district, the participants were grouped as follows: A total of ten participants; five elementary school coaches, and five secondary coaches.

**Two groups of focus group participants.** Two focus group discussions were held, one with elementary coaches, and one with secondary coaches. Each focus group consisted of four participants. Two of the coaches, one elementary and one secondary volunteered to participate in both interviews and focus group discussions. These methods were selected in order to gain as many different viewpoints as possible. Participants were selected within the two levels of education (elementary/secondary), as it was anticipated that their might be factors influencing their role that are unique to that level and is not experienced to the same degree at the other level.

## **Instruments**

**Instructional facilitator survey.** There are several survey instruments in the literature that focus on various aspects of coaching, an example is the Local Collaborative Coach Survey, which was used by Coggins et al. (2003) in a study of improving instructional capacity through school-based reform coaches. “The survey examined coaching activities, distribution of time spent on these activities, variation in activities based on school reform variables, and professional background and areas of expertise” (Coggins et al., 2003, p.7). Typically, participants who respond to these kinds of surveys are asked to respond on a Likert-type scale.

The researcher developed a survey instrument specifically for this study, based on the format described above to address the unique research questions of this study (Appendix A). The survey instrument was given to three experts in the field to verify the validity and reliability of the instrument. The three experts included two school principals with several years' experience in the district, and one director at the district office level who had several years' experience as an instructional coach. All three experts had extensive knowledge of the instructional coaching model and experience in conducting academic research. Adjustments were made after receiving feedback responses from them. The feedback included making adjustments to the phrasing of the questions, clarifying certain terms and acronyms and the addition of tasks that relate to the role of the coach. The survey contains 113 items divided into four constructs: demographic and background information (12 items); interpretation of role/ function (52 items); prioritizing perceived essential skills/knowledge (28 items); and evaluating professional learning experiences (21 items). Each section contains items labeled other, where participants were able to add choices not listed on the survey.

**Interview protocol.** The researcher developed an interview protocol (Appendix B). The protocol is a set of 12 interview questions that were asked of the volunteer participants in the sample 10 instructional coaches. The protocol was given to three experts in the field to ensure the validity and reliability. Adjustments were made after receiving feedback. The adjustments were minor and related only to the phrasing of the questions and the clarification of terms used. The questions were open-ended and general in nature. They related to all four research questions and allowed participants to share personal viewpoints and more detailed information than a survey could provide. The researcher was an instructional coach in the district and conducted the interviews with

participants. The purpose was for participants to provide information through individual interviews regarding their role and function as well as their perceptions of the professional learning experiences they have had and the impact it has had on their coaching practice.

**Focus group prompts/talking points.** The researcher facilitated the focus group discussions. The purpose of the focus groups was explained to the participants, prior to facilitating the discussion. The purpose of the focus group was to facilitate free discussion around the topic, however five prompts (Appendix C) were developed to guide the discussion, stimulate conversation, or to redirect the discussion in the event that it digressed too far off topic. Clarifying questions were asked on occasion, based on the responses during individual interviews. New themes emerged from the interviews and focus group discussions that were not evident from the result of the survey.

### **Aligning the Instruments Used to the Research Questions**

The four research questions of this study provided the framework for developing the instruments used to gather both quantitative and qualitative data.

1. What are instructional coaches' perceptions of their roles within educational settings?
2. What are instructional coaches' perceptions of essential skills needed to fulfill their roles successfully?
3. What types of professional learning experiences do instructional coaches perceive as valuable in meeting their professional development needs?
4. What do instructional coaches perceive as gaps in their own professional development?

Table 5 below summarizes how the questions on the survey, interview protocol

and focus group prompts aligned with the four research questions.

Table 5

*Alignment of the Instruments to the Research Questions*

Research question	Survey Questions	Interview Questions	Focus group prompts
1	B 1-52, C 30	1	1, 3, 4, 5
2	A 2-12, C 1-29	2,7	3,4,5
3	D 1-21	3,4,5,6,7,9,11	2,4,5
4		8,9,10,11,12	2,5

### **Procedures**

A mixed methods approach was used for this research study which included a survey, individual interviews with 10 instructional coaches as well as two focus group discussions; one elementary and one secondary group. The researcher obtained permission from the superintendent of the school district to conduct this study. A letter (Appendix D) was given to all participants prior to the commencement of any data gathering, describing the purpose and methodology of the study. Copies of the survey, interview protocol, and focus group discussion prompts were made available to the superintendent prior to the collection of any data.

During a weekly meeting of all instructional facilitators at the district office, all Instructional Facilitators were given access to an electronic survey form to complete. The two directors of curriculum support, who chair the meetings, were approached to allow time for volunteers to take the survey. The survey was anonymous and the demographic questions were of such a nature as not to link any coach to a particular

school. The results of the survey form were collected on a spreadsheet.

The interviews were recorded and the responses transcribed. The duration of interviews was between 18 and 30 minutes. A pilot study of the interview was conducted; the pilot study lasted 23 minutes. Interviews took place at locations convenient to the participants, two of the interviews were conducted virtually and recorded. The interviews were conducted shortly after IRB approval was obtained. The interviewees had the opportunity at the end of each interview to add anything further that they felt was relevant. Two focus group discussions were held, one with each level (elementary/ secondary). The focus group discussions took place at the end of the school year during curriculum review week, as all coaches were gathered at a central venue. The interviews were recorded and transcribed. Participants were given detailed information regarding the study and the purpose of the focus group prior to the start of the discussion.

### **Data Analysis**

The data from the instructional coach survey was processed with data analysis software R-version 3.3 in order to determine measures of central tendency and independent T-test were run to determine differences between the results from elementary and secondary coaches. Measures of central tendency were determined for each of the items on the survey in order to determine which particular aspects of the role of the instructional coaches are indicated as responses with higher or lower mean responses. The same applied to the types of professional learning experiences that were selected by participants as beneficial. Patterns and trends in the data were identified. Higher and lower mean responses of particular items within each construct were identified. The mean responses of the items were compared to the mean for all items as

well as to the data from the two groups of facilitators (elementary, secondary) using a basic ANOVA. Within sections B and C of the survey, items were clustered together in themes in order to relate the findings to the research questions. A set of data analysis questions were developed to use as tools in analyzing the survey results.

Creswell (2009) described the analysis of qualitative data as moving from the specific to the general. “An ongoing process involving continual reflection about the data, asking analytical questions and writing memos throughout the study” (Creswell, 2009, p. 184). Creswell (2009) suggested various strategies and approaches to the analysis of qualitative data. The focus group responses and interview responses for this study were analyzed in a detailed step-by-step process as follows:

1. Interviews were transcribed and the data was arranged into different types which related to different constructs and the research questions.
2. All the transcripts were read through for a general overview and to reflect on the overall meaning, tone, depth etc. and thoughts and insights were recorded.
3. A coding process was used with themes that had already been identified in the literature or the interview questions themselves or themes that emerged during the interviews or focus group discussions. This meant looking for key terms or phrases from the wording of participants and assigning an “in vivo” term.
4. All transcripts were then coded and detailed list of all terms compiled. They were then arranged into groups according to themes/categories that are similar, noting subtle differences and frequency of occurrence.
5. Frequencies for each theme were then recorded and a detailed description of the overall data picture and meaning of the theme created.
6. Themes were then summarized in tables to represent the data.



7. Data summaries and emerging themes were interpreted and discussed.

### **Timeline**

The following timeline, shown in table 6 was proposed for the implementation of this dissertation study prior to the collection of any data.

Table 6

*Proposed Timeline for Completion of the Study*

Week	Proposed activities
1	Make copies of the survey and arrange a date for the survey to be administered.
2	Arrange for survey data to be processed through R-version 3.3 and start interviews.
3	Continue interviews and start recording results from the survey into spreadsheets for entering into R-version 3.3.
4	Continue interviews and start focus group discussions.
5	Process survey results with R-version 3.3, complete T-test and basic ANOVA on survey results. Interviewers start transcribing recordings.
6	Summarize data from survey into written summaries, tables, graphs etc., write detailed descriptions of emerging themes/trends and write a narrative interpretation of the quantitative data. (Chapter 4 of study)
7, 8	Transcribe interviews and focus groups from audio recordings and read through, following the seven steps outlined in data analysis.
9	Summarize transcriptions into written summaries and tables, write detailed descriptions of emerging themes/trends and write a narrative interpretation of the meaning of the quantitative data. (Chapter 4 of study)
11	Complete and edit Chapter 4
12	Start typing Chapter 5
13	Complete Chapter 5
14	Send completed dissertation to study leader for review and then start final editing process.

## **Limitations**

This study was conducted in a rural/suburban school district in North Carolina therefore the findings may not be generalized to other school districts with distinctly different demographics or settings. The model used by this school district is school-based; most schools have a full time, on-site instructional facilitator. Many school districts do not follow this model and coaches are based at the central office, serving multiple schools, therefore some of the findings of this study may not apply to such models of implementation.

A third limitation is the fact that this school district has a unique set of district initiatives and grant programs that constitutes a large portion of the duties of the instructional coaches. These initiatives and programs may impact the data results significantly, which limits the extent to which it can be generalized to other districts.

While the research questions were generalized in nature, with the focus on a wide range of professional development experiences, duties and skills, the instructional facilitators in this study were not subject specialists; the district does not follow the literacy or math coach model at the time the study was conducted. The findings of this study may therefore not apply to coaches who are highly specialized in one subject area. The researcher was an instructional coach in the district, therefore not a subject-specific coach. Personal experience and knowledge may have impacted the analysis and interpretation of the data in certain instances.

Finally, the sample size for this study was relatively small; only one school district was studied as a unique phenomenon. Although this mixed method study included multiple data sources, there are limitations inherent in the use of surveys, interviews and focus group discussions. The likelihood that all participants taking a

survey answer all items accurately and honestly is slim. The same is true for interviews and focus groups. Participants may not give the interview their full attention, may forget some pertinent facts or feel hesitant to express their viewpoints honestly.

### **Summary**

The data collected in this study was used to answer the research questions and in doing so, provide insight into the most effective and impactful ways to provide professional learning experiences to instructional facilitators. The study sought to determine which activities typically take up most of the time of coaches, and how their time is prioritized. The data also provided insight into the skills and knowledge that Instructional coaches deemed essential to the performing of their duties and which professional learning experiences were considered as most beneficial in addressing their professional development needs. The findings were compared to the conceptual framework, the literature review and the original problem statement to identify whether the findings align with the theory. Finally, recommendations were made for ways in which to increase the effectiveness of professional learning experiences in meeting the needs of instructional coaches and suggestions were made for further research.

## **Chapter 4: Results**

The purpose of the study was to contribute to the limited body of research on the factors that impact the ability of instructional coaches to be highly effective in their multi-faceted roles. Specifically, the study examined the perceptions of instructional coaches regarding the effectiveness of varied professional learning experiences in addressing their own professional development needs. The study also examined how instructional coaches interpret their role and function in their building and district as well as the knowledge and skills they deem essential in performing their duties. It was necessary to examine the way coaches described their role, as this description had the potential to frame how they prioritized their time and how they valued some skills more than others. This prioritization had the potential to frame professional development (Fullan & Knight, 2011). Finally, the relationship between the two areas of investigation was described.

### **Findings**

A survey was completed by 26 of the 30 coaches in the district, 11 elementary and 15 secondary coaches (86.7% participation). Interviews were conducted with five elementary coaches and five secondary coaches. In addition, two focus group discussions were conducted, one with elementary coaches and one with secondary coaches. Each focus group had four participants. The survey results, as well as the interviews and focus group results were analyzed and emerging themes identified. In this chapter, these emerging themes are described in detail by type of instrument used, and listed by section of the survey, interview question or focus group prompt.

### **Research Questions**

The purpose of the study was to determine the relationships, if any, among the

ways instructional coaches interpreted their roles, their perceptions of the function and essential skills sets needed for their roles, and the kinds of professional learning experiences they perceived as valuable and effective in meeting their needs. The four primary research questions that provided the framework for this study were:

1. What are instructional coaches' perceptions of their roles within educational settings?
2. What are instructional coaches' perceptions of essential skills needed to fulfill their roles successfully?
3. What types of professional learning experiences do instructional coaches perceive as valuable in meeting their professional development needs?
4. What do instructional coaches perceive as gaps in their own professional development?

### **Overview of Quantitative Results**

In order to conduct an in-depth quantitative analysis of the survey results and interpret the data generated, a set of 11 very specific data analysis questions were developed to analyze the findings. The items in sections B and C of the survey were also grouped together in clusters as they related to similar themes in the research questions and would therefore be more meaningful in the process of identifying patterns and/or correlations. The 12 specific data analysis questions the researcher sought to use as analysis tools are listed below:

**Data Question 1.** What were the mean values of responses for items 1 – 12 in section A (demographic information) to form an overview of participants?

**Data Question 2.** For each of the items 1-52 in section B, what was the mean of the responses (0-8 scale)? How did most participants rate each item? Which items were

rated the highest and which items were rated the lowest? Were there significant differences in how elementary coaches rated items compared to secondary coaches?

**Data Question 3.** By comparing the seven clusters for section B, what were the measures of central tendency for each cluster? Were some clusters rated higher than others overall? What type (group of) tasks take up most of coaches' time?

**Data Question 4.** By examining the responses in the previous question, was there a noticeable difference in how elementary (K-5) coaches and secondary (6-12) coaches responded to question in section B?

**Data Question 5.** Was there any relationship between high ratings (6, 7 or 8 on the scale) or low ratings (3, 4 or 5 on the scale) for a particular cluster in section B and a particular cluster in section C? Did coaches that prioritized their time in a similar way value similar skills/attributes?

**Data Question 6.** What were the measures of central tendency for each individual item in section C (items 1-27)? Which skills, talents and knowledge did coaches rate to be the most and the least important in their role as instructional coach?

**Data Question 7.** Looking at the ratings of items by cluster (1-3) in section C, did one cluster of items rate higher or lower overall as compared to the other two clusters? Was there a particular cluster that rated higher?

**Data Question 8.** For the last item (30) in section C, participants were asked to prioritize the top 6 skills, knowledge and attributes in order to determine what the priorities of most coaches were. Which items had the highest and lowest overall priority? Were these priorities different for elementary and secondary or not? Were there coaches that gave very similar ratings, if so how many?

**Data Question 9.** What were the measures of central tendency for each of the

items in section D (1-23)? Which learning experiences were highly rated (3, 4 or 5) and which had low ratings (1 or 2)?

**Data Question 10.** When looking at the clusters 1-7 in section B (describe your current role), was there a relationship/correlation between the way a particular cluster in section B was rated compared to a particular learning experience in section D (professional learning experiences)?

**Data Question 11.** When looking at the clusters 1-3 in section C (skills, knowledge and attributes) was there any relationship/correlation between how coaches rated a particular cluster in section C compared to items in section D (learning experiences)?

The 11 data analysis questions listed above were used to examine the results of each section of the survey (A – demographic information, B – describe your current role, C – Skills, knowledge and attributes, D – professional learning experiences). The survey can be found in Appendix A.

**Data Question 1.** In order to form an overview of participants, the following data question was asked: In section A of the survey, what were the mean values of responses for items 1 – 12 in section A (demographic information)?

Table 7 shows a demographic summary.

Table 7

*Demographic Overview of the 26 Survey Participants*

Level	N	Mean Education Experience	Mean Coaching Experience	Experience in another district	Age 40+
K-5	11	16 years	5 years	2	7
6-12	15	15 years	3 years	1	6

Most of the coaches (about 62%) who participated in the survey were between ages 30 – 45 years. The average amount of experience in education was about 15 years. Most of the secondary coaches were relatively new to role of coach. More than half the participants (54%) also had experience in roles other than coach or teacher as part of their experience in education,

Table 8

*Qualification and Teaching Recognition*

Level	N	Master's +	NBCT	Admin. license	Teacher of the Year
K-5	11	8	5	4	6
6-12	15	10	2	4	10

More than two thirds (69%) of the coaches had a master's degree and about a third (31%) had administration licenses. Noticeably, 16 out of 26 coaches (62%) were recognized for excellence in the classroom and received Teacher of the Year awards and a total of seven coaches were nationally board certified (26.9)%.



**Data Question 2.** For each of the items 1-52 in section B of the survey: What was the mean of the responses (0-8 scale)? How did most participants rate each item? Which items were rated the highest and which items were rated the lowest? Were there significant differences in how elementary coaches rated items compared to secondary coaches?

The results of section B of the survey relate to the first research question: What are instructional coaches' perceptions of their roles within educational settings? In order to analyze the results from the data in section B (describe your current role), items were clustered together based on six themes. The clusters related to similar groupings in the interview and focus group data analysis.

Table 9 lists the clusters of items grouped together for section B of the survey.

Table 9

*Clustering of Items in Section B of the Survey*

Cluster	Theme	Items
1	Relationship builder/helper	36, 30,
2	Coaching, providing resources, working with teachers and PLCs	1, 2, 3, 4, 9, 11, 12, 17, 18, 21, 25, 26, 32, 41, 44, 45
3	Providing professional development, training, mentoring	13, 14, 23, 31, 35, 43, 47, 48, 50
4	Duties; organizational, logistical, administrative	7, 10, 15, 19, 22, 24, 34, 38, 39, 40, 46, 49, 51
5	Collecting analyzing and interpreting data	8, 27, 28, 29, 33, 42
6	Working with students	5, 6
7	Paperwork related to state or district district initiatives and grants	16, 20, 52

Although some clusters had more items than others, the mean values, not the frequencies of responses, were compared when the data was analyzed, as higher ratings indicated more time spent on those activities. The scale used to rate the items related to the frequency of the actions in the daily round of coaches as follows: Several times a day – 8, once or twice daily – 7, several times per week – 6, once or twice per week – 5, several times per month – 4, once or twice per month – 3, a few times per year – 2, rarely – 1, never – 0.

The measures of central tendency for all the items in section B are listed in Appendix E. The following measures are listed for each item: minimum, first quartile, median, mean, third quartile, and maximum. The data was then further disaggregated into two groups, one table indicating measure of central tendency for each item for elementary coaches (Appendix F) and another table for secondary coaches (Appendix G). It is evident from the data in Appendix E graph that one item stood out as having the highest overall mean value: item 36 (spend time with individual teachers to support/encourage/empathize and build trusting relationships). The item with the lowest overall rating is item 51 (serve as testing coordinator). When analyzing the data in appendices, E, F and G, the items with the top 20 highest mean responses were identified in order to determine which activities take up most of coaches' time.

Table 10 below lists the top 20 items and their mean values of responses.

