



Advancing Student Learning Through Distributed Instructional Leadership:
A Toolkit for High School Leadership Teams

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Madison, Wisconsin, USA

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To download this resource, please go to http://dpi.wi.gov/sprntdnt/pdf/distributed_leadership_toolkit.pdf

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Dear Educator,

In Wisconsin, we understand and support the importance of investing in innovation. Through a 2008–2010 Wallace Foundation grant, 16 Wisconsin urban high schools partnered with university faculty to engage in the promising practice of High School Leadership Teams. This innovative practice distributes many decisions and responsibilities to a team of high school instructional leaders. The team’s main focus is on advancing student achievement and success.

Advancing Student Learning Through Distributed Instructional Leadership: A Toolkit for High School Leadership Teams is one product from The Wallace Foundation grant. This toolkit will support school leaders in building and advancing the promising practice of leadership for learning teams. It provides a wide variety of ideas and activities designed to advance student learning and lead to every student a graduate. It is a powerful resource and appropriate for all school leaders, elementary through high school.

I personally want to thank the 16 Wisconsin high schools and their university partners for participating in The Wallace Foundation grant and putting theory into practice. By forming Leadership for Learning Teams, you advanced and supported our goal of making every student a graduate. This toolkit would not have been possible without all your hard work.

Sincerely,

Tony Evers, PhD
State Superintendent

Preface

Through a grant from The Wallace Foundation, between 2008 and 2010 the Wisconsin Urban Schools Leadership Project partnered university faculty with urban high school leadership teams to build leadership for learning through the implementation of a learning-related initiative in 16 urban high schools in Wisconsin. The Wallace Foundation and project partners have been impressed with the promise of building instructional leadership teams using existing high school structures as an effective strategy for high school reform. We offer this toolkit to support school leaders in building and advancing leadership for learning, and leveraging the capacity of administrative and teacher teams to become change agents to advance student learning and close persistent achievement gaps in their high schools.

The toolkit documents our work, and includes tools developed and used by school leaders and university partners to guide leadership development and build and focus distributed leadership for learning. A central assumption is that leadership for learning is advanced by clearly defining leader roles and responsibilities, providing mentorship, training and support to carry out these roles, and providing opportunities for participation in collaborative teams that provide a supportive context for building leadership and problem-solving capacities. The activities and suggestions provided can be used selectively or customized to reflect each school's specific context and needs.

American high schools exist in a rapidly changing economic, social, and political environment. Thus, even the most successful high schools need to reflect on this changing environment and its implications for teaching practice, curriculum design, and behavior management. Instructional leadership teams provide an opportunity for building strong leadership for learning that can respond to the rapid pace of change, and address the many very real challenges that present themselves daily in the modern high school. This toolkit provides a wide variety of ideas and activities designed to aid instructional leaders building leadership teams that can effectively focus on what should be the core activity of schools: advancing equity and excellence in student learning.

Wisconsin Urban Schools Leadership Project Partners

Districts

Green Bay Area Public Schools
Kenosha Unified School District
Madison Metropolitan School District
Milwaukee Public Schools
Racine Unified School District

State Education Agency

Wisconsin Department of Public Instruction

Universities

Cardinal Stritch University
University of Wisconsin–Madison
University of Wisconsin–Milwaukee

Statewide Organizations

Association of Wisconsin School Administrators

Partnering Schools and Principals

Green Bay Area Public Schools

East High School—Principal Ed Dorff
Southwest High School—Principal Bryan Davis

Kenosha Unified School District

Bradford High School—
Principal Sue Savaglio-Jarvis
Tremper High School—Principal Richard Aiello

Madison Metropolitan School District

East High School—Principal Alan Harris (2008–09)
Principal Mary Kelley (2009–10)
LaFollette High School—Principal Joe Gothard
Memorial High School—Principal Bruce Dahmen
West High School—Principal Ed Holmes

Milwaukee Public Schools

Bay View High School—Principal Robin Kitzrow
James Madison Academic Campus—
Principal Zannetta Cistrunk
Milwaukee High School of the Arts—
Assistant Principal in Charge Barry Applewhite
Riverside University High School—
Principal Dan Donder
South Division High School—
Principal Mark Kuxhause (2008–09)
Principal Maurice Turner (2009–10)
Vincent High School—
Principal Alvin Baldwin (2008–09)
Principal Matthew Boswell (2009–10)