Table 10

*Top 20 Items in Section B Listed in Order – Highest Mean Responses*

Item	Mean values	
36	Spend time with individual teachers to support/encourage/empathize and build trusting relationships	6.68
18	Provide resources and materials to teachers	5.68
4	Provide coaching feedback, verbal or written	5.76
12	Observe lessons or conduct classroom walk-throughs	5.50
41	Meet with the principal regarding instruction and/or coaching	5.48
47	Assist teachers with technology for instruction (on line resources, programs, applications, school net, home base, canvas etc.)	5.36
2	Support the development of effective PLCs	5.32
1	Assist teachers to plan lessons/modules/activities	5.16
9	Facilitate PLC meetings	5.13
14	Collaborate and plan with the blended learning coach or other specialists	5.04
46	Serve on committees at your school (core team, personal learning team, etc.),	4.84
10	Created agendas for meetings (ex faculty/leadership/goal teams/SIT team, etc.)	4.84
7	Conduct accountability tasks (checking meeting notes, sign in sheets, etc.)	4.83
17	keep a coaching log or reflection journal	4.60
		4.44

(Continued)

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Item	Mean values	
27	Collect school wide data and develop spreadsheets to track and analyze data	4.28
32	Work with teachers to promote greater use and understanding of curriculums	4.28
33	Work with individual teachers or PLCs to analyze student data	4.16
48	Present school based differentiated PD to small groups/PLC teams	4.16
5	Work with small groups of students	4.12
8	Check student progress monitoring folders	3.96

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The activities that take up most of coaches' time were relationship building, working with PLC's providing resources, conducting classroom walk through and providing feedback. Item 36 (spending time with individual teachers to support/encourage/empathize and build trusting relationships) is clearly the highest priority of most coaches. The mean value for this item was 6.86 and the maximum value is 8 which implied that there are coaches involved in this activity several times a day (a score of 8).

In order to determine which activities take up the least amount of coaches' time, the lowest 10 items were identified. They are listed below in table 11, in order from least to greatest mean score for all participants.

Table 11

*Items in Section B Listed in Order – Lowest Mean Responses*

Item	Mean values	
51	Serve as testing coordinator	0.79
50	Present professional development at district/state conferences	1.6
24	Provide support to teachers during parent/teacher conferences	1.8
6	Conduct action research as a means to problem solve	2.08
35	Ensure accountability of mentor/mentee interactions, check logs	2.12
45	Facilitate instructional rounds/peer observations	2.30
49	Assist with the orientation of new students, ex. give tours/select clubs etc.,	2.32
26	Model lessons for teachers to observe	2.40
11	Co-teach lessons with teachers	2.54
31	Facilitate the collaboration between beginning teachers and mentor teachers	2.72

Items 11 (co-teach lessons with teachers) and 26 (model lessons for teachers to observe) were in the bottom ten of activities although these activities are essential components of individual coaching. These results were surprisingly low when compared to the rating of item 4 (providing feedback, verbal or written) which had the fourth highest rating out of all 52 items. It is likely that the frequent feedback was related to classroom walk-throughs observations (item 12) which was rated fifth highest, not individual coaching situations.

When comparing elementary and secondary results of individual items, the trends

were similar for the majority of items. There were, however, some items with significant differences in the way elementary coaches rated them as compared to secondary coaches. When comparing the responses of elementary and secondary coaches, items were identified with mean responses that were the same for elementary and secondary. The items are listed in table 12 below. These items were compared to determine whether these two groups of coaches prioritize their time in similar ways; whether the role of coaching was the same regardless of the level (elementary or secondary).

Table 12

*Items in Section B Rated the Same by Elementary and Secondary Coaches*

Item	Mean values	
4	Provide coaching feedback, verbal, or written	5.76
11	Co-teach lessons with teachers	2.54
12	Observe lessons and conduct classroom walk-throughs	5.50
13	Plan school based professional development activities	3.80
18	Provide resources and materials to teachers	5.68
19	Track the implementation of SIP deployment steps	3.32
21	Assist teachers in the creation of assessments	3.28
31	Facilitate the collaboration between beginning teachers and mentor teachers	2.72
38	Meet with or communicate with parents	3.24
40	Covering classes for teachers who are absent	3.20
46	Present school based differentiated PD to small groups/PLC teams	4.16

These eleven activities accounted for the same amount of time for elementary and secondary coaches. Three of the items (4, 12 and 18) were also rated in the top 10 activities for all coaches; providing coaching feedback, verbal or written, observing lessons and conducting classroom walk-throughs and providing resources and materials to teachers.

There were also marked differences in the way some items were scored by elementary and secondary coaches. The items with a significant difference were identified and are listed in table 13. The mean value for elementary and secondary are listed separately.

Table 13

*Items in Section B Rated Differently by Elementary and Secondary Coaches*

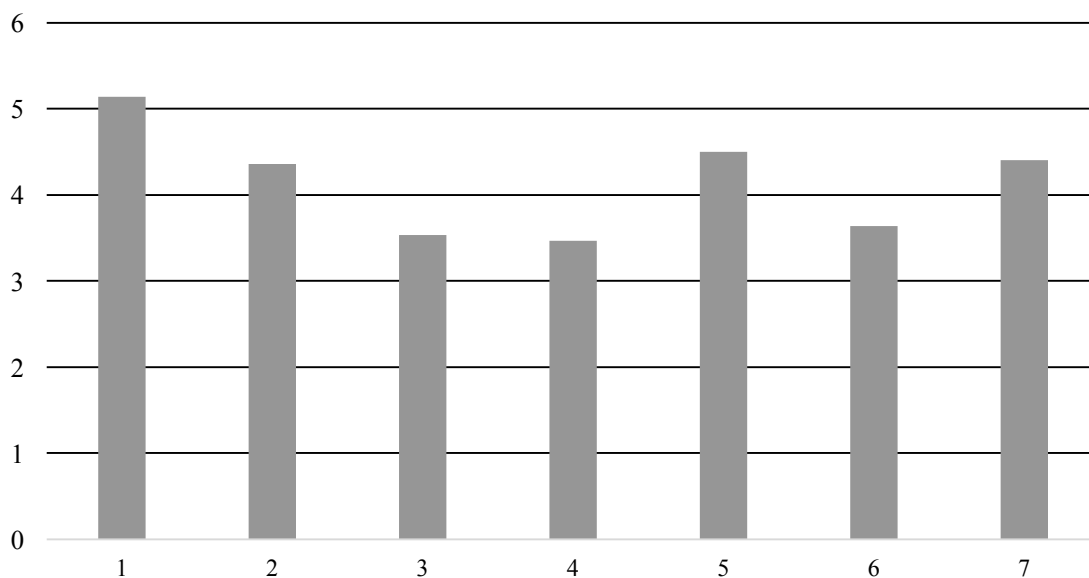
Item	Mean values		
	Elementary	Secondary	
5	Work with small groups of students	5.09	3.36
7	Conduct accountability tasks (checking meeting notes, sign in sheets etc.)	3.73	5.29
8	Check student progress monitoring folders	5.27	2.93
16	Complete paperwork for the referral process of students for IEPs	5.18	1.57
20	Assist teachers of students with tasks related to state requirements; DEPs, personal projects, senior projects, read to achieve materials etc.	4.09	2.43
33	Work with individual teachers or PLCs to analyze student data	5.18	3.36

The greatest difference in rating between elementary and secondary coaches was item 16 (complete paperwork for the referral process of students for IEPs). Secondary coaches, based on the rating scale, were only involved in this activity once or twice a year or rarely, whereas elementary coaches rated that activity as once or twice a week. This difference was substantial. Elementary coaches were also more involved with students directly, in small groups or with checking student progress monitoring folders or completing paperwork associated with state requirements. Secondary coaches, by contrast, reported being more involved with tasks related to accountability, once or twice per week, compared to elementary coaches who reported once or twice/several times per month.

**Data Question 3.** By comparing the seven clusters for section B, what were the measures of central tendency for each cluster? Were some clusters rated higher than others overall? What type (group of) tasks accounted for most of coaches' time?

Figure 1 is a graphic representation of the mean responses for each of the clusters in section B. The items were grouped in clusters as follows: cluster 1 – relationship builder/helper; cluster 2 – coaching, providing resources, working with teachers and PLCs; cluster 3 – providing professional development, training, and mentoring; cluster 4 – duties, organizational, logistical, and administrative; cluster 5 – collecting, analyzing, and interpreting data; cluster 6 – working with students; cluster 7 – paperwork related to state or district initiatives/ grants. The vertical axis indicates the mean values of all the response in the cluster and the horizontal axis lists the numbers of each of the clusters.





1= relationship builder/helper; 2= Coaching, providing resources, working with teachers and PLCs; 3= providing professional development, training, mentoring; 4= duties; organizational, logistical, administrative; 5= Collecting analyzing and interpreting data; 6= working with students; 7= paperwork related to state or district initiatives/grants

*Figure 1. Comparison of the Mean Responses for Each Cluster in Section B*

It is clear that cluster one was rated the highest; coaches spent most of their time on helping teachers and building relationships. In the analysis of section C, later in this chapter, building relationships encouraging, supporting and empathizing with teachers was the skill that was rated as the most important by coaches. The second highest rated cluster, also noticeably higher than all the other clusters, was coaching, providing resources, working with teachers and PLCs.

Table 14 compares the measures of central tendency for each of the clusters (1-7) in section B of the survey with one another in order to obtain an overview of the types of activities coaches indicated as taking up most of their time. The table indicates the numeric differences in the values of the measures of central tendency for each cluster. The mean values are listed in the fifth column of Table 11 below.

Table 14

*Measures of Central Tendency for Section B Clusters – All Responses*

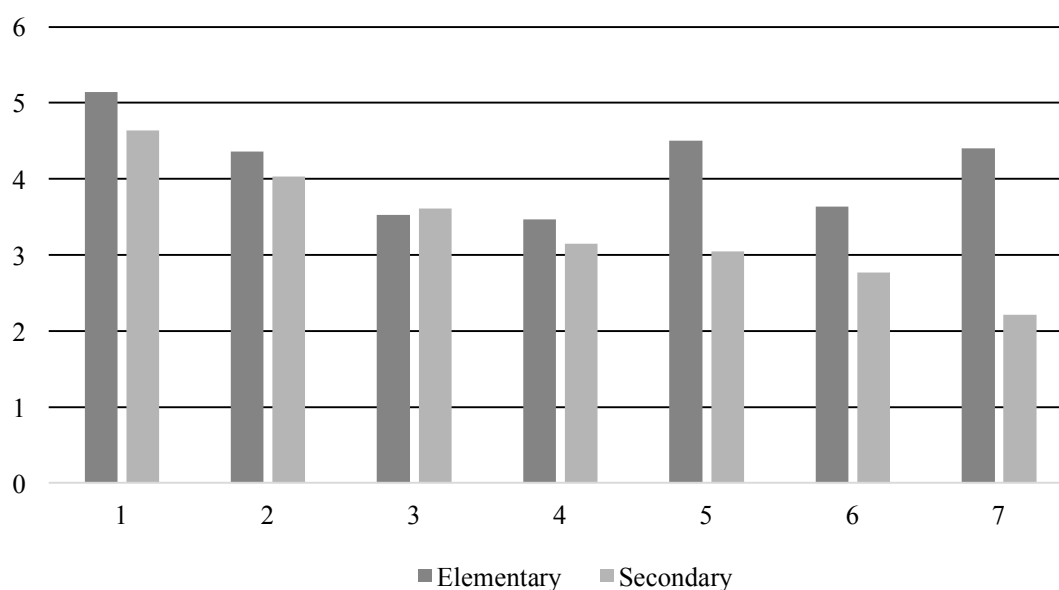
Cluster	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	1.50	4.00	5.00	4.86	5.50	7.00	1
2	2.44	3.55	4.03	4.19	4.78	6.06	2
3	2.11	3.11	3.44	3.57	4.00	6.00	1
4	1.92	2.81	3.31	3.29	3.58	5.15	3
5	1.17	2.67	3.50	3.69	4.83	5.83	1
6	1.00	2.00	3.00	3.17	4.13	8.00	2
7	0.00	1.58	3.33	3.13	4.75	6.33	2

The summary of mean responses for all participants indicate that coaches spent most of their time as relationship builder and helper – cluster 1 (4.86), the median is 5 for this cluster, which implies once or twice a week. Cluster 1 contains item 36, rated the highest (6.68) of all items in section B, the median for item 36 is 7, which implies once or twice per day. The rest of the clusters are listed in order of highest to lowest ratings: cluster 2 (4.19) – coaching, providing resources, working with teachers and PLCs, cluster 5 (3.69) – collecting analyzing and interpreting data, cluster 3 (3.57) – providing professional development, training, mentoring, cluster 4 (3.29) – duties, organizational, logistical, administrative, cluster 6 (3.17) – working with students, cluster 7 (3.13) paperwork related to state or district initiatives or grants.

**Data Question 4.** By examining the responses in the previous question, was there

a noticeable difference in how elementary (K-5) coaches responded compared to secondary (6-12) coaches?

Figure 2 is a graphic representation of the differences between elementary and secondary mean responses for each cluster of items. The vertical axis indicates the mean value of responses for all the items in the cluster and the horizontal axis indicates the number of the cluster. The solid line represents the mean values of elementary coaches and the dotted line represents the mean values of the secondary coaches.



1 = relationship builder/helper; 2 = Coaching, providing resources, working with teachers and PLCs; 3 = providing professional development, training, mentoring; 4 = Duties; organizational, logistical, administrative; 5 = Collecting analyzing and interpreting data; 6 = working with students; 7 = Paperwork related to state or district initiatives/grants

*Figure 2.* Elementary and Secondary Comparison of Section B Clusters

From the visual representation it is clear that the greatest difference between elementary and secondary mean responses occurred in cluster 7 (paperwork related to district and state initiatives and grants) followed by cluster 5 (collecting, analyzing, and interpreting data) and cluster 6 (working with students).

In table 15 the numeric values of the mean responses for each cluster is listed by level (elementary and secondary) in order to determine the significance of the differences in mean values.

Table 15

*The Mean Ratings for Each Cluster –Elementary vs. Secondary Results*

Level	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7
K-5	5.14	4.36	3.53	3.47	4.50	3.64	4.40
6-12	4.64	4.03	3.61	3.15	3.05	2.77	2.21

When comparing the mean values in cluster seven (paperwork related to state or district initiatives/grants), elementary coaches indicated that this activity occurred several times per month/once or twice per week (4 or 5 rating), compared to secondary coaches who only performed these tasks a few times per year (2 rating). Although there were differences in values between clusters five (collecting analyzing and interpreting data) and six (working with students) as well, they were not as great as cluster seven.

The data was then further disaggregated into two groups, one table indicating measure of central tendency for each cluster for elementary coaches (Table 16) and another table for secondary coaches (Table 17).

In table 16, the numeric values of the mean responses for each cluster is listed for elementary coaches in order to determine the significance of the differences in mean values. The table compares the clusters to one another instead of an elementary vs. secondary comparison.

Table 16

*Measures of Central Tendency for Section B Clusters – Elementary Coaches*

Cluster	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	4.00	5.00	5.00	5.14	5.50	6.00	
2	3.31	3.97	4.06	4.36	4.72	6.06	
3	2.67	3.11	3.33	3.53	4.06	4.89	
4	2.23	3.00	3.39	3.47	3.71	5.08	1
5	2.67	4.17	4.67	4.50	5.08	5.83	
6	1.50	2.75	4.00	3.64	4.75	5.00	
7	2.00	3.67	4.50	4.40	5.25	6.00	1

The mean ratings of each cluster indicate mean responses ranged from 3.47 (once or twice per month/several times per month) to 5.14 (once or twice per week). The range is smaller than that of secondary coaches as indicated by the mean values in Table 17. Cluster 1 (relationship builder/helper) was rated similarly by both elementary and secondary coaches and highest of all the clusters.

In table 17, the numeric values of the mean responses for each cluster is listed for secondary coaches in order to determine the significance of the differences in mean values. The table compares the clusters to one another instead of an elementary vs. secondary comparison.

Table 17

*Measures of Central Tendency for Section B Clusters – Secondary Coaches*

Cluster	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	1.50	4.00	4.75	4.64	5.38	7.00	1
2	2.44	3.13	3.63	4.03	4.94	6.06	2
3	2.11	3.06	3.50	3.61	3.89	6.00	1
4	1.92	2.69	3.00	3.15	3.54	5.15	2
5	1.17	2.38	2.75	3.05	3.50	5.33	1
6	1.00	1.50	2.50	2.77	3.50	8.00	2
7	0.00	1.00	1.83	2.21	3.00	6.33	1

The mean ratings of each cluster indicate mean responses ranged from 2.21 (a few times per year) to 4.64 (several times per month/once or twice per week). This range was greater than the range of mean values for elementary coaches.

Table 18 shows the results of a T-test to identify differences in the responses of elementary (K-5) coaches and secondary (6-12) coaches for each of the clusters (1-7) in section B of the survey. The T-test was conducted in order to determine whether the differences between the mean responses for elementary and secondary were statistically significant; p-values less than 0.05 are considered significant.

Table 18

*T-test Comparison of Elementary and Secondary Coaches' Responses*

Cluster	t	df	p-value	95% confidence intervals	
1	1.0767	18.6890	0.2953	-0.9338	2.9078
2	0.8305	20.3840	0.4159	-7.9660	18.5254
3	-0.2494	22.3280	0.8053	-7.1920	5.6465
4	0.9055	20.3110	0.3758	-5.3355	13.5355
5	3.3452	22.9740	0.0028	3.3250	14.1035
6	1.3346	20.7970	0.1964	-0.9697	4.4382
7	3.4100	21.6590	0.0026	2.5656	10.5487

The first four clusters were rated alike by elementary and secondary coaches, but the last 3 clusters showed differences in ratings. Although there were differences in clusters 5 through 7; only cluster 5 (collecting analyzing and interpreting data) and cluster 7 (paperwork related to state and district initiatives) were considered to be statistically significant – p-value less than 0.05. The greatest difference was in cluster 7 (paperwork related to state and district initiatives). Elementary coaches' mean responses were 4.40 compared to secondary with 2.21, indicating that elementary coaches spent significantly more time on paperwork related to state or district initiatives/grants than secondary. The next greatest difference was in cluster 5, where the mean responses for elementary coaches was 4.50 compared to 3.05 for secondary. Elementary coaches indicated that they spent significantly more time collecting, analyzing and interpreting

data than secondary coaches indicated. Lastly, there was a difference in cluster 6, although not statistically significant (p-value of 1.964), mean responses for elementary were 3.64 compared to secondary with 2.77, indicating that elementary coaches spent more time working with students than secondary coaches did. The greatest values for t (test) and df (degree of freedom) were in cluster 7 ( $t = 3.41$ ,  $df = 21.659$ ) and lowest p-value (significance) was in cluster 7 (p-value = 0.0026).

**Data Question 5.** Was there any relationship between high ratings (6, 7 or 8 on the scale) or low ratings (3, 4 or 5 on the scale) for a particular cluster in section B and a particular cluster in section C? Did coaches who prioritize their time in a similar way value similar skills/attributes? Are there any similarities within each section for B and C?

Table 19 is a correlation matrix between the clusters of sections B and clusters of C of the survey. They indicate similarities (higher correlations) and differences (lower correlations) between the ratings that were given by coaches for the items clustered together for the two sections of the survey. They also indicate internal correlations within cluster B and cluster C. The highest correlation scores are those closest to 1.



Table 19

*Correlation Matrix Between Clusters of Section B and C of the Survey*

Clusters	B1	B2	B3	B4	B5	B6	B7	C1	C2	C3
B 1	1.000									
B 2	0.745	1.000								
B 3	0.618	0.694	1.000							
B 4	0.678	0.652	0.693	1.000						
B 5	0.581	0.471	0.364	0.433	1.000					
B 6	0.568	0.706	0.471	0.597	0.436	1.000				
B 7	0.476	0.535	0.335	0.564	0.656	0.784	1.000			
C 1	0.340	0.150	0.115	0.234	0.340	0.570	0.567	1.000		
C 2	0.323	0.081	0.039	0.236	0.488	0.486	0.471	0.873	1.000	
C 3	0.219	-0.07	-0.14	0.170	0.345	0.301	0.334	0.713	0.860	1.000

The greatest correlations (top 5) between section C and section B are: C-1 and B-6 (0.570), C-1 and B-7 (0.567), C-2 and B-5 (0.488), C-2 and B-6 (0.486) and C-2 and B-7 (0.471). This implies that coaches who rated C-1 (knowledge and intellect) similarly, also rated B-6 (working with students) and B-7 (paperwork related to state or district initiatives/grants) similarly. Coaches who rated C-2 (leadership, professional and coaching skills) highly, also rated B-5 (collecting, analyzing, and interpreting data), B-6 (working with students) and B-7 (paperwork related to state or district initiatives/grants) similarly. Some of these correlations could be attributed to the differences between

elementary and secondary mean values as correlations could be similar high ratings or similar low ratings. For example, elementary coaches rated collecting, analyzing, and interpreting data (B-5) highly as well as paperwork related to state and district initiatives/grants (B-7). The same coaches (elementary) would have rated tasks associated with leadership, professional and coaching skills in a similar way, implying that the amount of their time they spent on those tasks were similar.

**Data Question 6.** What were the measures of central tendency for each individual item in section C (items 1-27)? Which skills, talents and knowledge did coaches rate to the most and the least important in their role as instructional coach?

In order to analyze the results from section C (skills, knowledge, and attributes) of the survey, the 27 items in section C were grouped together in three clusters in order to relate them to similar themes in the results of the interviews and focus group discussions. In table 20 the three clusters are identified and the items part of each cluster are listed.

Table 20

*Clustering of Items in Section B of the Survey*

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Cluster	Theme	Items
1	Knowledge and intellect	1, 2, 3, 8, 9, 16, 18, 19
2	Leadership, professional and coaching skills	5, 10, 12, 14, 15, 21, 22, 23, 26, 27
3	Talents, personality traits and attitude	4, 6, 7, 11, 13, 17, 20, 24, 25

---

Although some clusters had more items than others, the mean values, not the frequencies of responses, were compared when the data was analyzed, as higher ratings

indicated more time spent on those activities.

The results of section C of the survey relate to the second research question: What are coaches' perceptions of essential skills needed to fulfill their roles successfully?

A five-point rating scale was used for this section with 5 being extremely important, 4 very important, 3 important, 2 somewhat important and 1 not important. It is evident from the graph that item 17 (skilled at relationship building) was rated the most important and item 10 (knowledge of school law was rated the lowest). The measures of central tendency are listed for each item in section C of the survey in Appendix H: minimum, first quartile, median, mean, third quarter, and maximum. When analyzing the data in Appendix H, the items with the highest mean responses were identified in order to determine the skills, knowledge or attributes perceived by coaches to be the most important in the role as coach. Table 21 is a summary of the items with the highest ratings and their mean values of responses listed in order.

Table 21

*Items in Section C with the Highest Mean Responses Listed in Order*

Item	Mean values	
17	Skilled at relationship building	5.04
12	Excellent communication skills both verbal and written	4.85
1	Ability to problem solve	4.81
13	Excellent listening skills	4.81
24	Lifelong learner	4.81
23	Leadership talent, ability to motivate and inspire others	4.77
26	Ability to prioritize task	4.72
20	Optimistic, energetic and enthusiastic	4.65
25	Humility and openness to criticism	4.65
3	Change management skills and knowledge	4.62
27	A team player, skilled at facilitating participation by all	4.62
8	Ability to collect, analyze and interpret data	4.58
11	Highly organized (planning, record keeping and prioritizing)	4.54
22	Skilled as a classroom teacher, evident from data	4.50

All of these items have a mean response of 4.5 or greater, which is described as very important/extremely important. As noted in the analysis of data question 2, the activity that takes up most of the time of coaches in section B is relationship builder/helper, which aligns with the skill rated the highest in section C (skilled at relationship building).

Although most of the skills, talents, and attributes were identified by participants

as important or necessary in their role, eight items were rated close to 4 or lower. When looking at the graph in figure 5, all items had mean responses higher than 4.2 except for eight items. These items are summarized in table 22. They are listed with their mean response value in order from lowest to highest.

Table 22

*Items in Section C with the Lowest Mean Responses Listed in Order*

Item	Mean values	
10	Knowledge of school law	3.12
16	Subject knowledge across all subject areas	3.69
18	Well-read and keeping up with new educational trends	3.92
5	Thorough knowledge of adult learning theory	3.96
21	Thorough knowledge of organizational improvement	4.04
4	Clear personal vision and mission	4.04
6	Engaging and skilled public speaker	4.04
9	Technology knowledge and skills	4.08

It is interesting to note when comparing table 20 and table 21 that being a lifelong learner (item 24) was the fifth highest rated item, while being well read and keeping up with new educational trends was the third lowest rated item. Similarly, excellent communication skills (item 24) was rated second highest, however being an engaging public speaker was seventh lowest of all items.

**Data Question 7.** Looking at the ratings of items by cluster (1-3) overall, did one cluster of items rate higher or lower overall as compared to the other two clusters? Was there a particular cluster that rated higher?

Table 23 lists the values of the measures of central tendency for each of the three clusters for section C of the survey. The numeric values of the mean responses for each cluster is listed in order to determine the significance of the differences in mean values. The table compares the mean responses of all items in the cluster to one another.

Table 23

*Measures of Central Tendency for Section C Clusters – All Responses*

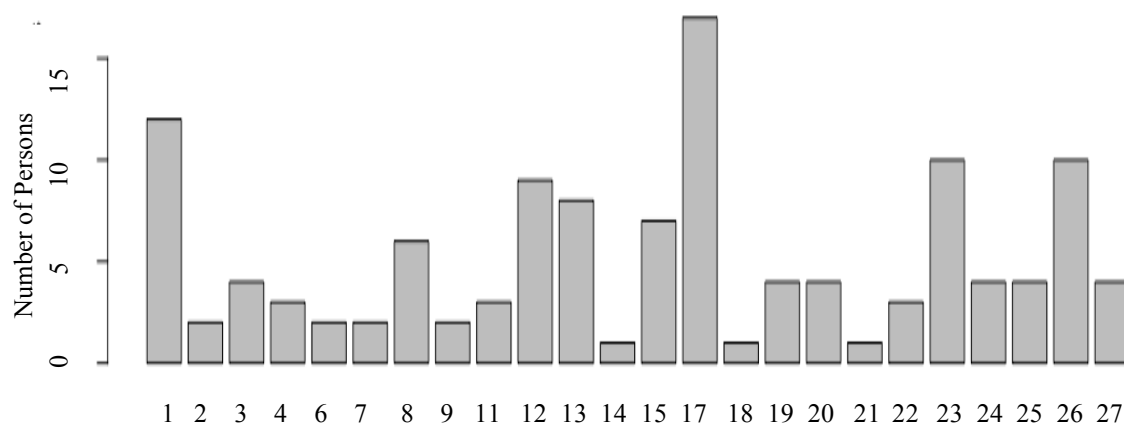
Cluster	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	3.38	3.88	4.25	4.31	4.50	6.88	
2	2.90	4.00	4.20	4.32	4.70	6.80	1
3	3.11	4.25	4.56	4.54	4.78	7.22	

Coaches rated clusters one (knowledge and intellect) and two (leadership, professional, and coaching skills) similarly, their mean responses of 4.31 and 4.32 are very close, whereas cluster 3 (talents, personality traits, and attitude) was rated higher overall.

**Data Question 8.** For the last item (30) participants were asked to prioritize the top six skills, knowledge, and attributes in order to determine what the priorities of most coaches were. Which items had the highest and lowest overall ratings? Were these priorities different overall for elementary and secondary or not? Were there coaches who gave very similar ratings? If so, how many?

Figure 3 is a graphic representation comparing the items identified by participants as priority items in section C (Skills, Knowledge and attributes) of the survey. The vertical axis represents the number of participants who selected a particular item as a priority (in their top six most important) and the horizontal axis list the numbers of all the

items in section C of the survey (1 through 27).



*Figure 3. Prioritizing of Items in Section C of the Survey*

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The frequencies of items prioritized as important in section C of the survey are listed in Appendix I. The frequencies of participants who selected items in their top six are listed in three columns, one for all participants, one for elementary coaches and one for secondary coaches. The four highest frequencies of items are summarized in table 24, comparing the top four priorities for all participants, elementary coaches and secondary coaches.

Table 24

*Section C, Item 30 – Prioritizing Most important Skills, Talents, and Attributes*

Item		Frequency
All participants:		
17	Skilled at relationship building	17
1	Ability to problem solve	12
23	Leadership talent, ability to motivate and inspire others	10
26	Ability to prioritize tasks	10
Elementary:		
1	Ability to problem solve	6
12	Excellent communication skills both written and verbal	6
17	Skilled at relationship building	6
26	Ability to prioritize tasks	5
Secondary:		
17	Skilled at relationship building	11
23	Leadership talent and ability to motivate and inspire others	7
1	Ability to problem solve	6
26	Ability to prioritize tasks	5

There were differences between the priorities of elementary and secondary coaches. While they had items 1, 17 and 26 in common, the frequencies were not the same. The greatest difference in frequency was for item 17 (skilled at relationship building); 11 secondary coaches selected that as a priority compared to only six elementary coaches. Elementary coaches selected item 12 (excellent communication skills both written and verbal) as a priority whereas secondary selected item 23 (leadership talent and ability to motivate and inspire others) as a priority.



**Data Question 9.** What were the measures of central tendency for each of the items in section D (1-23)? Which learning experiences were highly rated (3, 4 or 5) and which had low ratings (1 or 2)?

The items in section D (Professional learning experiences) were not clustered, as they are uniquely different activities. While some learning experiences could be grouped, not all experiences could, therefore grouping all items into clusters was not possible. The measures of central tendency for each item in section D of the survey are listed in Appendix J. For each item the following values are listed: minimum, first quartile, median, mean, third quartile, mean, maximum. A six-point rating scale was used for section D. The ratings were as follows: 1 – not beneficial, 2 – somewhat beneficial, 3 – beneficial, 4 – very beneficial, 5 – extremely beneficial, and 6 – not applicable (NA).

The data in Appendix J were analyzed and the items with the highest ratings (4.00 or higher) are listed in table 25. These were learning experiences coaches rated as very beneficial/extremely beneficial.

Table 25

*Items in Section D Listed in Order – Highest Mean Responses*

Item	Mean values	
9	Content specific courses like math foundations and reading foundations	4.62
3	On the job embedded learning experiences (learning by doing)	4.50
4	The influence of prior experiences in teaching	4.39
15	Individual, differentiated support from the district office	4.23
10	Instructional strategies workshops ex. SIOP and RtI	4.19
1	Collaboration and sharing among coaches at weekly meetings	4.15
2	District training for coaches: Teacher leader academy	4.15
16	Regular communication, updates and shared folders	4.08
21	Interactions with a coach while still in the classroom	4.00

The item with the second highest rating (on-the-job embedded learning/learning by doing) was frequently mentioned during interview and focus group discussion as well. Most of the items in section D were rated as beneficial to some degree. There were no items with a mean lower than 3.00. There were only seven items with a mean response lower than 4, those items are summarized in table 26.

Table 26

*Items in Section D Listed in Order – Lowest Mean Responses*

Item	Mean values	
13	Mid-year review	3.00
6	Book studies	3.19
12	Leadership academy week	3.58
20	Formal education; undergraduate and graduate studies	3.37
19	Mentoring from district personnel	3.76
14	Curriculum review week	3.77
18	Mentoring from building leader	3.80
17	Own research, reading and problem solving	3.92

Formal education was rated the fourth lowest as beneficial to coaches in their role. It is interesting to note that book studies had the second lowest rating, although coaches indicated during interviews and focus group discussion that they would like to do book studies. However, they expressed the need for the book studies to be more in-depth and followed by discussions and implementation of new learning.

**Data Question 10.** When looking at the clusters 1-7 in section B (describe your current role), is there a relationship/correlation between how coaches who rated a particular cluster in section B highly also rated similar learning experiences in section D (professional learning experiences) highly (3, 4 or 5 on the scale)?

A correlation matrix comparing the clusters in section B (describe your role) to the items in section D (professional leaning experiences) of the survey is included as Appendix K. The results of the correlation matrix indicate that there are correlations (a

value of 0.5 or higher) between some of the clusters in section B and certain items in section D. Correlations are similar ratings given by groups of participants. This implies that since cluster B2 (coaching providing resources, working with teachers and PLCs) which received a high rating, correlates with item 20 in section D (formal education, undergraduate and graduate studies), which received a low rating, there were coaches who had similar viewpoints on both of these concepts (cluster B2 and item 20 – a correlation value of 0.506). Results indicate that coaches who spent a large portion of their time on coaching, providing resources, and working with teachers in PLCs did not value their formal education as an effective means to prepare them for the task.

Cluster B5 (collecting analyzing and interpreting data) has a correlation value of 0.58 with item 12 in section D (leadership academy week). Since B5 had a high rating and item 12 a low rating, it can be inferred that the data review at the beginning of the school year, which mainly looks at the district perspective and overall school perspective, including operational data, was not considered as beneficial by coaches who spent a high percentage of their time collecting, analyzing and interpreting academic student data.

Cluster B7 (paperwork related to state or district initiatives/grants) was rated higher by elementary coaches than secondary and it correlates with item 1 in section D (collaboration and sharing between coaches at weekly PLC meetings), implying that elementary coaches rated item 1 higher than secondary coaches, with a correlation value of 0.563.

**Data Question 11.** When looking at the clusters 1-3 in section C, were there any relationships/correlation between how coaches rated a particular cluster in section C and how they rated learning experiences in section D?

The correlation matrix (Appendix L) compares the mean responses of the clusters

in section C (skills, knowledge, and attributes) to the mean responses of each of the items in section D (professional learning experiences). Due to the fact that the three clusters in section C are broad and contain skills, attributes, and knowledge that apply in many situations, there are higher correlation values than the clusters of section B which contains a set of very specific tasks and activities. A correlation value of 0.65 or higher was used to identify correlations between the three clusters in section C and the items in section D. In the correlation matrix (Appendix L), 11 high correlation values were identified. The correlations described as follows.

Cluster C1 (knowledge and intellect) correlates with item 6 (0.775) – book studies, item 13 (0.779) – mid-year review and item 20 (0.674) – formal education. Since all three of the items had low mean responses, it can be inferred that coaches who rated cluster C 1 similarly consider those three learning experiences to be less beneficial.

Cluster C2 (leadership, professional and coaching skills) correlates with item 4 (0.736) – influence of prior experience in teaching, item 6 (0.742) – book studies, item 12 (0.655) – leadership academy week, and item 13 (0.811) – mid-year review. Items 6, 12, and 13 had low mean values and items 4 had a high mean value, which implies that coaches who rated C 2 similarly did not find book studies, leadership academy week or midyear review beneficial, but did find prior teaching a beneficial learning experience.

Cluster C3 (talents, personality traits and attitudes) correlates with item 3 (0.722) – on-the-job embedded experience/learning by doing, item 4 (0.722) – the influence of prior experience in teaching, item 6 (0.686) – book studies and item 13 (0.7754) – mid-year review. This analysis implies coaches who rated talents, personality traits, and attitudes (C3) as important also rated on the job learning (3) and prior teaching (4) to be important learning experiences, while rating book studies (6) and mid-year review (13) to

be less beneficial to them.

### **Overview of Qualitative Results**

**Interviews results.** The responses were obtained in ten interviews with five elementary and five secondary coaches. All interviews were recorded and transcribed. For each question, the responses were labeled with an “in vivo” term for key phrases (Creswell, 2009). A complete list (Appendix M) of all in vivo terms and the frequencies of each term was created for elementary secondary and all responses. The in vivo terms for each question were then grouped by emerging, common themes. For each interview question, the responses, grouped by emerging theme, with the frequencies and the percentage of that frequency as compared to all recorded responses for that interview question, were summarized in tables.

Each table indicates how often similar phrases (in vivo terms) were mentioned across all interviews, expressed as a percentage of all total varied responses recorded for each level, as well as the total as follows: K-5, 6-12 and all responses. The purpose of the interviews was to obtain more information about the third and fourth research questions. It was possible that coaches had learning experiences other than those listed on the survey. In trying to determine what potential gap areas would be for coaches, it was not possible to know and list those in a survey, so that information could only be obtained through an interview.

**Question 1.** Talk about how you became an instructional coach. Was it a personal ambition or were you approached or inspired by someone else?

In table 27, the three emerging themes for the first question are identified. The responses vary from elementary to secondary, but two main reasons for participants moving into the role of coach emerged. The in vivo term (Appendix M) with the highest

frequency for this question was “noticed as a good teacher by performance data”, a total of 8 responses.

Table 27

*Emerging Themes for Question 1*

Emerging Themes – Question 1	K-5	%	6-12	%	All	%
A personal ambition, part of career goals or desire to make a greater impact for which preparation steps were taken, felt comfortable to become a coach	14	50.0	10	52.6	24	51.1
The coach was noticed by others as being a good teacher and encouraged to become a coach	10	52.6	7	36.8	17	36.1
Was unsure about becoming a coach and it was a difficult decision	4	14.2	2	10.5	6	12.8

A strong emerging theme for the first question theme was that becoming a coach is a personal ambition; to achieve a new career challenge and thereby having a greater impact than remaining a classroom teacher. Another strong theme, more so for elementary coaches than secondary, is that coaches were identified as highly effective teachers, based on their performance/student data and encouraged by others (principal colleagues or former coach) to take on the role.

**Question 2.** What are some personal strengths, attributes or even talents that you have that help you in your role as instructional coach?

In table 28 below, four emerging themes for question 2 are identified: professional leadership skills, personality traits, knowledge and experience, and developing your own role.

Table 28

*Emerging Themes for Question 2*

Emerging Themes – Question 2	K-5	%	6-12	%	All	%
<u>Professional leadership skills</u> : Organizing prioritizing, multitasking, problem solving, data analysis, good communication and listening	11	36.7	7	29.2	18	33.3
<u>Personality traits</u> : Open to learning, not afraid to make mistakes, approachable, relationship builder, helpful, caring, trustworthy, integrity collaborative, team player	13	43.3	9	37.5	22	40.7
<u>Knowledge and experience</u> : Curriculum and instruction knowledge and experience and credibility, wide experience, technology knowledge and skills	2	6.7	5	20.8	7	12.9
<u>Developing your role</u> : Understanding and balancing the dual role, adaptable and flexible in various settings, strong work ethic patience, perseverance	4	13.3	3	12.5	7	12.9

The personality of the coach and the ability to build trusting relationships with others is the strongest theme. The in vivo phrase “relationship building skills and approachable nature” has the highest frequency (8). Another key aspect of coaching is identified by coaches as professional leadership skills including being organized and the ability to problem solve, prioritize, and multi-task. Relationship building was also identified as the most important skill in the survey.

**Question 3.** Which learning experiences or learning opportunities have you had in your career in education or in your personal life that helped prepare you for this role?

The four emerging themes for interview question 4 are identified in table 29.



They are Life experiences and formal education, professional leadership and instructional content courses, learning from others and personal learning and on-the-job learning.