Racine Unified School District

Horlick High School—Principal Angela Apmann
Park High School—Principal Dan Thielen

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Overview:

Distributed Instructional Leadership

Established leadership structures in most high schools are underutilized for instructional leadership and improvement. Leadership teams, including department chairs, administrative teams, and innovation teams, can play an important role in advancing leadership for learning at the high school level. The leadership of the principal is critical in building distributed instructional leadership, but the principal's leadership is also strengthened as s/he works to model effective leadership behavior and develop the instructional leadership capacity of teacher and administrator teams. This toolkit provides resources to build the instructional leadership capacity of three types of leadership teams in high schools:

- ◆ *Department chairs* are ideally situated to carry out distributed instructional leadership because of their unique position between school-wide policy and the classroom (Printy, 2008; Weller, 2001). Yet despite their potential to be important change agents and school leaders, the role of chair typically is ill-defined, and constrained to departmental management (budget, scheduling and facilities) and communication rather than instructional leadership. Department chair leadership team capacity is rarely developed, and chairs themselves receive limited training for their role as an instructional leader (Weller, 2001).
- ◆ The *administrative team*, including assistant principals, plays a number of important managerial and administrative roles in high schools. Despite the fact that assistant principals are important members of the pipeline for high school principal positions, they are rarely developed as instructional leaders (Marshall & Hooley, 2006). Building the instructional leadership capacity of the administrative team increases distributed instructional leadership as it strengthens the pipeline for the principalship. Newly defined administrative roles need to balance instructional leadership with important managerial functions that assistant principals play in managing the school organization (Celikten, 2001).
- ◆ A *school improvement or innovation team* is a third option for distributed instructional leadership development. Innovation team compositions vary from school to school, but typically include teacher leaders with emergent leadership skills that meet regularly around a specific instructional improvement agenda (McKeever, 2003). Team members need to have a clearly defined instructional leadership role and mission, and a commitment to advancing student learning outcomes in their own classroom, their department, and the school as a whole. The team may be formed for the purposes of building distributed instructional leadership, but attention needs to be paid to consistent membership, external legitimacy of the team, and communication with the school staff as a whole.

This toolkit is designed to support the development of distributed instructional leadership as a vehicle for advancing student learning in comprehensive high schools using these three types of leadership teams.

Distributed Leadership Action Step Checklist

1. Select an Initial Focal Leadership Team

- Establish an effective team structure



2. Define a Shared Vision

- Create an aligned culture
- Reframe leadership in terms of learning outcomes
- Communicate with stakeholders



3. Build the Capacity of Leaders and Leadership Teams

- Define leadership team roles
- Build individual leadership capacity
- Facilitate effective meetings
- Deal with difficult people
- Build the team
- Handle perceived roadblocks
- Assess team performance
- Ensure accountability



4. Mobilize Distributed Leadership to Analyze Problems and Plan Solution Strategies Using Best Available Data

- Build reliance on data to define the problem
- Develop testable hypotheses
- Use promising practices to address common problems
- Leverage distributed leadership to shape, implement, and refine promising practices
- Contextualize to reflect school developmental stage



5. Align Leadership Structures and Roles to Support Improvement Efforts

- School structures and roles
- District structures and roles

Distributed Instructional Leadership Action Step:

Select an Initial Focal Leadership Team

An initial focal team for instructional leadership development provides a leverage point for creating a school-wide commitment to leadership for continuous improvement in student learning outcomes. The principal should discuss the distributed instructional leadership initiative with staff and district administrators to create shared understanding and commitment to building the instructional leadership capacity of the focal team. Ultimately, the work of building instructional leadership will need to extend beyond the initial focal group, to ensure that there is consistent training, role expectations, and development across critical structures in the school and district.