Table 29

*Emerging Themes for Question 3*

Emerging Themes – Question 3	K-5	%	6-12	%	All	%
<u>Life experiences and formal education:</u> Graduate and post graduate studies, ties to the community, church, being a parent, leadership roles while being a teacher	6	27.2	3	12.5	9	19.6
<u>Professional leadership and instructional content courses:</u> Trego Ed, crucial conversations, Foundations of math and reading, conferences	3	13.6	6	25.0	9	19.6
<u>Learning from others:</u> Other coaches, mentor, Principal, district staff, previous coach, great teachers, weekly PLC meetings	7	31.8	8	33.3	15	32.6
<u>Personal learning and on-the-job learning:</u> Learning by doing, personal research and reading, experiences in the classroom	6	27.3	7	29.2	13	28.3

The two in vivo phrases (Appendix M) with the highest frequencies were “day to day support from other coaches/learning from peers” (5) and “on the job learning in the coaching role” (6). These two terms are central to the two strongest themes; learning from others (32.6%) and personal and on-the-job learning (28.3%). The results for elementary and secondary were very similar for these two themes.

**Question 4.** Do you think that you have changed how you do things now as compared with when you first entered the position? Can you elaborate on this?

Four emerging themes were identified for interview question 4. They are listed in

table 30. The four themes are: Improved ability to plan, ability to work with adults had improved, focus had shifted to more coaching and deeper understanding of requirements

Table 30

*Emerging Themes for Question 4*

Emerging Themes – Question 4	K-5	%	6-12	%	All	%
<u>Improved ability to plan</u> ; predict, organize and anticipate what to expect	5	23.8	4	26.7	9	25.0
<u>Ability to work with adults had improved</u> ; more sensitive to what is reasonable to ask and how, more confident in providing professional development, empowering teachers and overcoming resistance	5	23.8	5	33.3	10	27.8
<u>Focus had shifted to more coaching</u> ; not just relationship building and being a helper, more time coaching, improved ability to give feedback	9	42.8	4	26.7	13	36.1
<u>Deeper understanding of requirements</u> ; state and district accountability and documentation requirements	2	9.5	2	13.3	4	11.1

Several coaches reported a great improvement in their coaching abilities (36.1%) as compared to when they first entered the role. When comparing the results of question 7, all the coaches (100%) indicated that the first year was a steep learning curve, and they felt that they knew very little about the role or the skills needed for coaching. Another strong theme (closely related to coaching) is learning how to work with adults (27%). Frequencies indicate that this idea was more of a challenge for secondary coaches (33.3%) than for elementary coaches (23.8%). Several coaches indicated that this was very difficult for them to adapt to at first (refer to question 7 results). The ability to plan

and anticipate what lies ahead (25%), comes with experience and on-the-job learning, as is evident from the results of question 3.

**Question 5.** Did you have a role model or mentor whose example you followed or who provided advice?

Emerging themes were not identified for question 5, as the responses from all participants were “yes.” The kinds of role models/mentors were very diverse, with the exception of ‘other coaches’ having the highest frequency (Appendix M). This result is consistent with the results from question 3 where coaches reported that the most impactful learning experience was learning from others (32.6% of all responses).

**Question 6.** Talk about the Coaches’ PLC group. Does the collaboration impact what you do? Describe how and why.

Three emerging themes were identified for interview question 6 they are listed in table 31. The four themes were collaboration, emotional support and gap areas/opportunities for improvement.

Table 31

*Emerging Themes for Question 6*

Emerging Themes – Question 6	K-5	%	6-12	%	All	%
<u>Collaboration</u> : Time to problems solve, share Ideas, resources, share the workload, the time is valued	23	82.1	13	61.9	36	73.4
<u>Emotional support</u> : encouragement, challenge and inspiration from peers	4	14.3	0	0	4	8.2
<u>Gap areas/opportunities for improvement</u> : More structure, learning is shallow, book Studies need to be more in-depth, clearer role descriptions, more intentional deep learning, opportunities for elementary and secondary to meet both together and separate.	1	3.5	8	38.1	9	18.4

The results from questions 5 and 3 are consistent with the responses for this question. Coaches value the time to meet with other coaches to problem solve, learn, share and collaborate. A strong theme is collaboration with other coaches (73.4%). This result is consistent with results from interview question 3 as well. There was a marked difference in the responses of elementary and secondary coaches to the second theme: Coaches' PLC provides emotional support encouragement. None of the secondary coaches mentioned emotional support from their peers. The third theme indicates that secondary coaches have a need for deeper learning and more in-depth book studies (38.1%) compared to elementary coaches (3.5%).

**Question 7.** When you first started the coach position, did you feel prepared for the role? Explain.

Three themes emerged for interview question, they are identified in table 32. The three themes were: beneficial learning experiences, unprepared to deal with adults and the first year as coach was difficult.

Table 32

*Emerging Themes for Question 7*

Emerging Themes – Question 7	K-5	%	6-12	%	All	%
<u>Beneficial learning experiences</u> : Previous leadership roles, class teaching, on-the-job learning, strong school leadership	7	33.3	5	25.0	12	29.3
<u>Unprepared to deal with adults</u> : Coaches new to role do not know how to handle conflict, the district training did not prepare coaches to deal with adults	4	19.0	5	25.0	9	21.9
<u>The first year as coach was difficult</u> : “Steep” Learning curve in the first year, feeling unsure/incompetent, making many mistakes, trying to figure out their role, need for mentoring in the first year	10	47.6	10	50.0	20	48.8

There were no coaches who felt prepared for the role of coaching. All of the coaches reported that the first year as a coach was a steep learning curve. Several coaches reported that they did not have a clear understanding of what the role of coach meant and that they had to create their own role within their school over time. As with the responses to question 3, the overwhelming response was that learning to become a coach happened on-the-job (28.3%). Several coaches indicated that the learning in the first year was related to working with adults, handling conflict and how to approach a coaching situation.

**Question 8.** Are there areas of your position in which you wish you had more knowledge, insight or training?

Three themes emerged for interview question 8. They are identified in table 33. The three themes were how to deal with adults, content knowledge, and coaching skills.

Table 33

*Emerging Themes for Question 8*

Emerging Themes – Question 8	K-5	%	6-12	%	All	%
<u>How to deal with adults</u> : Handling conflict, having difficult conversations, providing effective PD, adult learning theory, how to get ‘buy in’ and overcome resistance	2	20.0	13	61.9	15	48.4
<u>Content knowledge</u> : Deeper curriculum knowledge across all subjects/grades, how schedule and provide appropriate interventions, deeper understanding of legal/state requirements, EC processes	8	80.0	2	9.5	10	32.3
<u>Coaching skills</u> : How to become a “better” coach, deeper book studies with reflection, discussion, best practices and a ‘tool kit’ for coaches, how to differentiate coaching and PD for teachers, how to overcome the “evaluator” image	0	0.0	6	28.6	6	19.4

There were marked differences between the way elementary and secondary coaches responded to question 8. Secondary coaches overwhelmingly indicated a need to learn how to work with adults, how to overcome resistance to coaching, how to get “buy-in”, how to handle conflict and have difficult conversations (61.9%). Secondary coaches indicated a desire to become better at “coaching itself” to deepen their knowledge of adult learning theory and how to plan and present quality professional development

(28.6%). Elementary coaches did not indicate a need for the third theme, but expressed a need for deeper content knowledge (80%), which was not a strong theme for secondary coaches (9.5%).

**Question 9.** Are there any barriers to success or frustrations that you experience?

If so can you talk about those?

Five themes emerged for interview question 9. They are identified in table 34.

The five themes were: not enough time to coach, unclear role and leadership support, the impact of district and state initiatives, teachers are resistant to coaching, and gaps in coach training.

Table 34

*Emerging Themes for Question 9*

Emerging themes – Question 9	K-5	%	6-12	%	All	%
<u>Not enough time to coach:</u> Fragmented day, many other duties, not enough time in classrooms and in PLCs	7	43.7	6	31.6	13	37.1
<u>Unclear role and leadership support:</u> Teachers Do not understand the role and how to use the Coach, coach is seen as evaluator, leadership does not follow up after coaching, poor communication with district staff	4	25.0	3	15.8	7	20.0
<u>The impact of district and state initiatives:</u> Too much time required for implementation accountability and paperwork	2	12.5	4	21.1	6	17.1
<u>Teachers are resistant to coaching:</u> Teachers avoid interacting with coach, do not read communications, teachers are overwhelmed and do not have time for coaching	1	6.3	6	31.6	7	20.0
<u>Gaps in coach training:</u> The timing and Depth of training does not align with coaches' Needs, constant changes, new programs and new initiatives do not allow for mastery, reducing confidence	2	12.5	0	0.0	2	5.7

In question 9 secondary coaches identified two strong themes that represent obstacles: not enough time to coach (31.7%) and teacher resistance to coaching (31.6%). Elementary coaches responded more frequently than secondary about the lack of time and a fragmented day with many varied responsibilities (43.7%). The second strong theme for elementary coaches was the lack of a clear role definition and expectations (25%). Secondary coaches also indicated that paperwork associated with district or state



initiatives took up a large portion of their time (21.1%).

**Question 10.** If there were one thing that you could change in your daily round, that would make you more effective, what would that be, why?

Two themes emerged for interview question 10. They are identified in table 35. The two themes were more time to coach and really “reaching” the teachers.

Table 35

*Emerging Themes for Question 10*

Emerging Themes – Question 10	K-5	%	6-12	%	All	%
<u>More time to coach:</u> Reducing other duties (operational, administrative) and common planning time for PLCs	6	54.5	9	81.8	15	68.1
<u>Really “reaching” the teachers:</u> Getting “buy in”, overcoming resistance, helping teachers not to feel overwhelmed, not being seen as an evaluator	5	45.5	2	18.2	7	31.8

As with the previous question, the lack of time to coach was a strong theme for elementary and secondary coaches. What is interesting to note is that elementary coaches indicated that teacher resistance to coaching was a barrier (45.5%). This had a very low frequency for elementary coaches in question 9, but the theme did emerge here, in question 10, more strongly. The same two themes that emerged for secondary coaches emerged here again in question 10 – lack of time (81.8%) and teachers’ resistance to coaching (18.2%).

**Question 11.** What types of professional learning experience would help you to become more effective?

There were four emerging themes for interview question 11. They are identified in table 36. The four themes were: improving coaching skills, working with adults, learning by observing, and content knowledge.

Table 36

*Emerging Themes for Question 11*

Emerging Themes – Question 11	K-5	%	6-12	%	All	%
<u>Improving coaching skills</u> : Practical real life observation of lesson or videos, how to analyze a lesson, give feedback and get feedback on coaching, direct intentional mentoring for new coaches, in-depth book studies with discussion, reflection and implementation	4	40.0	4	33.3	8	36.4
<u>Working with adults</u> : Overcoming resistance to coaching, how to build trust and motivate people, how to handle conflict and crucial conversations	2	20.0	3	25.0	5	22.7
<u>Learning by observing</u> : Visits to other coaches in the district or other districts, shadowing them learning from them	1	10.0	2	16.7	3	13.6
<u>Content knowledge</u> : Meaningful integration of technology, engaging students with low attention spans, overcoming the impact of environment on students, math and reading foundations, training on state accountability requirements and documentation	3	30.0	3	25.0	6	27.2

The frequencies of responses for the “in vivo” phrases for this question were very low, as almost each coach responded in a unique way about their learning needs (Appendix M). When clustered together, similar responses became more evident. The desire to improve as a coach was the most dominant theme for both elementary (40%)

and secondary (33.3%) coaches. Several coaches expressed the need for direct instruction and practical strategies to implement as well as feedback on their own coaching, and seeing coaching in action. One coach suggested that coaches watch recordings of lessons to analyze and develop suggested feedback they would give to the teacher, and then they, in turn, would be given feedback on how accurate they were. During discussion with elementary and secondary coaches the need for practical, direct instruction on how to coach was indicated. Two coaches mentioned the term “tool kit,” meaning a set of skills to have ready in various situations when dealing with teachers.

**Question 12.** Is there anything else you would like to add?

Four themes emerged for interview question 12. They are identified in table 37. The four themes were: improving coaching skills, district support, professional learning needs, and day-to-day challenges. The final question was open ended and intended to give participants an opportunity to mention anything that was not addressed through the interview questions, but which they felt was pertinent to the topic.

Table 37

*Emerging Themes for Question 12*

Emerging Themes – Question 12	K-5	%	6-12	%	All	%
<u>Improving coaching skills</u> : Observing other coaches, different coaching models and forming small coaching groups for similar schools	0	0.0	3	37.5	3	17.6
<u>District support</u> : Coaches need a voice in the content covered weekly, clear expectations, oversight of the role with feedback, reducing redundant, complicated paperwork and providing emotional support and encouragement in PLCs	3	33.3	3	37.5	6	35.2
<u>Professional learning needs</u> : Training on how to deal with difficult people, handling conflict, mentoring for new coaches, training on new trends in education/innovation	1	11.1	2	25.0	3	17.6
<u>Day to day challenges</u> : balancing the role of coach and member of the leadership team, handling isolation, defining the unique role and disagreements with administrator's over instructional practices/quality instruction	5	55.5	0	0.0	5	29.4

Elementary coaches' responses centered on a need for support, feeling isolated, and balancing the unique role, (as they are neither a teacher nor an administrator) and having to do observations that are non-evaluative. Secondary coaches' responses related more toward improving coaching skills and more effective ways to deal with adults. Secondary coaches expressed the need to observe other coaches and learn from them. The need to observe and learn from other coaches emerged several times during interviews in several questions; this question as well as 3, 5, 6, and 11.

**Focus group results.** Two focus group discussions were conducted, one with

elementary coaches and one with secondary coaches. Each group had four participants. The discussions were recorded, transcribed, and in vivo terms assigned to key phrases (Cresswell, 2009). All responses and the frequencies for each response were recorded (Appendix N) by focus group prompt. For each prompt the responses have been grouped by emerging themes. The frequencies were recorded by how many times the terms were mentioned during the group discussions and arranged in the last three columns of each table (Appendix N) as follows: K-5 frequencies, 6-12 frequencies and all participants' frequencies.

Table 38 is a summary of all emerging themes from all five prompts that were identified for the two focus group discussions, with total frequencies for each emerging theme. The frequencies were recorded by how many times the terms were mentioned during the group discussions and arranged in the last three columns of each table as follows: K-5, 6-12, and all participants' response frequencies.

Table 38

*Summary of Emerging Themes for Focus Group Discussions*

Prompt	Emerging Theme	K-5	6-12	All
Is a clear, consistent outline and role description beneficial or even needed?	1. A detailed role description is not possible, but a general outline is description is beneficial.	5	7	12
	2. The role varies greatly across the district due to various factors.	2	11	13
	3. Coaches create their own role as they learn on the job and from other coaches.	4	7	11
	4. The role has evolved and changed significantly over time due to the implementation of district and state initiatives which does not allow for a clear, consistent role description.	4	12	16
Prioritizing with a very full plate and diverse list of tasks can be challenging, what strategies or supports can make this easier?	1. Support and guidance from the district is essential to ensure that all coaches see the “big picture” and align with the district’s focus.	10	4	14
	2. Strong, supportive leadership is needed at school level to help coaches to prioritize based on the needs of the school as well as staying aligned with the district’s focus.	5	9	14
What are some personal traits/attributes or even talents that are essential to being an effective instructional coach?	1. Knowledge of adult learning theory and the ability to work with and lead adults	9	16	25
	2. Sound knowledge of curriculum and instruction	4	2	6
	3. Keen observational and communication skills	5	5	10
	4. Flexible and open to new learning	5	5	10
	5. Professional leadership skills	6	5	11
	6. Patience, tenacity and a positive, growth mindset	3	6	9
	7. Confidence and a level headed, realistic perspective of situations	3	3	6

(Continued)

Prompt	Emerging Theme	K-5	6-12	All
	8. Highly visible, friendly and reaching out to others and being available to teachers	5	5	10
What advice should be given to someone brand new to the role?	1. The focus of the first year as coach is to build relationships and trust and to get to know the teachers while figuring out their role.	2	6	8
	2. Working with adults is challenging, it takes time to learn how to deal with conflict and not to take things personally.	6	8	14
	3. The dual role of coach is unique; neither teacher nor administrator. It takes time to adjust to it, reach out to other coaches.	5	9	14
	4. There is no detailed guide or manual. Be open and receptive to new learning; observe, shadow experienced coaches, reflect, keep a journal, make notes, ask for advice.	8	11	19
What professional learning experience or training is vital to this role? If everyone present were a task force assigned to designing modules for coaches, what would be your “must haves”, what would be at the top of the list and why?	1. Learning how to professionally develop and coach adults and deal with conflict	2	4	6
	2. Deepening knowledge and understanding of quality coaching. practical, situational learning on how to become a better coach	4	3	7
	3. Deepening knowledge of up to date curriculum, instruction and state and district requirements	2	1	3
	4. Personal growth and mastering the skill of coaching	1	3	4

The four themes that emerged in the first prompt relate closely to the results from the interviews and surveys. Although a clear role description was not possible as the role differs across the district, coaches indicated that a general outline and clear guidelines are needed. In question 9 of the interviews, elementary coaches identified an unclear role as

a barrier. When given the opportunity to add anything else in question 12 of the interview, two elementary coaches added that due to the unique role some coaches feel isolated and find it difficult to be approachable to teachers when they are seen as being in a supervisory role. On-the-job learning, and coaches developing their own roles were themes that emerged during the interviews as well in question 3, 7, and 12 of the interviews.

Two themes that emerged in the second prompt were the importance of strong leadership and support from the district, and support from building leaders. Coaches responded that the support from the coach PLC group was essential in helping to keep the “big picture” and prioritize a full plate to align with the district focus. Principals allowing coaches to make decisions and customize district priorities for their school was appreciated by coaches.

In the third prompt, the skill most frequently mentioned was the ability to work with adults and understand how adults learn. Other skills and abilities mentioned were sound curriculum knowledge, keen observational skills, flexibility and adaptability, patience, tenacity, level headedness, professional leadership, a growth mindset, confidence, and being visible and available.

When asked what advice coaches would give to someone new to the role (fourth prompt) most responses centered around allowing themselves time to adjust to the unique role of being neither teacher nor administrator, as well as time to adjust to working with adults. Most coaches reported the first year was spent building relationships and trust by getting to know the teachers. The need to learn how to work with adults was a very strong theme for secondary coaches in the interviews as well (question 8).

When asked about which professional learning experiences would benefit coaches



in the last prompt, most responses related to two themes; a desire to deepen knowledge of quality coaching, practical situational learning with feedback, and the second theme: learning how to work more effectively with adults, how to plan professional development, deal with conflict and overcome resistance to coaching.

### **Summary**

Three instruments were used to collect data for this research study. A survey was provided to all coaches in the district, and completed by 26 out of 30 coaches, a participation rate of 86.7%. The survey results were used for a quantitative analysis. The other two instruments, interview questions and focus group prompts, were used for qualitative research. A total of 10 coaches were interviewed, five elementary and five secondary coaches. Two focus group discussions were conducted. Each had four participants. One group was elementary coaches, and the other group was secondary coaches. The results of the survey instrument were analyzed using software R – version 3.3 to determine measures of central tendency. Where applicable, T-tests were run using a basic ANOVA, to determine whether any correlations between data sets were evident.

A set of data analysis questions were developed to serve as data analysis tools. The items in two of the sections, B and C, of the survey were also clustered together around the data analysis questions to allow for emergent themes to be analyzed and compared. Each section of the survey was analyzed, and comparisons drawn between the responses of elementary coaches compared to the responses of secondary coaches. The measures of central tendency for each item, as well as each cluster, where applicable, were compared and emerging themes described.