The first task of strengthening leadership for learning is for the principal to select a focal leadership team for development from one of the following three structures:

1

Focal Team	Advantages	Disadvantages
Department Chair Leadership Team (See Appendix A)	<ul style="list-style-type: none"> ◆ Unique perspective connected to classroom, department and school-wide vision ◆ Recognizable team structure and legitimacy among teachers and staff ◆ Opportunity to reframe and clarify existing roles ◆ Regular meetings and time allocated for chair responsibilities ◆ Team typically represents teaching and learning throughout the school 	<ul style="list-style-type: none"> ◆ Chair selection processes may constrain strategic selection of team members ◆ Teacher contracts may prohibit peer evaluation so instructional leadership role must be carefully defined
Administrative Team	<ul style="list-style-type: none"> ◆ Recognizable team structure and legitimacy among teachers and staff ◆ Opportunity to reframe and clarify existing roles ◆ Regular meetings and time allocated for administrative responsibilities ◆ Team maintains a school-wide perspective and commitment ◆ Supervisory responsibility for teachers can facilitate school-wide implementation of instructional vision 	<ul style="list-style-type: none"> ◆ Administrative team disconnected from daily realities of teachers in the classroom ◆ Administrative responsibilities may compete with instructional leadership focus ◆ Administrative team member instructional leadership skill, interest, and legitimacy with staff may vary
School Improvement or Innovation Team	<ul style="list-style-type: none"> ◆ Team members can be selected from among motivated emergent leaders to provide school-wide and classroom perspectives ◆ Team can be designed to have a clear and specific focus on student learning ◆ Lack of competing administrative priorities for team members ◆ Team can be designed to represent teaching and learning throughout the school 	<ul style="list-style-type: none"> ◆ Team members may lack legitimacy as distributed instructional leaders ◆ Team members may lack access to other teachers to carry out instructional leadership role ◆ Need to set aside time for regular meetings and member responsibilities ◆ School may lack a long-term commitment if this is an ad hoc team

The Leadership Team Selection Tool highlights characteristics of the focal team prior to the instructional leadership initiative. This tool can be completed by the principal or the principal’s cabinet. The tool facilitates selection of a focal leadership team, and provides information for school leaders on strategic issues that may need to be addressed, and areas needing further focus or development to build an effective team.

Leadership Team Selection Tool

Focal Leadership Team: _____ (team name)

<p>Membership Who is on the team?</p>	
<p>Member Selection How are members selected? On what basis?</p>	
<p>Constituencies What constituencies are currently represented on the team? Who is not represented?</p>	
<p>Team Skills /Needs What is the skill set of team members? What skills need further development?</p>	
<p>Member Roles What is the current focus of the team, and what is currently expected of team members?</p>	
<p>Team Norms What norms historically characterize the team?</p>	
<p>Member Roles Outside the Team What commitments do team members have that complement or conflict with member responsibilities?</p>	
<p>Meeting Schedule/Resources How often does the team meet? What resources are available for team member development?</p>	
<p>Legitimacy/Credibility How does the school community view the team? Team members?</p>	

2

*Distributed Instructional Leadership Action Step:***Define a Shared Vision****Create an Aligned Culture**

The first step in building leadership for learning is creating a shared vision so that all members of the leadership team, and ultimately the whole school community, are working together to ensure that all children learn to the highest levels. The Shared Vision Planning Tool provides a guideline for setting leadership team agendas to build shared understandings and a shared vision that will guide the team and the school in moving forward to strengthen student learning.

The Shared Vision Planning Tool suggests a timeline and strategy for creating a shared understanding of the school's learning context and strategy for addressing gaps between the actual and the desired student learning outcomes. The timeline should be modified to reflect specific school needs and context, and may require adjustment to content or additional meeting time or days away to commit sufficient time and focus to team development, particularly for the agendas for sessions 4 and 5.

While the vision is a broad statement that reflects agreement about what the school should be, the initiatives developed in session 5 should take the team from this big picture perspective to a level of specificity that allows for focus on changes required in the structure of curriculum and instructional practices. Examples of what schools have focused on include: addressing 9th grade failure rates by developing and implementing consistent and regular formative feedback and opportunities for re-teaching to ensure that all students learn the required content, or working to increase the diversity of students in advanced placement or honors classes by actively recruiting and supporting students of color into courses that support their development to a high level.

Shared Vision Planning Tool

Timeline and Process for Building a Shared Vision	Leadership Team Agenda	Document Shared Understandings
<p>Session 1 Establish Shared Understanding of Student Learning Context</p>	<p>Review school data:</p> <ul style="list-style-type: none"> ◆ Demographics ◆ Disaggregated student learning outcomes ◆ Historical context and trends including areas of historical pride, learning successes and learning gaps (disaggregate by race, income, and learning needs) 	<p>Identify and prioritize key learning goals</p>
<p>Session 2 Review Existing Vision Statements & Learning Initiatives</p>	<ul style="list-style-type: none"> ◆ Review existing school, district, and state vision statements and learning goals ◆ Identify major current school/district initiatives 	<p>Identify areas of alignment and misalignment</p>
<p>Session 3 Explore Shared Values</p>	<p>Have team members:</p> <ul style="list-style-type: none"> ◆ Share a cherished memory of their time in the school ◆ Imagine they overheard a parent or community member talking about the school. What would they hope to hear? ◆ Share their personal vision for the school 	<p>Identify shared values across the stories</p>
<p>Session 4 Establish Shared Vision</p>	<ul style="list-style-type: none"> ◆ Identify areas for focus in the vision statement (e.g., school culture, leadership, instruction and graduates) ◆ Ask team members to dream about what the school could be. ◆ Conduct an affinity exercise to capture shared vision/best hopes for the school ◆ Identify a strategy to seek broad input from the school community 	<p>Have a subgroup draft a vision statement based on input from the leadership team and school community. At a later meeting,</p> <ul style="list-style-type: none"> ◆ Allow team and community members to review and reflect on the statement and make changes as appropriate. ◆ Analyze relationship between draft vision and district/state goals
<p>Session 5 Build Action plan</p>	<ul style="list-style-type: none"> ◆ Use new vision statement and school data to identify 2-3 specific goals for the leadership team 	<p>Elaborate how goals will be used to change classroom practice and improve student learning.</p>

Vision Statement

An example of a vision statement developed collaboratively by the leadership team in one of the partner high schools is shown below. The process of establishing a shared vision helps to bond team members and the school community around a core set of values and a collective responsibility for the future of their school.

This vision statement was developed collaboratively by a department chair leadership team in an afternoon through an affinity exercise. Vision statements can also be developed by the broader school staff, or school community. Whether the statement is developed by the focal leadership team or is a broader community effort, it is important to create a process in which the leadership team can collaboratively engage the staff for input on the development of the vision statement, and focus on building collective understanding and commitment to the vision that brings staff together and commits them to action. For this vision statement, each member of the leadership team was asked to provide post-it notes with their thoughts about the vision for their school in four broad areas: school culture, leadership, instruction, and graduates. The draft vision statement was then shared with the leadership team for any needed revision, and the team members shared and committed the vision statement to the whole school and community.

Sample Vision Statement

Our vision for our school is . . .

A **CULTURE** that promotes a strong inclusive community that values diversity and provides a safe place for students to explore intellectual and career opportunities and to excel academically

LEADERSHIP that is collaborative, shared, supportive, and guided by a clear vision

INSTRUCTION that is rigorous, creative, and student-centered
and . . .

GRADUATES who are connected to the community, recognized for excellence, and prepared to pursue a variety of future opportunities.

Being clear about what is and what is not the role of team members is critical to establishing new role expectations and providing time and opportunity to grow into the new leadership roles.

Reframe Leadership in Terms of Learning Outcomes

The principal plays an important role in defining the work of the leadership team, and the role of team members. Most high schools fail to clearly define leadership team member roles, and those that do typically focus on managerial and communication roles, rather than instructional leadership roles. For example, for department chairs, typical managerial roles include running department meetings, allocating meeting/performance space, providing input on class schedules and assignments, and purchasing. Typical communication roles include acting as a conduit for communication between administration and teachers/staff. The lack of a clearly defined *instructional leadership* role for leadership team members leads to ambiguity and frustration, which is exacerbated by a lack of training for role assignments.