The analysis of the interview questions was done by listing the frequencies of all “in vivo” phrases and the frequencies of responses by elementary (K-5), secondary (6-12)

and all participants (Appendix M). The responses were then clustered by emerging themes for each question, and the frequencies for each cluster were broken down by level as described before. A description and comparison of emerging themes followed each interview question data summary.

The focus group analysis was done by listing all “in vivo” phrases by emerging theme (Appendix N). The first prompt had four themes, the second prompt had two themes, the third prompt had eight emerging themes, and the fourth and fifth prompts each had four emerging themes. The frequencies of responses (by themes) were then summarized in one table, grouped by focus group prompt. Finally, the emerging themes for each prompt was described and compared. In the next chapter, an interpretation of the findings will be discussed, as well as implications of those findings.

## **Chapter 5: Summary, Conclusions, and Recommendations**

This research study was conducted to examine the perceptions of instructional coaches regarding the effectiveness of varied professional learning experiences in addressing their own professional development needs. The study also examined how instructional coaches interpret their role and function in their building and district as well as the knowledge and skills they deem essential in performing their duties. A mixed methods approach was used for this study. This approach allowed for greater depth of insight into the research problem and questions than a quantitative or qualitative study (Caruth, 2013). The quantitative data were collected by providing a survey to all coaches in the selected district; 26 out of 30 coaches completed the survey. The qualitative data were collected during 10 interviews with five elementary and five secondary coaches as well as two focus group discussions, one with four elementary coaches and one with four secondary coaches. In this final chapter the findings are interpreted by relating them to the literature review, problem statement, theoretical framework, and research questions. Finally, conclusions and suggestions for practice are discussed, limitations described and recommendations for further research are provided.

### **Interpretation of the Findings**

Effective teachers are often selected to become instructional facilitators and placed in the role of coach or facilitator with the assumption that they have the skills and abilities necessary for the role (Gallucci et al., 2010). The assumption cannot be made that great teachers will necessarily make great instructional leaders (Neumerski, 2013; Poglinco & Bach, 2004). The results of the study were consistent with this statement from the literature review. The results of the survey, question A10, revealed that a large percentage of teachers in coaching roles were identified by their peers as effective

teachers. In fact, 62% were recognized as teacher of the year. Coaches reported during interviews (interview question 1) that the reason they became a coach is that they were recognized by peers, former coaches, or principals as being excellent teachers and were encouraged to take on the role of coach. In the survey, coaches reported that being an effective teacher was an essential skill for coaches (item C22). However, all the coaches (100%) reported that they did not feel prepared for the role of coach, that the first year was a steep learning curve (interview question 7) and that most of what they learned about the role of coach was on-the-job, by being in the role (section D of the survey and question 3 of the interviews).

The study was conducted through the lens of the four research questions:

1. What are instructional coaches' perceptions of their roles within educational settings?
2. What are instructional coaches' perceptions of essential skills needed to fulfill their roles successfully?
3. What types of professional learning experiences do instructional coaches perceive as valuable in meeting their professional development needs?
4. What do instructional coaches perceive as gaps in their own professional development?

**RQ 1.** The role and function of the instructional coach varies greatly from one district to another (Coggins et al., 2003; Neumerski, 2013). Without clearly defining the role of instructional coaches, it is challenging for schools to use these leaders effectively (Neumerski, 2013). There is no single definition of coaching; coaches even vary in the way they describe themselves (Neumerski, 2013). Aguilar (2013) found that a clearly defined role for the instructional coach or facilitator was uncommon. The results of

Section B (describe your current role) of the survey as well as focus group prompts 1, 3, 4, and 5 relate to the first research question. By looking at the time spent on various tasks (section B of the survey) coaches defined their roles in terms of priorities. Data analysis indicated that most of their time was spent with individual teachers to support/encourage/empathize and build trusting relationships, followed by: providing resources and materials to teachers; providing coaching feedback (verbal or written); observing lessons or conducting classroom walk-throughs; meeting with the principal regarding instruction and/or coaching; assisting teachers with technology for instruction (online resources, programs, applications, School Net, Home Base, Canvas etc.); supporting the development of effective PLCs, assisting teachers to plan lessons/modules/activities; facilitating PLC meetings; and collaborating and planning with the blended learning coaches or other specialists. These items represented the top ten mean responses.

Despite the fact that providing coaching feedback and observing lessons, key functions of coaching, featured in the top 10 activities, modeling lessons (46th out of 52) and co-teaching (45th out of 52) were rated in the bottom six out of 52 activities. According to Dorman (2009), a key function of coaching includes modeling lessons, co-teaching, and coach-teacher conferences. The fact that conducting classroom walk through observations has the fourth highest mean response of activities would imply that the feedback given to teachers is based on these observations, not on individualized focused coaching sessions paired with coach-teacher conference, modeling, or co-teaching (Dorman, 2009). The classroom walk-through process, while providing brief, anecdotal feedback, is not part of what can be considered coaching. “Walk-throughs are a way of getting in classrooms regularly for approximately ten minutes to observe instruction. The process is not evaluative but is a way to notice trends in the school”

(Hanson, 2011, p. 78).

The fact that the mean responses for modeling and co-teaching rated so low on the scale (2 – a few times a year) could be explained by the stress level associated with these activities. Denton and Hasbrouck (2009) identified three distinctive levels of intensity of activities in which coaches may engage. The first level was the least intensive and informal in nature, characterized by relationship-building activities. The second level was more intense and formal; examples of activities included co-planning and assistance with data analysis. The third level was the most formal: such as co-teaching, modeling lessons, observing lessons, and providing feedback. “The most formal and intense [level] includes activities that may be stressful for both the coach and the teacher” (Denton & Hasbrouck, 2009, p.156).

When looking at comparisons between the clusters of data for section B, the activity that took up the greatest amount of time for most coaches was “relationship builder and helper,” a level one activity. Most coaches rated this activity as occurring once or twice per day. The rest of the clusters are listed in order of highest to lowest ratings: cluster 2– coaching, providing resources, working with teachers and PLCs, cluster 5– collecting analyzing and interpreting data, cluster 3– providing professional development, training, mentoring, cluster 4– duties, organizational, logistical, administrative, cluster 6– working with students, cluster 7– paperwork related to state or district initiatives or grants. All of these activities fall in the first two levels, less formal and intense (Denton & Hasbrouck, 2009). The top 20 activities identified by coaches (items 36, 18, 4, 12, 41, 47, 2, 1, 9, 14, 46, 10, 7, 17, 27, 32, 33, 48, 5, 8) do not contain any level 3 activities.

The way that coaches prioritize their time, is not prescribed, but rather a reflection

of how they described their own role. When asked if a clear, consistent outline and role description would be beneficial or even needed, responses varied. However, several coaches mentioned during the focus groups as well as the interviews that coaches develop their own roles over time, which is consistent with what was found in the literature. There is no single definition of coaching; coaches even vary in the way they describe themselves (Neumerski, 2013). There were four emerging themes from the first focus group prompt: A detailed role description is not possible, but a general outline is beneficial, the role varies greatly across the district due to various factors, coaches create their own role as they learn on the job and from other coaches, role has evolved and changed significantly over time due to the implementation of district and state initiatives which does not allow for a clear, consistent role description.

Part of the problem with defining the role of coach is the wide variety of duties and activities associated with this role. Gallucci et al. (2010) describe the role of instructional facilitator as multifaceted, ambiguous and contextually dependent. Therefore, coaches often resort to allocating their time based on what they understand their focus to be (Deussen et al., 2007). Several coaches reported that the first year of being a coach was spent on figuring out their role and building relationship with teachers (focus group prompt – 8 responses). Coaches also responded feeling “pulled in a million directions” and “never finishing any task”.

Finally, a stressor for many coaches, reported more frequently by elementary coaches (interview questions 9 and 12), was balancing the unique role of coach and the role conflict created by doing observations. The inherent conflict between the roles of coach and evaluator can be difficult to balance, if these lines are blurred, it renders coaching efforts futile. Teachers may be leery of accepting involvement from a person

who conducts walk-through observations (Tschannen-Moran & Tschannen-Moran, 2011). This in between role, neither a teacher, nor an administrator and being the only person in the building in that role can lead to feelings of isolation and insecurity (fourth emerging theme – interview question 12). Several coaches reported feeling isolated and that they were often unsure whether they were doing “a good job” and doing things “the right way.”

**RQ 2.** Due to the multifaceted, ambiguous nature of coaching described above, the skills sets associated with the role, depends on the coach. In many cases, instructional coaches themselves defined the skill sets that were valued as essential for effective coaching (Neumerski, 2013). Section C of the survey as well as interview questions 2 and 7 and focus group prompts 3 – 5 sought to answer the second research question. As the highest mean response for section B was that of “relationship builder and helper”, it is not surprising that the skill with the highest mean responses was item 17 in section C (skilled at relationship building). The other highly rated skills included the following: excellent communication skills, both verbal and written; ability to problem solve; excellent listening skills; lifelong learner; leadership talent; ability to motivate and inspire others; ability to prioritize tasks; optimistic, energetic and enthusiastic; humility and openness to criticism; change management skills and knowledge; a team player; skilled at facilitating participation by all; ability to collect; analyze and interpret data; highly organized (planning, record keeping and prioritizing) and skilled as a classroom teacher evident from data. All of these items had a mean response of 4.5 or greater indicating very important/extremely important.

The last question of section C asked coaches to prioritize the skills they thought were most important. The combined results for all participants showed that the highest



priorities were identified (in order) excellent communication skills both verbal and written, skilled at relationship building, excellent listening skills, ability to collect, analyze and interpret data, ability to prioritize tasks. The top four priorities (in order) of the elementary coaches were ability to problem solve, excellent communication skills both written and verbal, skilled at relationship building and ability to prioritize tasks. The secondary coaches' priorities were slightly different. While some areas overlap, they were not prioritized the same. Secondary coaches' priorities were (in order) item skilled at relationship building, leadership talent and ability to motivate and inspire others, ability to problem solve and item ability to prioritize tasks. Relationship building is a strong theme for the majority of coaches. When referring to the literature it is important to note that instructional coaches are often left to rely on relationship-building alone to provide a platform for professional development; however, according to Neuman & Cunningham (2009), that is just one aspect of what facilitators need to do to support teacher learning. As mentioned in the discussion of RQ1, this is a level one activity (Denton & Hasbrouck, 2009).

When the skills, knowledge and attributes were clustered together in three emerging themes (1. Knowledge and intellect, 2. Leadership, professional, and coaching skills, 3. Talents, personality traits, and attitude). The cluster that was prioritized as most important was "talents, personality traits and attitude." This implies that coaches deem the personality, talents and strengths of the coach as more important than their knowledge, professional leadership or coaching skills. The skills identified in the literature review are consistent with the findings for RQ 2; instructional facilitators need several skills including communication, relationship building, change management, and leadership for teacher professional development (Gallucci et al., 2010). Furthermore,

when comparing the way coaches prioritized personality, talents and strengths of the coach as more important, this is also consistent with the viewpoint of Aguilar (2013) who describes coaching as an art with the power to transform to “completely change the substance, appearance and even essence of one thing into another” (Aguilar, 2013, p. xiii). During the interviews it was interesting to note that qualities not listed in the survey emerged. Coaches spoke about tenacity, patience, and having a “thick skin”, not taking things personally and being willing to repeat the same information and coaching over and over, sometimes for months and trust that the information or coaching is being absorbed before the desired change will be observed. These are some of the aspects of coaching as an art form that aligns with the viewpoint of Aguilar (2013).

An effective coach must possess certain analytical capacities and an ability to think sequentially. Coaching like creating art, requires intuitive capacities and an ability to see something that is not yet – but could be – in existence, and the willingness to surrender to the process and trust that a worthwhile product will emerge. (Aguilar, 2013, p. xii)

**RQ 3.** It is necessary to examine the way that coaches describe their role (RQ 1) as this affects how they prioritize their time and the skills they may value more than others (RQ 2) and therefore need more professional development to improve (Fullan & Knight, 2011). Coggins et al. (2003) suggested that coaches are not sufficiently trained in facilitation skills associated with instructional coaching. The effectiveness of training programs for coaches and specifically the necessary elements of successful programs has only been evaluated by a small number of researchers (CCSRI, 2007).

Section D of the survey, as well as interview questions 3 – 7, 9 and 11, as well as focus group prompts 2, 4 and 5 address the third research question. The learning

experiences with the greatest benefit to coaches, the highest mean responses in section D (4.00 or higher – very beneficial/extremely beneficial) were: Content specific courses like math foundations and reading foundations, on-the-job embedded learning experiences (learning by doing), the influence of prior experiences in teaching, individual, differentiated support from the district office, instructional strategies workshops ex. SIOP and RtI, collaboration and sharing among coaches at weekly meetings, district training for coaches – teacher leader academy, regular communication, updates and shared folders and interactions with a coach while still in the classroom. Formal education – graduate and undergraduate studies was rated as not beneficial in preparation for the role of coaching. Book studies were also rated low as being beneficial, however, during interviews several coaches expressed the need for book studies, but done in greater depth with follow-up discussions and implementation (question 11).

Several coaches reported a great improvement in their coaching abilities during the first year. When comparing the results of question 7, all the coaches (100%) indicated that the first year was a steep learning curve and they felt that they knew very little about the role or the skills needed for coaching. Another strong theme (closely related to coaching) is learning how to work with adults. Several coaches indicated that this was very difficult for them to adapt to at first (interview question 7). The ability to plan and anticipate what lies ahead came with experience, coaches reported that most learning was on-the-job through trial and error and that they believed there was no way to really prepare for the role of coach. Coaches also reported that the most learning takes place through interactions with others, specifically other coaches, through weekly meetings, collaboration and visiting other coaches to observe what they do and what coaching looks like in other settings (interview question 3 and 6). Coaches also reported

that they knew who the “experts” or “go to” coaches were. In situations where they were unsure of the correct course of action, these coaches would be their resources for information and learning. Coaches also reported learning from veteran teachers in their buildings.

Many situations arise where a coach may not know the right answer and may need to be prepared to engage in honest inquiry with teachers (Bean & DeFord, 2012). An openness to not always being the expert, and being willing to learn and develop their own capacity sets a good example to teachers, and allows for greater participation in group problem-solving discussions (Bean & DeFord, 2012). It is interesting to note that item 17 in section D of the survey (own research, reading and problem solving) had a relatively low rating, despite the fact that during interviews and focus group discussions several coaches mentioned that being a lifelong learner (section C, item 23) was an essential attribute to being an effective coach.

During interviews, two coaches responded that when they first moved into the role of coach and conducted observations, they were surprised by all the varied teaching styles and strategies they encountered. They only had experience of their own style and found it difficult to determine the quality of instruction at times. Providing feedback to someone who has a totally different teaching style than the coach was also reported as challenging. Due to the multifaceted, ambiguous, and contextually dependent nature of coaching, selecting professional development content and activities for coaches depends on the individual need of each coach. When coaches were asked about the professional development needs (RQ 4) – interview question 8 and 11, there were many varied responses. As was found in the literature review, there is not much information available about effective training for instructional coaches. “There is limited empirical literature

that examines instructional coaches' professional learning" (Gallucci et al., 2010, p. 923). The professional learning experiences that coaches need is clearly dependent on how they are used in schools and even how they define their own roles and functions

**RQ 4.** Four themes emerged when asking coaches about their professional development needs (interview questions 8-12):

1. Improving coaching skills: Practical real life observation of lesson or videos, how to analyze a lesson, give feedback and get feedback on coaching, direct intentional mentoring for new coaches, in-depth book studies with discussion, reflection and implementation.
2. Working with adults: Overcoming resistance to coaching, how to build trust and motivate people, how to handle conflict and crucial conversations.
3. Learning by observing: Visits to other coaches in the district or other districts, shadowing the learning from them.
4. Content knowledge: Meaningful integration of technology, engaging students with low attention spans, overcoming the impact of environment on students, math and reading foundations, training on state accountability requirements and documentation.

For interview question 11, the desire to improve as a coach was the most dominant theme for elementary (40%) and secondary (33.3%) coaches. Several coaches expressed the need for direct instruction and practical strategies to implement as well as feedback on their own coaching and seeing coaching in action. One coach suggested that coaches watched recordings of lessons and were then asked to analyze and develop suggested feedback they would give to the teacher and then that they in turn would be given feedback on how accurate they were. During discussion with elementary and

secondary coaches the term “tool kit”, meaning a set of skills to have ready in various situations when dealing with teachers, was used several times. Two coaches expressed the need to observe other coaches in action.

There were marked differences between the way elementary and secondary coaches responded to interview questions 8 and 9. Secondary coaches overwhelmingly indicated a need to learn how to work with adults, how to overcome resistance to coaching, how to get “buy-in”, how to handle conflict and have difficult conversations. Secondary coaches also indicated a desire to become better at “coaching itself” and deepen their knowledge of adult learning theory; how to plan and present quality professional development. It is interesting to note that although having knowledge of adult learning theory (item 21) was rated low in in section C of the survey, all of the secondary coaches that were interviewed mentioned that it was an important need for them (interview question 8).

Elementary coaches expressed a need for deeper content knowledge across all subject areas. However, in question 10, elementary coaches also indicated the need to know how to overcome resistance to coaching. One coach used the phrase wanting to “really reach teachers.” Some coaches indicated that they felt their interaction with teachers were shallow and that they wanted deeper discussions about real, lasting changes that needed to happen in some classrooms. During focus group discussions, secondary coaches discussed “teacher readiness” as something they had learned on the job. They described “readiness” as being the reason why teachers might resist coaching at a particular time, the timing and depth of information plays an important role in teacher learning. The theme of teacher ‘resistance to coaching’ can also be tied back to the findings of RQ1; the role conflict of coach as an evaluator negatively impacts the

relationship between teacher and coach (Tschannen-Moran & Tschannen-Moran, 2011).

### **Relating the Findings to the Conceptual Framework**

The transformative learning theory of Mezirow (1991) is the lens through which this study was conducted. The basic assumptions and roots of transformative learning theory originate in constructivism, humanism, and critical social theory (Simmons, 2013). Mezirow's theory "explains how adult learners makes sense or meaning of their experiences, how social and other structures influence the way they construe that experience, and how the dynamics involved in modifying meanings undergo changes when learners find them to be dysfunctional" (Christie et al., 2015, p. 10). The findings of the study revealed that the way teachers and coaches learn is very similar and consistent with transformative learning theory. The assumption of Mezirow's theory is that adults do not learn for the sake of acquiring knowledge itself. Learning is driven by the need to solve a problem or improve on something that is no longer working. During interviews, coaches discussed "teacher readiness" as key to learning. Coaching often starts with a discussion of data and feedback on observations; information that highlights a need for change or improvement. The term "teacher resistance to coaching" was mentioned several times during interviews and focus group discussions. Here again, it is evident that if a teacher does not perceive what they are doing in the classroom as needing improvement, they are not open to coaching or changing their practice. Several coaches described this resistance as conflict and that talking to teachers about data and providing feedback was uncomfortable to them. The low ratings on modeling and coaching in section B of the survey is further testimony of this phenomenon. Coaches find it stressful to approach another adult about their performance at work; as is evident from the findings that most tasks coaches spend their time on are level one or two tasks,

the least stressful and most informal, as defined by Denton and Hasbrouck (2009).