This step involves developing a shared understanding of instructional leadership by sharing current role beliefs, expectations, and experiences, and defining a new instructional leadership role. In introducing the new role, it is helpful to make a clear statement about the changing role of the leadership team to the school staff. Within the leadership team, some short readings or discussions can help develop a shared understanding of the meanings of terms such as *instructional leadership* and *professional learning community*.

The following are examples of short articles that could be used to provide a foundation for a guided discussion about what it means to be an instructional leader:

- ◆ Jenkins, B. (Jan/Feb, 2009). What it Takes to Be an Instructional Leader. *Principal*.
- ◆ DuFour, R. (May, 2004). What is a “Professional Learning Community”? *Educational Leadership*.
- ◆ Pardini, P. (Fall, 2007). Higher Expectations Challenge Teachers and Students to Succeed. *National Staff Development Council Journal of Staff Development*, 28(4), 10–13.

Consistency of focus and attention to maintaining new role expectations are critical. Ambiguity and fears about the new role need to be recognized and addressed as the process unfolds. Opportunities should be made available for leadership team members to consider how a new instructional leadership role will affect existing roles and air their concerns about the new role, recognizing that team members may need support to build knowledge, skills, and credibility to carry out the new role. Identified issues should be acknowledged and addressed as the process unfolds. Being clear about what is and what is not the role of team members is critical to establishing new role expectations and providing time and opportunity to grow into the new leadership roles. The Role Tasks and the Want Ad on the following pages are useful tools for engaging in a discussion about the transition of department chair roles. They can be readily adapted for other leadership positions as well.

Role Tasks for Traditional Chair Versus Chair as Instructional Leader

Task	Traditional Chair Role	Chair as Instructional Leader
Communication	Relay information from administration	Create dialogue with department members related to instructional concerns
Relationship with fellow department chairs	Isolated, competitive, communicate during leadership team meetings	Supportive, collaborate to address concerns within entire school and individual departments
Relationship with administration	One way flow of information, hierarchical structure	Two way flow of information, work collaboratively to create solutions and identify areas of weakness
Relationship with members of their department	Provide a link to administration, allocate resources	Provide instructional support individually and departmentally, provide a channel of communication with administration
Knowledge of role definition and expectations	Unsure and variant across individuals	Secure and invested in their new role
Perception of role	Manager, information deliverer, limited change power	Facilitator within departments, member of a productive leadership team, able to impact change

Adapted from Kelley & Salisbury, 2009

Role Task Worksheet

What do these roles currently look like in our school? What do we need to work on to build the instructional leadership capacity of the leadership team?

Task	Current Role	Development Needs for Instructional Leadership Role
Communication		
Relationships with Leadership Team Members: Administrative Staff: Department Members:		
Knowledge of role definition and expectations		
Role as perceived by teachers and staff in school community		

Department Chair Want Ad

Wanted: _____ person to
(adjective, adjective, adjective)

serve as Chair of the _____ Department at
(Department Name)

_____. Must possess significant ability
(School Name)

to _____. Major duties

include _____ , _____ ,

and _____. Skills and experience at

_____ helpful,

knowledge of _____

required. Need to be able to work in an environment characterized by

Rewards include _____.

Primary challenges include _____.

Communicate with Stakeholders

While the primary focus of the work on changing the role of the leadership team occurs within the team, it is important that the change initiative be understood by the entire school staff to provide team members with legitimacy to carry out their role. Ongoing communication provides important support for the change process. Parallel role re-visioning and professional development for other staff may be needed in conjunction with the development of the focal leadership team.

School leaders should maintain clear communication channels and coordinate with district staff around the work of re-visioning the role of the focal leadership team so the district can provide appropriate resources and support the work of the team. When there is a lack of coordination between school and district leadership, there is a heightened potential for conflicting or competing goals to emerge, or for replication that can be perceived by emerging leaders as undermining the development of the distributed leadership initiative at the school level. The district role is to provide clear communication of their theory of action and direction, to guide and support improvements in teaching and learning, and to clarify district versus school roles in instructional initiatives. Clarity of direction, purpose, and role provides the school with the opportunity to invest in instructional improvement in concert with, rather than in conflict with, district direction. These issues are discussed further on page 76.