When asked about their own learning experiences, the two strongest emerging themes were that coaches learn on-the-job by doing through trial and error and from other coaches. This is consistent with the first assumption of transformative learning theory, constructivism. Constructivist assumptions are that meaning is developed internally over time. Perspectives are assimilated uncritically and may include distortions, stereotypes and prejudices (Simmons, 2013). Several coaches reported that the first year as coach was a “steep” learning curve. They had a narrow perspective of quality instructions as they had not been exposed to what all the other teachers in the school were doing in their classrooms. Some reported that they found it difficult to provide quality feedback and decide whether the instructional strategies they observed were really sound.

During interviews, skills and attributes that coaches value highly and were not listed on the survey, emerged. These included patience, tenacity, and willingness to repeat information and coaching over and over, trusting that the changes will come when the person is ready. Coaches also valued the personality of the coaches as more important than the knowledge they have. Optimism, energy, enthusiasm, open mindedness, good listening and communication skills were qualities mentioned by coaches. This is consistent with the second basic assumption of transformative learning theory, humanism. Some of the major humanist assumptions are that humans are inherently good, capable of making choices, have unlimited potential for growth, and have the urge for self-actualization (Simmons, 2013). Throughout the data findings from all three instruments, relationship building as a cornerstone of what coaches do, was a central theme, which further emphasizes the humanist assumptions of transformative learning theory.



The third assumption is critical social theory, which holds that the dominant ideology in a society becomes the norm by which humans make sense of their experiences (Simmons, 2013). When asked about their learning needs and current learning experiences the majority of coaches reported that most of their learning is from interactions with other coaches. Coaches expressed the need to visit and observe other coaches in action. This and the need to be a “better coach” as expressed during interviews aligns with the third assumption; coaches look at their peers and what they are achieving and doing in their building to rate themselves. Coaches also expressed that the support and guidance they receive at district level during weekly meetings is essential in helping them align their thinking with the district focus and seeing the “big picture.”

The stages or core elements of transformation are self-examination, critical assessment of assumptions, recognizing that discontent and the process of transformation are shared, exploring options, planning a course of action and reintegrating. All of these stages are part of the coaching process (Cox, 2015; Sammut, 2014). All the varied activities that coaches do form part of some or all of these stages. Section B of the survey provided measures of central tendency which described how coaches prioritize their time and which activities take up most of their time. Planning with teachers, providing resources, supporting PLCs are all actions that are part of these stages. Transformative learning theory is integral to adult learning and coaching, as the purpose of coaching is to effect lasting change by transforming instructional practice (Cox, 2015). Many coaches expressed the need to learn more about adult learning theory during interviews and focus group discussions.

### **Conclusions and Suggestions for Practice**

A clear consistent definition of the role of instructional coach is not possible due

to several factors; how the coach defines his or her own role, the personality, skills strengths, and abilities of the coach, the setting and needs of the school, the relationship with the principal, the unique needs of the teachers, district and state initiatives, the coaches' own mindsets and backgrounds. However, professional development of coaches is as important as the professional development of teachers, and as with teachers, this training needs to be differentiated. Each coach has a unique set of professional development needs based on the many factors listed above. In most cases, as described by transformative learning theory, learning takes place when a particular need arises. Often, learning happens through collaboration with other coaches and in some instances, with district level staff. Overwhelmingly, coaches indicated a desire to become more effective as a coach and to have more time to do so. Lack of time was an obstacle mentioned by all the coaches. This desire was not just due to the fact that coaches had many varied duties and responsibilities, but that teachers were also overloaded and time to meet during the school day to or do coaching reflections was extremely limited.

A key factor that impacts instructional coaching is teacher resistance to coaching. This factor is due to one of two reasons: either teachers do not perceive that there is a need for them to change their instructional practices (as described in the discussion on transformative learning theory), or the fact that coaches conduct classroom observations, which negatively impact the relationships that coaches have with teachers. This statement does not imply that classroom observations should not take place, but to bring awareness to the fact that role conflict makes coaching more problematic.

From the results of the quantitative and qualitative data, six suggestions for practice can be made.

1. A mentoring program for beginning coaches would make the transition from

the classroom to the role of coach smoother. Mentoring that includes observing other coaches and an informal internship would greatly benefit beginning coaches, as the findings suggest that there is no way to prepare a coach theoretically. On-the-job training is the way that most coaches reported learning.

2. Coaches expressed the need for observation of other coaches in various settings, to compare different approaches and ways to work with teachers. Coaches could benefit from clustering similar demographic setting together in small groups to meet at regular intervals in order to collaborate, share, and improve their own coaching.
3. Coaches could benefit from direct instruction and practical learning on how to analyze a lesson and develop meaningful feedback to provide to teachers. Coaches mentioned a “tool kit” with templates and tools to refer to in coaching situations. Practical training could include watching recordings of lessons, writing feedback and reviewing the feedback as a group.
4. Coaches need training on conflict management and change management.
5. Coaches expressed the need for deeper learning, not a multitude of topics shallowly covered in weekly meetings, but a few focused topics, covered in greater depth with implementation as an expectation. In-depth book studies followed by group discussion and implementation activities could form part of this deeper learning.
6. Coaches could benefit from training on adult learning theory and the implications it has on how they interact with teachers and how they provide professional development to teachers.

## **Limitations**

This study was conducted in a rural/suburban school district in North Carolina therefore the findings may not be generalized to other school districts with distinctly different demographics or settings. The model used by this school district is school-based; most schools have a full time, on-site instructional coach. Many school districts do not follow this model and coaches are based at the central office, serving multiple schools, therefore some of the findings of this study may not apply to such models of implementation.

A third limitation is the fact that this school district has a unique set of district initiatives and grant programs that constitutes a large portion of the duties of the instructional coaches. These initiatives and programs impact the data results, which limits the extent to which it can be generalized to other districts.

While the research questions were generalized in nature, with the focus on a wide range of professional development experiences, duties and skills, the instructional facilitators in this study are not subject specialists; the district does not follow the literacy or math coach model. The findings of this study may not apply to coaches who are highly specialized in one subject area. The researcher is an instructional coach in the district, therefore not a subject-specific coach. Personal experience and knowledge may impact the analysis and interpretation of the data in certain instances.

Finally, the sample size for this study was relatively small; only one school district was studied as a unique phenomenon. Although this mixed method study includes multiple data sources, there are limitations inherent in the use of surveys, interviews and focus group discussions. The likelihood that all participants taking a survey answer all items accurately and honestly is slim. The same is true for interviews

and focus groups. Participants may not give the interview their full attention, may forget some pertinent facts or feel hesitant to express their viewpoints honestly. The findings therefore apply only to the school district that was used for this research study.

### **Recommendations for Further Research**

As highlighted at the beginning of this research study, there is limited research on how to train coaches and develop their coaching skills and abilities (Gallucci et al, 2010; Neumerski 2013). Although this study found that the professional development needs of coaches in this district varied greatly and therefore a high degree of differentiation is needed, several coaches, even those with several years' experience as a coach, reported the need for practical step by step ways to observe lessons, analyze what they observe and provide meaningful feedback to teachers. Further research into the practical activities involved in the art of coaching as well as the impact of role conflict and overcoming teachers' resistance to coaching could be beneficial to those in the field. I also would suggest replicating this study on a larger scale to see if these results hold true to a larger population of instructional coaches.

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Appendix A

Instructional Facilitator Survey

Section A  
Demographic Information

Please indicate:

1. The school level that applies to you  
       \_\_\_\_\_ K – 5       \_\_\_\_\_ 6 – 8       \_\_\_\_\_ 9 – 12
2. Years of experience in education \_\_\_\_\_
3. Years of experience as an Instructional coach \_\_\_\_\_
4. Academic/professional qualifications:  
       \_\_\_\_\_ Bachelors   \_\_\_\_\_ Masters   \_\_\_\_\_ NBCT   \_\_\_\_\_ Other (describe)  
       \_\_\_\_\_
5. If you indicated “other” in questions 4, please specify  
       \_\_\_\_\_
6. Which subjects did you teach while still in the classroom?  
       \_\_\_\_\_
- 7a. Have you been employed at another school district as a teacher, if so indicate number  
       of years \_\_\_\_\_
- 7b. Have you been employed at another school district as a teacher, if so indicate number  
       of years \_\_\_\_\_
8. Age:  
       \_\_\_\_\_ 25 – 30   \_\_\_\_\_ 30 -35   \_\_\_\_\_ 35 – 40   \_\_\_\_\_ 40 – 45   \_\_\_\_\_ 45 – 50   \_\_\_\_\_ 50 +
9. Do you have an administrator’s license? \_\_\_\_\_ yes \_\_\_\_\_ no
10. Have you ever been named teacher of the year at your school? \_\_\_\_\_ yes  
       \_\_\_\_\_ no
11. Do you have experience in an administrative role?  
       \_\_\_\_\_ no   \_\_\_\_\_ yes, number of years \_\_\_\_\_

12. Do you have experience in any other role in education?

(Ex. Councilor, EC teacher, SAP, district office, etc.)

\_\_\_\_\_ no \_\_\_\_\_ yes, role: \_\_\_\_\_

### Section B

Describe your current role

Please indicate below how frequently you do the following activities.

Place a number in the box to the right as follows:

8 – Several times per day

7 – Once or twice daily

6 – Several times per week

5 – Once or twice per week

4 – Several times per month

3 – Once or twice per month

2 – A few times per year

1 – Rarely

0 - Never

1. Assist teachers to plan lessons/modules/activities	
2. Support the development of effective PLCs (Plan agendas, schedule meetings)	
3. Develop and implement teacher coaching plans	
4. Provide coaching feedback, verbal or written	
5. Work with small groups of students	
6. Conduct action research as a means to problem solve	
7. Conduct accountability tasks (checking meeting notes, sign in sheets, etc. )	
8. Check student progress monitoring folders/data	
9. Facilitate PLC meetings	
10. Create agendas for meetings ex. Faculty/leadership/goal teams/SIT team etc.	
11. Co-teach lessons with teachers	
12. Observe lessons and or conduct classroom walk-throughs	
13. Plan school based professional development activities and develop	

materials	
14. Collaborate and plan with the Blended Learning Coach or other specialists	
15. Facilitate the development of School Improvement Plans	
16. Complete paperwork for the referral process of students for IEPs	
17. Keep a coaching log or reflection journal	
18. Provide resources or materials to teachers	
19. Track the implementation of SIP deployment steps	
20. Assist teachers or students with tasks related to state requirements DEPs, personal projects, senior projects, read to achieve materials etc.	
21. Assist teachers in the creation of assessments (formative or summative)	
22. Create school wide templates/forms/spreadsheets for accountability and/or collaboration	
23. Conduct personal research/read literature on educational matters	
24. Provide support to teachers during parent/teacher conferences	
25. Provide assistance and or coaching to teachers regarding classroom management	
26. Model lessons for teachers to observe	
27. Collect school wide data and develop spreadsheets to track and analyze data	
28. Assist/coach goal teams and PLCs with the analysis of student data in order to inform instructional practices.	
29. Conduct or facilitate universal screening of students for learning gaps	
30. Help teachers to make classroom materials/games/activities etc.	
31. Facilitate the collaboration between beginning teachers and mentor teachers	
32. Work with teachers to promote greater use and understanding of curriculums	
33. Work with individual teachers or PLCs to analyze student data	
34. Perform tasks of an administrative nature (assist with busses, field trips etc.)	
35. Ensure accountability of mentor/mentee interactions, check logs etc.	
36. Spend time talking with individual teachers to support/encourage/empathize and build trusting relationships	
37. Assist teachers with classroom teaching tasks ex. making copies, grading etc.	
38. Meet with or communicate with parents	
39. Assist the front office staff (announcements, answering phones, helping students or visitors	
40. Covering classes for teachers who are absent	
41. Meet with the principal regarding instruction and/or coaching	
42. Create student groups/rosters for placement in interventions	

43. Plan and develop materials for district level professional development	
44. Record/Photograph ideas or best practices to share with teachers	
45. Facilitate instructional rounds/ peer observations	
46. Serve on committees at your school (core team, personal learning team etc.)	
47. Assist teachers with technology for instruction (on line resources, programs, applications, school net, home base, open class etc.)	
48. Present school based differentiated PD to small groups/PLC teams	
49. Assist with the orientation of new students ex. give tours/select clubs etc.	
50. Present PD at district/state conferences	
51. Serve as a testing coordinator?	
52. Collaborate with AIG coordinator or EC teachers	
53. Other (describe)	
54. Other (describe)	
55. Other (describe)	

Section C Skills, Knowledge and Attributes					
Rate the following skills, abilities or knowledge as important to being effective as an instructional coach on the following continuum.					
1	2	3	4	5	
Not Important	Somewhat Important	Important	Very Important	Extremely Important	
Skills, Knowledge and Attributes	1	2	3	4	5
1. Ability to problem solve					
2. Thorough knowledge of pedagogy					
3. Change Management skills and knowledge					
4. Clear personal vision and mission					
5. Thorough knowledge of adult learning theory					
6. Engaging and skilled public speaker					
7. Professional appearance, manner and confidence					
8. Ability to collect, analyze and interpret data					
9. Technology skills and knowledge					
10. Knowledge of school law					
11. Highly organized (planning, record keeping,					

prioritizing)					
12. Excellent communication skills both verbal and written					
13. Excellent listening skills					
14. Thorough knowledge of instructional design for PD					
15. Conflict management skills					
16. Subject knowledge across all subject areas					
17. Skilled at relationship building					
18. Well read and keeping up with new educational trends					
19. Knowledge and skills regarding classroom management					
20. Optimistic, energetic and enthusiastic					
21. Thorough knowledge of organizational improvement					
22. Skilled as a classroom teacher, evident from data					
23. Leadership talent, ability to motivate and inspire others					
24. Life long learner					
25. Humility and openness to criticism					
26. Ability to prioritize tasks					
27. A team player skilled at facilitating participation by all					
28. Other (describe)					
29. Other (describe)					
30. List the top six most important essential skills/knowledge/Attributes (1 being most important). Write the item number for each:					
1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____					
_____					

Section D Professional Learning Experiences					
Rate the following professional learning experiences as beneficial/valuable towards empowering you to be more effective as an instructional coach.					
1	2	3	4	5	6
Not beneficial	Somewhat beneficial	Beneficial	Very beneficial	Extremely Beneficial	NA

Professional learning experiences	1	2	3	4	5	6
1. Collaboration and sharing between IFs at weekly meetings						
2. District training for IFs (Teacher Leader Academy)						
3. On-the-job embedded experiences (learning by doing)						
4. The influence of your prior experiences in teaching						
5. Training related to grants (RtI and IMPACT workshops)						
6. Book studies, ex. Change Leader, Art of Coaching, Focus, etc.						
7. Instructional Rounds (visits to other IFs)						
8. District and state conferences (content or leadership)						
9. Content specific courses, ex. Math and Reading Foundations						
10. Instructional strategies workshops, ex. SIOP, RtI, etc.)						
11. Personal leadership courses, ex. Crucial Conversations, Trego						
12. Leadership Academy week optional sessions						
13. Mid-Year Review						
14. Curriculum Review Week						
15. Individual differentiated support from district office						
16. Regular communication, updates and shared folders						
17. Your own research, reading and problem solving						
18. Mentoring from a building leader						
19. Mentoring from district personnel						
20. Formal education undergraduate studies, advanced degrees						
21. Interactions with and IF while still in the classroom.						
22. Other (describe)						
23. Other (describe)						

Thank you very much for your participation in the survey.



Appendix B  
Interview Protocol

## Interview Protocol

### Introduction Script

Please read this out loud to the participant:

Thank you very much for your willingness to participate in the research study. The interview will be recorded and transcribed after which the audio recording will be deleted; you will not be able to be identified by your voice or any other means. The interview will be completely confidential and no participant's responses will be linked to a name of particular school. We will only know whether the responses were for elementary or secondary. Please feel free to express your honest opinion and add any comments, observations, suggestions or additional information that you may feel relates to this topic.

The purpose of study is to examine the perceptions of instructional facilitators regarding the value of a variety of professional learning experiences in meeting their professional development needs. The study will also examine how instructional coaches interpret their role and function in their building and district as well as the knowledge and skills they deem essential in the performing of their duties.

Turn on the audio at this time.

Read to participant: The interview should take about 20 minutes of your time based on a pilot conducted of this interview protocol. Before we get started, please indicate if you are elementary or secondary.

1. Talk about how you became an instructional facilitator. Was it a personal ambition or were you approached or inspired by someone else?
2. What are some personal strengths, attributes or even talents that you have that help you in your role as instructional coach?

3. Which learning experiences or learning opportunities have you had in your career in education or in your personal life that has helped to prepare you for this role?
4. Do you think that you have changed how you do things now as compared with when you first entered the position? Can you elaborate on this? (The interviewer could ask for reasons or examples if needed, depending on the response)
5. Did you have a role model or mentor whose example you followed or who provided advice?
6. Talk about the IF PLC group. Does the collaboration impact what you do? Describe how and why.
7. When you first started in the IF position did you feel well prepared for the role? Explain.
8. Are there areas or aspects of your position in which you wish you had more knowledge, insight or training?
9. Are there any barriers to success or frustrations that you experience? If so can you talk more about those?
10. If there were one thing that you could change in your daily round that would make you more effective, what would that be, why?
11. What types of professional learning experiences would help you to become more effective? Elaborate on those.
12. Is there anything else you would like to add?

Appendix C  
Focus Group Prompts

## Focus Group Prompts

### Instructions Script

Please read this out loud to the participants:

Thank you very much for your willingness to participate in the research study. The discussion will be recorded and transcribed after which the audio recording will be deleted; you will not be able to be identified by your voice or any other means. The interview will be completely confidential and no participant's responses will be linked to a name of particular individual or school. We will only know whether the responses were for elementary or secondary. Please feel free to express your honest opinion and add any comments, observations, suggestions or additional information that you may feel relates to this topic.

The purpose of study is to examine the perceptions of instructional facilitators regarding the value of a variety of professional learning experiences in meeting their professional development needs. The study will also examine how instructional coaches interpret their role and function in their building and district as well as the knowledge and skills they deem essential in the performing of their duties.

Turn on the audio at this time.

The interview should take about less than 30 minutes of your time, before we get started, please indicate if you are elementary or secondary.

### Focus group prompts

IMPORTANT – do not read these aloud to participants unless needed

These are not interview questions; they are conversation/discussion starters as well as ways of guiding the conversation back to the topic in case it digresses too far away from the focus.

1. Is a clear consistent outline and role description beneficial or even needed?
2. Prioritizing with a very full plate and a diverse list of tasks can be challenging, what strategies or supports can make this easier?
3. What are some personal traits/attributes or even talents that are essential to being an effective instructional facilitator?
4. What advice should be given to someone brand new to the role?
5. What professional learning experiences or training are vital to this role? If everyone present were a task force assigned to designing training modules for coaches, what would be our “must haves”, what would be at the top of the list, and why?

Appendix D  
Letter to Participants

Magdalena Steytler – GWU Research Study

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

March 1, 2015

Superintendent, Directors of Instructional Support and Instructional Facilitators  
Iredell-Statesville Schools

During the months of September and October 2105, I will be conducting research as part of my doctoral degree through Gardner-Webb University. The topic of the research focuses on instructional facilitators' perceptions of the extent to which varied professional learning experiences impact their efficacy.

The purpose of the study is to contribute to the limited body of research on the factors that impact the ability of instructional facilitators or coaches to be highly effective in their multi-faceted roles. The study will examine the perceptions of instructional facilitators regarding the value of a variety of professional learning experiences in building their capacity. The study will also examine how instructional coaches interpret their role and function in their building and district as well as the knowledge and skills they deem essential in the performing of their duties. Finally, the relationship, if any, between the two areas of investigation will be described.

Participants will be asked to complete a survey during one of the weekly meetings at the district office. Facilitators will also be asked to participate in either a personal interview or a focus group discussion. For the interviews 10 volunteers will be needed; 5 elementary, 3 middle and 2 high school facilitators. The participants will be randomly selected from the group of volunteers. For the focus group discussions at least 4 elementary and 4 secondary facilitators will be needed.

I greatly appreciate your participation and support with the hopes that my research will provide valuable information for our school district and districts across the country.

Kind regards,  
Magdalena Steytler



Appendix E

Data Result for Section B of the Survey – All Participants

*Measures of Central Tendency for Section B Items – ALL Responses (K-12 Coaches)*

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Item	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	2	4.00	5.00	5.16	6.00	8	1
2	1	5.00	5.00	5.32	6.00	8	1
3	0	2.00	3.00	3.52	5.00	8	1
4	2	4.00	5.00	5.76	8.00	8	1
5	1	2.00	4.00	4.12	6.00	8	1
6	0	1.00	2.00	2.08	2.25	8	2
7	2	3.00	5.00	4.60	6.00	7	1
8	0	3.00	4.00	3.96	6.00	8	1
9	1	5.00	5.00	5.13	6.00	7	2
10	3	4.00	5.00	4.83	5.00	7	2
11	0	2.00	2.00	2.54	3.25	6	2
12	2	4.00	5.50	5.50	7.00	8	2
13	2	3.00	4.00	3.80	4.00	6	1
14	0	4.00	5.00	5.04	6.00	8	1
15	2	2.00	3.00	2.96	3.00	7	1
16	0	1.00	3.00	3.16	6.00	8	1
17	1	4.00	5.00	4.44	6.00	8	1
18	3	4.00	6.00	5.68	7.00	8	1
19	1	3.00	3.00	3.32	4.00	6	1
20	0	1.00	3.00	3.16	5.00	7	1
21	1	2.00	3.00	3.28	4.00	6	1
22	1	3.00	4.00	3.64	5.00	6	1
23	1	2.00	3.00	3.92	6.00	8	1
24	0	1.00	2.00	1.80	3.00	4	1
25	2	2.00	4.00	3.80	5.00	8	1
26	0	2.00	2.00	2.40	3.00	6	1
27	1	3.00	4.00	4.28	6.00	7	1
28	2	3.00	4.00	3.92	5.00	6	1
29	1	2.00	2.00	3.00	4.00	7	1
30	1	2.00	3.00	3.04	4.00	6	1
31	0	2.00	2.00	2.72	4.00	7	1
32	1	3.00	4.00	4.28	5.00	8	1
33	1	3.00	4.00	4.16	5.00	7	1
34	2	2.00	3.00	3.84	6.00	8	1

35	0	1.00	2.00	2.12	3.00	7	1
36	1	6.00	7.00	6.68	8.00	8	1
37	0	1.00	3.00	3.28	5.00	8	1
38	0	2.00	3.00	3.24	4.00	6	1
39	0	2.00	3.00	3.72	6.00	8	1
40	1	2.00	3.00	3.20	4.00	6	1
41	3	5.00	5.00	5.48	6.00	8	1
42	0	2.00	3.00	2.80	4.00	5	1
43	2	3.00	3.00	3.44	4.00	5	1
44	1	2.00	3.00	3.24	4.00	8	1
45	0	2.00	2.00	2.36	3.00	6	1
46	2	4.00	5.00	4.84	6.00	8	1
47	3	4.00	5.00	5.36	7.00	8	1
48	2	3.00	4.00	4.16	5.00	8	1
49	0	1.00	2.00	2.32	3.00	8	1
50	0	1.00	2.00	1.60	2.00	3	1
51	0	0.00	0.00	0.79	1.25	4	2
52	0	2.00	2.50	3.08	4.25	8	2

---

Appendix F

Data Results for Section B of the Survey – Elementary

*Measures of Central Tendency for Section B Items – Only Elementary (K-5) Coaches*

Item	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	4	4.50	5.00	5.00	5.50	6	
2	5	5.00	6.00	5.82	6.00	8	
3	2	3.00	5.00	4.27	5.00	8	
4	4	4.00	5.00	5.55	7.00	8	
5	1	4.00	6.00	5.09	6.00	8	
6	1	2.00	2.00	2.18	2.50	4	
7	2	3.00	3.00	3.73	4.50	6	
8	3	4.00	6.00	5.27	6.00	8	
9	5	5.50	6.00	5.82	6.00	7	
10	4	4.50	5.00	5.09	5.50	7	
11	1	2.00	2.00	2.73	3.00	6	
12	2	4.50	6.00	5.46	6.00	8	
13	3	3.00	3.00	3.82	4.00	6	
14	3	4.00	5.00	4.64	5.00	6	
15	2	2.50	3.00	3.46	4.00	7	
16	2	4.00	6.00	5.18	6.00	8	
17	1	3.00	4.00	4.18	5.50	7	
18	3	4.50	6.00	5.64	6.50	8	
19	2	3.00	3.00	3.36	3.50	6	
20	0	3.00	5.00	4.09	6.00	6	
21	2	2.50	3.00	3.18	4.00	5	
22	1	3.00	4.00	3.91	5.00	6	
23	1	2.00	2.00	3.36	6.00	7	
24	0	1.50	2.00	2.00	2.50	4	
25	2	2.00	3.00	3.18	4.00	5	
26	1	2.00	2.00	2.64	3.00	5	
27	2	4.00	6.00	5.00	6.00	7	
28	3	3.50	4.00	4.46	5.50	6	
29	2	2.00	3.00	3.55	4.00	7	
30	1	2.00	3.00	3.00	4.00	5	
31	1	2.00	3.00	2.82	4.00	5	
32	4	4.00	4.00	4.64	5.00	6	
33	3	5.00	5.00	5.18	6.00	7	
34	2	2.00	3.00	4.27	6.50	8	
35	1	2.00	2.00	2.55	3.00	5	

36	4	7.00	8.00	7.27	8.00	8	
37	1	1.00	5.00	3.73	6.00	7	
38	1	2.00	2.00	3.18	4.50	6	
39	1	2.00	2.00	3.91	6.50	8	
40	1	2.00	3.00	3.18	5.00	5	
41	4	5.00	5.00	5.73	6.00	8	
42	2	2.50	4.00	3.55	4.50	5	
43	3	3.00	4.00	3.91	4.50	5	
44	1	3.00	3.00	3.46	4.50	5	
45	0	2.00	2.00	2.55	3.00	6	
46	2	4.50	5.00	4.73	5.50	6	
47	3	3.50	5.00	4.82	6.00	7	
48	4	4.00	5.00	4.64	5.00	6	
49	0	1.50	2.00	2.55	3.00	6	
50	0	0.50	1.00	1.18	2.00	2	
51	0	0.00	1.50	1.60	2.75	4	1
52	2	3.00	3.50	3.70	4.75	6	1

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Appendix G

Data Results for Section B of the Survey – Secondary

*Measures of central tendency for Section B items – Only Secondary (6-12) Coaches*

Item	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	2	4.00	5.50	5.29	7.00	8	1
2	1	4.00	5.00	4.93	6.00	8	1
3	0	2.00	2.50	2.93	4.50	6	1
4	2	4.00	6.50	5.93	8.00	8	1
5	1	2.00	3.00	3.36	4.50	8	1
6	0	0.00	2.00	2.00	2.00	8	2
7	2	4.25	6.00	5.29	6.00	7	1
8	0	2.25	3.00	2.93	4.00	6	1
9	1	4.00	5.00	4.54	5.00	6	2
10	3	4.00	5.00	4.62	5.00	6	2
11	0	2.00	2.00	2.39	4.00	4	2
12	3	4.00	5.00	5.54	8.00	8	2
13	2	3.00	4.00	3.79	4.00	6	1
14	0	3.25	6.00	5.36	8.00	8	1
15	2	2.00	2.00	2.57	3.00	4	1
16	0	0.00	1.50	1.57	2.00	4	1
17	1	4.00	5.00	4.64	5.75	8	1
18	3	4.00	5.50	5.71	7.75	8	1
19	1	2.25	3.00	3.29	4.00	6	1
20	0	1.00	2.00	2.43	3.00	7	1
21	1	2.00	3.50	3.36	4.75	6	1
22	1	2.25	3.00	3.43	5.00	5	1
23	1	3.00	4.00	4.36	6.00	8	1
24	0	0.25	1.50	1.64	2.75	4	1
25	2	2.00	4.00	4.29	6.00	8	1
26	0	1.00	2.00	2.21	3.00	6	1
27	1	3.00	3.00	3.71	5.00	7	1
28	2	2.00	3.00	3.50	5.00	6	1
29	1	2.00	2.00	2.57	2.75	6	1
30	1	2.00	2.50	3.07	3.75	6	1
31	0	1.25	2.00	2.64	4.00	7	1
32	1	3.00	3.00	4.00	5.00	8	1
33	1	2.25	3.00	3.36	4.00	6	1
34	2	2.00	2.50	3.50	4.00	7	1
35	0	0.25	1.50	1.79	2.00	7	1



36	1	5.25	7.00	6.21	8.00	8	1
37	0	1.00	2.50	2.93	4.00	8	1
3	0	2.00	3.50	3.29	4.00	6	1
39	0	3.00	3.00	3.57	4.75	8	1
40	1	3.00	3.00	3.21	4.00	6	1
41	3	4.25	5.00	5.29	6.00	8	1
42	0	1.25	2.00	2.21	3.00	5	1
43	2	2.00	3.00	3.07	4.00	5	1
44	1	2.00	2.50	3.07	3.00	8	1
45	0	1.25	2.00	2.21	3.00	5	1
46	2	4.00	4.50	4.93	6.00	8	1
47	3	4.25	6.00	5.79	7.00	8	1
48	2	3.00	3.50	3.79	4.75	8	1
49	0	1.00	2.00	2.14	2.00	8	1
50	0	2.00	2.00	1.93	2.00	3	1
51	0	0.00	0.00	0.21	0.00	2	1
52	0	1.25	2.00	2.64	2.75	8	1

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Appendix H

Data Results for Section C of the Survey – All Participants

*Measures of Central Tendency for Section C Items – All Responses (K-12)*

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Cluster	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	4	4.25	5.00	4.81	5.00	7	
2	3	4.00	4.00	4.46	5.00	7	
3	3	4.00	5.00	4.62	5.00	7	
4	2	3.00	4.00	4.04	5.00	6	
5	2	3.00	4.00	3.96	4.75	6	
6	2	4.00	4.00	4.04	4.00	6	
7	3	4.00	4.00	4.31	5.00	8	
8	3	4.00	5.00	4.58	5.00	7	
9	2	3.25	4.00	4.08	5.00	7	
10	1	2.00	3.00	3.12	4.00	6	
11	2	4.00	5.00	4.54	5.00	7	
12	3	5.00	5.00	4.85	5.00	8	
13	3	5.00	5.00	4.81	5.00	7	
14	3	4.00	4.00	4.31	5.00	7	
15	2	4.00	4.50	4.27	5.00	6	
16	2	3.00	4.00	3.69	4.00	6	
17	4	5.00	5.00	5.04	5.00	8	
18	2	3.00	4.00	3.92	4.00	7	
19	2	4.00	4.00	4.31	5.00	7	
20	3	4.00	5.00	4.65	5.00	8	
21	3	3.25	4.00	4.04	4.00	7	
22	2	4.00	5.00	4.50	5.00	7	
23	3	5.00	5.00	4.77	5.00	7	
24	3	5.00	5.00	4.81	5.00	8	
25	3	4.00	5.00	4.65	5.00	7	
26	3	4.00	5.00	4.72	5.00	7	1
27	3	4.00	5.00	4.62	5.00	7	

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Appendix I

Items Prioritized in Section C of the Survey for Item 30

*Items prioritized in question 30 (Section C) of the survey – Comparison of elementary and secondary responses*

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Item number	All participants	Elementary	Secondary
1	12	6	6
2	2	0	2
3	4	3	1
4	3	1	2
5	0	0	0
6	2	1	1
7	2	1	1
8	6	5	1
9	2	1	1
10	0	0	0
11	3	3	0
12	9	6	3
13	8	4	4
14	1	0	1
15	7	4	3
16	0	0	0
17	17	6	11
18	1	0	1
19	4	1	3
20	4	2	2
21	1	0	1
22	3	0	3
23	10	3	7
24	4	1	3
25	4	0	4
26	10	5	5
27	2	1	3

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Appendix J

Measures of Central Tendency for Section D Items – All Participants

*Measures of central tendency for Section D items – All responses (K-12)*

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Item	Min	1 <sup>st</sup> Qu	Median	Mean	3 <sup>rd</sup> Qu	Max	NA
1	2	4.00	4.00	4.15	5.00	5	
2	2	3.00	4.00	4.15	5.00	6	
3	3	4.00	4.50	4.50	5.00	7	
4	2	4.00	5.00	4.39	5.00	6	
5	3	3.00	4.00	3.85	4.00	7	
6	1	2.00	3.00	3.19	4.00	8	
7	2	3.00	4.00	3.81	4.00	6	
8	2	3.00	4.00	3.85	5.00	6	
9	3	4.00	5.00	4.62	5.00	7	
10	2	4.00	4.00	4.19	5.00	7	
11	0	3.00	4.00	3.89	5.00	7	
12	1	3.00	3.00	3.58	4.00	7	
13	1	2.00	3.00	3.00	3.00	8	
14	2	3.00	4.00	3.77	4.00	7	
15	2	3.00	4.00	4.23	5.00	8	
16	1	4.00	4.00	4.08	5.00	7	
17	2	3.00	4.00	3.92	4.00	7	
18	1	3.00	3.00	3.80	5.00	8	1
19	1	3.00	3.00	3.76	5.00	7	1
20	3	3.00	4.00	3.73	4.00	7	
21	2	3.00	4.00	4.00	5.00	7	

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Appendix K

Correlation Matrix of the Clusters of Section B and Items of Section D



*Correlation Matrix of the Clusters of Section B and Items of Section D of the Survey*

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Clusters	B-1	B-2	B-3	B-4	B-5	B-6	B-7
B- 1	1.000						
B-2	0.745	1.000					
B-3	0.618	0.694	1.000				
B-4	0.678	0.652	0.693	1.000			
B-5	0.581	0.471	0.364	0.433	1.000		
B- 6	0.568	0.706	0.471	0.597	0.436	1.000	
B-7	0.476	0.535	0.335	0.564	0.656	0.784	1.000
Items:							
D1	0.407	0.008	-0.043	0.159	0.487	0.279	0.563
D2	-0.455	-0.374	-0.567	-0.432	-0.300	-0.298	-0.158
D3	-0.026	-0.212	-0.252	0.131	-0.141	-0.023	-0.253
D4	0.402	0.184	0.012	0.278	0.264	0.317	0.181
D5	0.116	-0.041	-0.177	-0.184	-0.055	0.200	0.076
D6	0.142	-0.008	-0.145	0.062	0.271	0.237	0.416
D7	0.083	-0.087	-0.229	-0.035	0.119	0.283	0.328
D8	-0.323	-0.101	-0.168	-0.046	0.137	0.018	0.202
D9	-0.684	-0.385	-0.287	-0.339	-0.462	-0.110	-0.170
D10	-0.561	-0.418	-0.370	-0.151	-0.185	0.037	0.162
D11	-0.075	-0.024	-0.022	-0.014	-0.099	0.139	0.097
D12	0.119	0.067	0.000	0.141	0.508	0.223	0.384
D13	0.306	0.205	-0.110	0.063	0.454	0.453	0.431
D14	-0.182	-0.067	-0.082	-0.120	0.125	0.026	0.220
D15	-0.283	-0.417	-0.380	-0.209	-0.171	-0.355	-0.263
D16	0.207	0.386	0.308	0.414	0.397	0.478	0.406
D17	0.235	0.177	0.214	0.390	0.124	0.376	0.363
D18	-0.012	-0.002	-0.135	0.075	-0.059	0.232	0.090
D19	-0.174	-0.102	-0.185	0.142	-0.177	0.230	0.161
D20	0.522	0.506	0.424	0.370	0.256	0.344	0.249
D21	-0.114	-0.063	-0.047	-0.119	-0.083	0.057	0.015

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## Appendix L

### Correlation Matrix of Clusters in Section C and Items in Section D

*Correlation Matrix of Clusters in Section C and Items in Section D*

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Clusters	C-1	C-2	C-3
C-1	1.0000		
C-2	0.9040	1.0000	
C-3	0.8726	0.9298	1.0000
Items:			
D1	-0.0441	-0.0169	-0.0170
D2	0.1577	0.0010	0.0193
D3	0.5923	0.6205	0.7215
D4	0.5798	0.7358	0.7216
D5	0.6217	0.5176	0.5135
D6	0.7747	0.7422	0.6856
D7	0.4845	0.5350	0.4227
D8	0.3376	0.2781	0.2696
D9	0.5582	0.4056	0.4787
D10	0.5271	0.3959	0.4253
D11	0.5145	0.4550	0.3628
D12	0.5850	0.6553	0.6039
D13	0.7792	0.8106	0.7754
D14	0.6481	0.5822	0.6042
D15	0.5059	0.3803	0.4170
D16	0.6396	0.6311	0.5363
D17	0.6374	0.6104	0.5117
D18	0.4941	0.5635	0.4245
D19	0.5697	0.5313	0.5213
D20	0.6743	0.6291	0.5438
D21	0.4504	0.4324	0.3739

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Appendix M

All In Vivo Phrases Identified for Interviews

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Q 1 Responses - in vivo phrases identified: 13                      Frequencies: K-5    6-12    All

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Personal ambition considered for a while	2	2	4
A leadership course was taken	2	1	3
It was a difficult decision to leave the classroom	3	0	3
The motivation was a greater impact on education	2	2	4
Seeking a positive change in education in general	1	1	2
Seeking a new career challenge	3	2	5
Encouraged by colleagues to take the role	2	1	3
Became coach at current school, felt comfort with teachers	2	2	4
Encouraged by principal/administrator to take the role	2	2	4
A bridging step between teacher and administrator	2	0	2
Encouraged by previous coach to take the role	2	0	2
Was unsure of the decision to take the role at the time	1	2	3
Was noticed as a good teacher by performance data	4	4	8

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Q 2 Responses - in vivo phrases identified: 21                      Frequencies: K-5    6-12    All

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Ability to multitask	2	0	2
Not afraid to admit you don't have the answer	1	1	2
Ability to prioritize	2	1	3
Caring and helpful personality	1	1	2
Open to learning experiences/lifelong learner	1	2	3
Problem solving and "thinking on your feet"	2	1	3
Relationship building skills and approachable nature	4	4	8
Curriculum knowledge and experience/credibility	1	3	4
Experience in varied educational settings, grades and subjects	0	1	1
Data analysis skills	1	0	1
Organizational skills and detail oriented	3	1	4
Reliable, trustworthy/ integrity and able to create a "safe zone"	3	1	4
Understanding the dual role of coach and how to balance it	1	0	1
Technology knowledge and skills	1	1	2
Flexibility and adaptability	1	1	2

Team player and collaborative	3	0	3
Strong work ethic – to go above and beyond	1	1	2
A ‘thick skin’ not to take things personally	1	0	1
Empathy and a good listener	0	2	2
Good communication skills	1	2	3
Patience and perseverance	0	1	1