The following school-wide staff development activities provide opportunities to build school-wide esprit de corps and commitment to the leadership initiative.

Ongoing communication provides important support for the change process.

Instructional Leadership Communication Tools

- ✓ Conduct a community membership survey to identify the priorities of the school community and provide a sense of shared mission and vision. Share the results with staff, stressing elements of the responses that are shared across the staff.
- ✓ Create activities for the whole staff that remind teachers of the importance of making meaningful connections with students. These activities can also provide data for the school regarding the current state of adult-student relationships.
 - ◆ Post pictures of each student in a public place, such as a gymnasium or cafeteria.
 - ◆ Ask teachers to remove the pictures or otherwise identify students that they have a meaningful relationship with in the school. These are students that the teacher regularly communicates with beyond a brief greeting in the hall.
 - ◆ After teachers have had an opportunity to select their students from the wall, take stock of who is left on the wall. Which students do not have meaningful relationships with any teachers in the school?
 - ◆ Ask teachers to commit to getting to know specific remaining students.
 - ◆ Encourage them to maintain their relationships with the students they have identified.
- ✓ Develop a presentation of data to the entire school to create a shared understanding of school context, including:
 - ◆ school history (points of pride, little known facts, and historical context for the school)
 - ◆ demographic trends
 - ◆ achievement by demographic group (current and trend data)
 - ◆ key elements of district/school vision and school improvement strategy
- ✓ As the instructional leadership team begins its analysis of data, have subgroups of the team develop posters displaying data analysis and tentative directions for presentation to the school staff at a school-wide staff meeting.
 - ◆ The poster presentations can reflect current school initiatives, analysis of department-level data, or school-wide data related to the school improvement plan.
 - ◆ Groups of teachers rotate among the posters for a brief presentation of the data to gain a quick capture on the data analysis and directions of the leadership team.
- ◆ For information on this “science fair for grown-ups,” see Douglas Reeves, 2006, Center for Performance Assessment, www.MakingStandardsWork.com

3

*Distributed Instructional Leadership Action Step:***Build the Capacity of Leaders and Leadership Teams**

The roles of department chairs, assistant principals, or teacher leaders, and the mission of the focal leadership team need to be clearly expressed or developed as a part of the leadership team development process. Depending on the history, context, and leadership style of each school, the vehicle for this may vary. As an example, the following tools facilitate the process of defining the roles of the department chairs, and of the leadership team.

One approach is to begin with a discussion of the rationale for the shift in roles toward instructional leadership. Appendices A and B provide brief research summaries of the rationale for distributed instructional leadership and for a clearly defined role of department chair as instructional leader.

Once the rationale for the shift has been established, the leadership team may want to take stock of their current roles and responsibilities, and consider how the role would shift if it were more focused on instructional leadership. On the following pages, a Leadership Team Survey and Learning Team Quality Rubric for School Improvement provide data to examine current leadership team roles and relationships, and identify areas for further focus and development. The survey and rubric could be administered at the beginning and 1–2 years into the process of development of the instructional leadership capacity of the leadership team to assess growth and progress. They also provide a useful mechanism for modeling data collection and analysis to guide action and assess progress.

Leadership Team Survey

The following survey has been designed to better understand how leadership in your school can be enhanced to improve student learning. Your voluntary participation in the survey is greatly appreciated. Please note that the information you provide will be kept anonymous.

Part I. Your Leadership Role

1. Which of these positions best describes the formal role you represent on your high school's Instructional Leadership Team, (Check one)

<input type="checkbox"/> Principal	<input type="checkbox"/> Department Chair	<input type="checkbox"/> Guidance Counselor
<input type="checkbox"/> Assistant Principal	<input type="checkbox"/> Instructional Coach	<input type="checkbox"/> Other (Please specify)

2. In this role, the three most important things that I do are:

1. _____
2. _____
3. _____

Please circle the best response for each statement.

Statement	Not at all	To a Limited Extent	Somewhat	To a Moderate Extent	To a Great Extent
3. My leadership in this role influences instructional practices.	1	2	3	4	5
4. My leadership in this role advances major learning goals in the school.	1	2	3	4	5
5. Colleagues in my unit are receptive to changes in practices that advance student learning goals.	1	2	3	4	5
6. In my role, I have a clear understanding of my responsibilities as an instructional leader.	1	2	3	4	5

Part II. Your Leadership Team

7. What are the three most important responsibilities of the high school Leadership Team?

1. _____
2. _____
3. _____

Please circle the best response for each statement.