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Q 3 Responses - in vivo phrases identified: 23                      Frequencies: K-5    6-12    All

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Being a parent	1	2	3
Graduate and post graduate studies	2	0	2
Day to day support from other coaches/learning from peers	2	3	5
Ties to the community, parent body and church	1	1	2
Weekly coaches PLC meetings/collaboration and sharing there	1	0	1
Previous leadership roles (grade level chair, goal team leader, etc.)	2	0	2
Professional courses like Trego Ed. And Crucial Conversations	1	2	3
Content specific training courses (Math and Reading foundations)	1	1	2
Instructional strategies courses (ex. SIOP)	1	1	2
Participation in the district coach training pool	0	1	1
On the job learning in the coaching role	3	3	6
Mentoring from district level persons	1	0	1
There is no way to really be prepared for the role	1	1	2
Principal is/was a good mentor and resource	1	0	1
Learning from the previous coach while still in the classroom	2	0	2
Experiences in the classroom while still a teacher	1	0	1
District coach training was not helpful to prepare for the role	1	1	2
Learning for great teachers in their school	0	2	2
State coach training course	0	1	1
Social media connections with coaches in other districts	0	1	1
Regional and nation conferences	0	1	1
Assigned mentor	0	1	1
Personal research and reading	0	2	2

---

Q 4 Responses - in vivo phrases identified:17	Frequencies: K-5	6-12	All
Yes	5	4	9
No	0	1	1
Ability to predict, to anticipate busier times of the year	1	1	2
More sensitive to what is reasonable to ask teachers to do	1	1	2
Better at prioritizing	2	1	3
Learning to say no, realizing you cannot do everything	1	1	2
Slowly doing more coaching, not just being a “helper”	2	1	3
Desire to work more with students and teachers in classrooms	1	1	2
Relationship building is an ongoing, that need does not change	0	1	1
Better at how to ask teachers to do something	0	1	1
More experience in working with difficult/resistant people	0	1	1
Improved adult instruction skills	1	1	2
Improved organization, planning and structure	1	1	2
Better able to adapt to ongoing changes (local and state initiatives)	1	1	2
Better at coaching; analyzing lessons and quality, feedback	4	2	6
First year is spent mainly on relationship building and trust	2	0	2
Better understanding of state accountability requirements	1	1	2
Better at empowering teacher leaders and PLCs	1	0	1
Better at delivering PD, more confident, more differentiated	2	0	2
Q 5 Responses - in vivo phrases identified:11	Frequencies: K-5	6-12	All
Yes	5	5	10
No	0	0	0
Principal	1	3	4
Other coaches	3	2	5
Expressed a need for mentoring as a district gap area	0	1	1
More than one principal. Administrator	0	1	1
A teacher, while still a student	0	1	1
District level person	2	2	4
Life role models or family members	1	0	1
Previous Coach while still in the classroom	2	0	2
Assigned mentor	1	0	1

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Q 6 Responses - in vivo phrases identified: 15                      Frequencies: K-5    6-12    All

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Yes, Impacts daily practice	4	0	4
Sometimes/to some extent	1	2	3
Does not, not beneficial	0	3	3

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It helps for problem solving, trouble shooting, getting ideas	5	2	7
Helps to broaden one's view; different approaches and strategies	4	0	4
Helpful in sharing recourses	4	1	5
Getting ideas for implementation of district and state initiatives	3	3	6
Useful for breaking up the work load	1	1	2
It is preferred for elementary and secondary to meet separately	1	0	1
PLC offers support and encouragement, understanding listeners	3	0	3
Time to share out and collaborate is valued and beneficial	5	2	7
PLC group is a challenge; peers inspire you to improve	1	0	1
A need was expressed for more time to collaborate and share	1	4	5
A more structure, focused coaching program and activities needed	0	1	1
More clear expectations and role clarification is needed	0	1	1
Too many topics are shallow skimmed, no deep learning	0	3	3
Book studies not beneficial, no in-depth reflection/discussion	0	2	2
Desire for elementary and secondary to meet together	0	1	1

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Q 7 Responses - in vivo phrases identified: 14                      Frequencies: K-5    6-12    All

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No, not at all	1	3	4
Somewhat, the instruction part	2	1	3
Felt ready and prepared	0	0	0

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Class teaching experience helped	1	0	1
Felt unprepared to deal with adults and various forms of conflict	2	4	6
The first year was a steep learning curve	5	5	10
Initially feeling unsure/incompetent made many mistakes	3	1	4
Experience in previous leadership roles was helpful to prepare	1	0	1
Participated in district IF pool but it did not help to prepare	2	1	3
Most learning as on the job through trial and error	3	4	7
Learning is still ongoing, learning new things every day	1	1	2
Creating the one's own role as one goes along	1	2	3
There is a need for a structured first year mentoring program	1	2	3
Strong school leadership is crucial in the first year, when learning	1	0	1



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Q 8 Responses - in vivo phrases identified: 13	Frequencies: K-5	6-12	All
Dealing with adults, difficult conversations, conflict management	1	4	5
Deeper curriculum knowledge across all subject areas/grades	2	1	3
Deeper book studies with reflection, discussion, implementation	0	1	1
“How to” of building trusting relationships, what does it look like?	0	2	2
Training about ‘coaching itself’, best practices and a “tool kit”	0	2	2
How to provide PD to adults – adult learning theory and practice	0	4	4
Scheduling for interventions – how to get kids the help they need	0	1	1
Different formats to provide differentiated coaching and PD	0	1	1
Effective communication – overcoming the “evaluator” image	0	2	2
State requirements and legal aspects and the “why” behind it	1	0	1
How to get teachers to buy in and overcome resistance to coaching	1	3	4
More knowledge of EC and processes to support teachers better	1	0	1
Implementation processes and requirements for district/state	4	0	4

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Q 9 Responses - in vivo phrases identified: 15	Frequencies: K-5	6-12	All
Not enough time to get to classrooms and coach	4	4	8
Pulled in many directions, fragmented day, many varied duties	2	0	2
Not enough time to spend with PLCs	1	1	3
Role conflict, not teacher or admin, but seen as evaluator	1	2	3
Teachers’ don’t understand what coaches do and how to use them	0	1	1
Accountability/paperwork of initiatives/grants too time consuming	0	2	2
Building level duties (bus, cafeteria etc.) interfering with coaching	0	1	1
Teachers are resistant to coaching, avoiding the coach	0	2	2
Lack of communication; teachers do not read or respond to email	0	2	2
Teachers are overwhelmed; meetings, duties – no time to coach	1	2	3
Lack of strong leadership – no follow up after coaching	2	0	2
Poor communication with district staff, unsure who to reach out to	1	0	1
Training for coaches, either too soon/too much or too little/too late	1	0	1
Excessive paperwork/accountability for grants/state requirements	2	2	4
Constant changes, never becoming great/confident at anything	1	0	1

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Q 10 Responses - in vivo phrases identified: 10	Frequencies: K-5	6-12	All
More time to be in classrooms with students	4	4	8
Getting teachers to ‘buy in’ and overcoming resistance to coaching	2	1	3
Knowing what to do/how to help teachers to feel less overwhelmed	1	1	2
Less time spent on accountability for grants/state requirements	1	3	4
Not being seen as an evaluator/administrator but as support/help	1	0	1
Less administrative/operational duties	1	1	2
Focus is on struggling teachers only, but coaching should be for all	1	0	1
Teachers do not have common planning time to collaborate	0	1	1

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Q 11 Responses - in vivo phrases identified: 15	Frequencies: K-5	6-12	All
In-depth training on how to build strong, collaborative PLCs	0	1	1
Practical observations of actual lessons; giving quality feedback	1	1	2
Getting feedback on coaching; video recordings with reflections	1	1	2
Attending conferences and learning from other districts’ coaches	0	1	1
Training on ‘coaching itself’, practical ideas, strategies – a tool kit	0	1	1
Strategies to integrate technology into instruction meaningfully	0	1	1
Overcoming resistance; motivating people, building trust “how to”	1	2	3
Practical strategies to engage students with short attention spans	0	1	1
How to overcome the impact of environment and close gaps	0	1	1
Foundational skills (math, reading phonics, comprehension)	2	0	2
Shadowing other coaches to see their daily round and approaches	1	1	2
Direct, intentional training, mentoring and support for new coaches	1	0	1
Crucial conversations and conflict management training	1	0	1
More in-depth book studies with discussion and reflection	1	1	2
Training on implementation of district/state initiatives/requirements	1	0	1

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Q 12 Responses - in vivo phrases identified: 15	Frequencies: K-5	6-12	All
Feel supported by the district	1	1	2
Expressed the need to go to other schools to observe coaches	0	1	1
Would like to form small coaching groups (similar settings)	0	1	1

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Coaches need a voice in the content of the weekly meetings	0	1	1
Clear expectations of the role, oversight and feedback needed	0	1	1
Coaches need new learning, exposure to new trends, innovation	0	1	1
Training on how to deal with difficult, resistant people and conflict	0	1	1
Training on different coaching models ex. Subject specific,	0	1	1
Excessive, complicated, redundant accountability paperwork	1	0	1
Balancing the role of coach and member of leadership team	2	0	2
Coaching is a lonely job, unique role, you are a go between	1	0	1
A structured, intentional mentoring is need for new coaches	1	0	1
Isolation caused by roles/duties varying greatly across the district	1	0	1
Time is needed in PLCs for emotional support and encouragement	1	0	1
Conflict with administrators who do not always know what to look for in observations/disagreements over instructional practice	1	0	1

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Appendix N

All In Vivo Phrases Identified for Focus Group Discussions

**First prompt**

*Frequencies K-5 6-12 All*

*First Prompt - Emerging Theme 1:*

*A detailed role description is not possible, but a general description is beneficial.*

Responses – in vivo terms identified: 5

Detailed outline not possible, but a broad outline helpful	1	4	5
It is beneficial for teachers to understand the role better	1	0	1
It is beneficial for anyone new to the district and the role of coach	1	1	2
It helps to set parameters so that a coach can say “no” to certain tasks	1	0	1
Coaches are natural “helpers” and boundaries are necessary	1	2	3

*First Prompt - Emerging Theme 2:*

*The role varies greatly across the district due to various factors*

Responses – in vivo terms identified: 5

Several factors play a role in how the role varies across the district	1	3	4
Individual coaching from district staff impacts how the role is interpreted	1	0	1
The principal and the needs of the school determines the use of the coach	0	2	2
Coaches perform many tasks unrelated to the role, due to lack of staff	1	4	5
Coaches interpret the role by what they learn from other coaches	0	1	1

*First Prompt - Emerging Theme 3:*

*Coaches create their own role as they learn on the job and from other coaches.*

Responses – in vivo terms identified: 6

The first year is very difficult for coaches new to the role	1	1	2
New coaches have to create their own role as if fits in with their school	1	1	2
Coaches do a lot behind the scenes that they assume is commonly known	1	1	2
The sharing of strengths/talents of coaches impacts the roles of all coaches	0	1	1
The coach’s own background and the school culture impacts their role	0	1	1
Coaches new to the role have no clear job outline, they create their own	1	2	3

*First Prompt - Emerging Theme 4:*

*The role has evolved and changes significantly over time due to the implementation of district and state initiatives which does not allow for a clear, consistent role description.*

Responses – in vivo terms identified: 4


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District and state initiatives has changed the coaching role significantly	1	3	4
The implementation of initiatives has impacted available time to coach	2	4	6
District is shifting its focus back to time spent in classrooms and coaching	0	1	1
Due to many changes, defining the role to a new coach is problematic	1	4	5

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**Second Prompt**

*Frequencies K-5 6-12 All*

*Second Prompt - Emerging Theme 1:*

*Support and guidance from the district is essential to ensure that all coaches see the “big picture” and align with the district focus.*

Responses – in vivo terms identified :6


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Strong leadership of the coach PLC helps coaches to see the ‘big picture’	1	0	1
Strong leadership in the coach PLC helps coaches prioritize and focus	1	0	1
Coaches reach out to each other regularly for help in prioritizing	2	2	4
Coaches’ strengths vary, everyone knows who the “experts” are for help	1	1	2
The coach PLC collaborate to decide together how to prioritize the work	2	0	2
Coaches often feel isolated and rely on the PLC for support and advice	3	1	4

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*Second Prompt - Emerging Theme 2:*

*Strong, supportive leadership is needed at school level to help coaches to prioritize based on the needs of the school as well as staying aligned with the district’s focus.*

Responses – in vivo terms: 5


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School need to prioritize differently based on the needs of the school	2	1	3
Principals need to allow coaches to make decisions on how to prioritize	1	2	3
Principal’s leadership style determines the coach’s decision making ability	1	2	3
The ability to prioritize and make decisions is empowering	0	2	2
Strong leadership, guidance and structure at school level is vital	1	2	3

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**Third prompt***Frequencies K-5 6-12 All**Third Prompt - Emerging Theme 1:**Knowledge of adult learning theory and the ability to work with and lead adults.*

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Responses – in vivo terms: 5

The ability to build relationships and trust and being approachable	4	2	6
Adult learning theory is important, not many coaches are “well versed”	2	3	5
Knowing the teachers well, their strengths, learning style and readiness	1	5	6
Ability to provide differentiated, personalized coaching and PD	1	5	6
Ability to help teachers reflect and facilitate their own problem solving	1	1	2

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*Third Prompt - Emerging Theme 2:**Sound knowledge of curriculum and instruction.*

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Responses – in vivo terms: 3

Strong in curriculum and instruction/broad knowledge of all standards	2	2	4
Teaching skills are current and kept “sharp”	1	0	1
Ability to get teachers appropriate resources to meet their needs	1	0	1

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*Third Prompt - Emerging Theme 3:**Keen observational and communication skills.*

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Responses – in vivo terms identified: 3

Good communication, verbal and written using multiple ways and media	1	2	3
Good listening skills and ability to help others solve their own problems	3	1	4
Being alert, responsive and proactive in noticing needs and concerns	1	2	3

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*Third Prompt - Emerging Theme 4:**Flexible, adaptable and open to new learning*

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Responses – in vivo terms identified: 3

Coaches are lifelong learners	2	1	3
Flexibility, open mindedness, non-judgmental, can adapt to any situation	1	3	4
Willing to admit when you don't have the answer	2	1	3

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*Third Prompt - Emerging Theme 5:  
Professional leadership skills*

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Responses – in vivo terms identified: 3

Ability to collaborate, delegate and empower others	2	1	3
Ability to problem solve, coordinate teams and prioritize work	3	1	4
Ability to multi-task and work on various projects simultaneously	1	3	4

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*Third Prompt - Emerging Theme 6:  
Patience, tenacity and a positive, growth mindset*

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Responses – in vivo terms identified: 3

Patience – coaching takes time, sometimes years before you see changes	1	3	4
Coaches are optimistic, positive and morale boosters	1	1	5
There will be mistakes, coaches need to learn from them and ask for help	1	2	3

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*Third Prompt - Emerging Theme 7:  
Confidence and a level headed, realistic perspective of situations*

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Responses – in vivo term identified: 3

Not feeling inadequate if you don't have all the answers for teachers	1	1	2
Coaches need a “thick skin” and not take complaining personally	1	1	2
Know their circle of influence/circle of concern not become overwhelmed	1	1	2

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*Third Prompt - Emerging Theme 8:  
Highly visible, friendly and reaching out to others and being available to teachers*

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Responses – in vivo term identified: 2

Visible in the building, actively reaching out to get to know teachers	4	1	5
Always being available to teachers to provide friendly, prompt support	1	4	5

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## Fourth prompt

*Frequencies K-5 6-12 All*

### *Fourth Prompt - Emerging Theme 1:*

*The focus of the first year as coach is to build relationships and trust and to get to know the teachers while figuring out their role*

#### Responses – in vivo term identified: 4

The first year is spent on building relationships and trust, being a “helper”	0	1	1
It takes time to figure out what your role in the leadership team/building is	1	2	3
Despite district coach training, the on-the-job learning curve is still steep	0	2	2
Teachers need time to get to know the coach and how to utilize him/her	1	1	2

### *Fourth Prompt - Emerging Theme 2:*

*Working with adults is challenging, it takes time to learn how to deal with conflict and not to take things personally.*

#### Responses – in vivo term identified: 5

Accept that you will make mistakes as a new coach	0	1	1
Do not expect to have all the answers, have “go to” people, ask for help	1	1	2
Have a “thick skin” and do not take complaining or negativity personally	3	2	5
Expect pushback and resistance to coaching	1	2	3
Keep your teacher perspective, they are overwhelmed, time is limited	1	2	3

### *Fourth Prompt - Emerging Theme 3:*

*The dual role of a coach is unique; you are neither teacher nor administrator. It takes time to adjust to it, reach out to other coaches.*

#### Responses – in vivo term identified: 6

Relationships will change when you become a coach (existing school)	1	0	1
There will be times when you feel isolated even lonely	2	2	4
Figuring out how to balance the dual role happens by on-the-job learning	0	2	2
Build up a group of peers to reach out to and communicate regularly	1	1	2
Rely on the coach PLC, there are no “dumb questions”, ask when in doubt	1	2	3
Take care of yourself, keep a balance between work and family	0	2	2

*Fourth Prompt - Emerging Theme 4:*

*There is no detailed guide or manual. Be open and receptive to new learning; observe, shadow experienced coaches, reflect, keep a journal, make notes, ask for advice.*

Responses – in vivo term identified: 6


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Visit several coaches, shadow them, observe and learn from them	1	1	2
Be open-minded and ready to learn	2	2	4
Your role will be unique at your school; you learn your role by doing	1	4	5
Keep a record of your learning to reflect over; notes/journal/checklists	2	1	3
A detailed “manual” is not possible; each school and coach is unique	1	1	2
Self-reflect regularly, problem solve and learn from mistakes to improve	1	2	3

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**Fifth prompt**

*Frequencies K-5 6-12 All*

*Fifth Prompt - Emerging Theme 1:*

*Learning how to professionally develop and coach adults and*

Responses – in vivo term identified: 4


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Adult learning theory and its practical application	1	1	2
“Crucial conversations” training and how to deal with conflict	1	1	2
Overcoming resistance to coaching and achieve lasting change	0	1	1
Training on personality types and how to respond/relate to each	0	1	1

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*Fifth Prompt - Emerging Theme 2:*

*Deepening knowledge and understanding of quality coaching.*

*Practical, situational learning on how to become a better coach.*

Responses – in vivo term identified: 3


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How to observe a lesson and provide constructive, quality feedback	1	1	2
A practical coaching “tool kit” with templates/ideas for real life situations	2	1	3
Ongoing opportunities to shadow, observe and learn from other coaches	1	1	2

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*Fifth Prompt - Emerging Theme 3:  
Deepening knowledge of up to date curriculum, instruction and state and district requirements.*

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Responses – in vivo term identified: 3

Foundations training in reading and math	1	0	1
Broad overview of all subjects; a vertical alignment of grade levels	0	1	1
Training on correctly completing required documentation (state/district)	1	0	1

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*Fifth Prompt - Emerging Theme 4:  
Personal growth and mastering the skill of coaching*

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Responses – in vivo term identified: 4

In-depth book studies with reflection discussion and implementation	0	1	1
Effective self-reflection and how to reflect with teachers	0	1	1
How to balance the role conflict of coach/evaluator	1	0	1
Prioritizing/planning/organizing and time management	0	1	1

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