Statement	Not at all	To a Limited Extent	Somewhat	To a Moderate Extent	To a Great Extent
8. Our leadership team has a clear and focused vision.	1	2	3	4	5
9. The members of the leadership team- work together to solve problems.	1	2	3	4	5
10. My team colleagues are an important source of professional support.	1	2	3	4	5
11. Our team uses data to identify challenges and opportunities in meeting student learning goals.	1	2	3	4	5

Part III. Your School's Conditions

12. What are the three most critical issues around student achievement in your high school?

1. _____
2. _____
3. _____

Please circle the best response for each statement.

Statement	Not at all	To a Limited Extent	Somewhat	To a Moderate Extent	To a Great Extent
13. The principal's leadership provides clear direction for the work of our team.	1	2	3	4	5
14. The teachers in my school hold high expectations for learning for all students.	1	2	3	4	5
15. Teachers take responsibility for helping all students meet high expectations for learning.	1	2	3	4	5

Please circle the best response for each statement.

Statement	Not at all	To a Limited Extent	Somewhat	To a Moderate Extent	To a Great Extent
16. My department/unit has adequate resources to support our school's major learning and improvement goals.	1	2	3	4	5
Expertise	1	2	3	4	5
Materials	1	2	3	4	5
Money	1	2	3	4	5
Time	1	2	3	4	5

Source: Paul Bredeson, Hans Klar and Carolyn Kelley, University of Wisconsin–Madison

Learning Team Quality Rubric for School Improvement

Characteristic	Shared Mission, Vision, Values & Goals Focused on Student Learning	Collaborative Teams	Collective Inquiry Into Best Practice and Current Reality	Action Orientation: Learning by Doing
Descriptor	<ul style="list-style-type: none"> ◆ Clear direction ◆ Collective commitments ◆ Indicators, timelines and targets 	<ul style="list-style-type: none"> ◆ Common goals ◆ All members held mutually accountable ◆ Focused on the right issues 	<ul style="list-style-type: none"> ◆ Reflect on their beliefs and results ◆ Work jointly to plan and test actions and initiatives ◆ Coordinated actions 	<ul style="list-style-type: none"> ◆ Executes plans ◆ Tests collaborative team strategies in the classroom ◆ Demonstrates ownership of collective inquiry
Level 4: Institutionalizing the Learning Team	Includes all staff in the development, annual refinement, and articulation of school's mission, vision, values, and goals (all focused on student learning) which address how educators will work to improve the school and reinforce the purpose and collective responsibility that clarify why their daily work is so important.	Actively engages all members of the staff in at least weekly opportunities where teachers work together, independently, to analyze and impact professional practice in order to improve results for their students, team and school.	Provides leadership for staff to collaboratively engage in action research and reflection around best practices about teaching and learning, honest and accurate reflection on current practices and assessment of students' current level of learning. Staff takes action on reflections or assessments.	Embeds the Plan-Do-Study-Act process as a team and among all collaborative teams to support continuous, job-embedded learning. All teachers work in teams to test agreed upon strategies in the classroom.
Level 3: Implementing the Learning Team	Includes the majority of staff in nearly all the development, annual refinement, and articulation of the school's mission, vision, values, and goals (all focused on student learning) which address how educators will work to improve the school and reinforce the purpose and collective responsibility that clarify why their daily work is so important.	Actively engages all members of the staff in at least biweekly opportunities where teachers work together, independently, to analyze and impact professional practice in order to improve results for their students, team and school.	Provides leadership that enables staff to honestly reflect on the effectiveness of their current practices about teaching and learning and an accurate assessment of students' current level of learning. Staff may not take action on reflections or assessments.	Embeds the Plan-Do-Study-Act process as a team and among most collaborative teams to support continuous, job-embedded learning. A majority of teachers work in teams to test agreed upon strategies in the classroom.

Characteristic	Shared Mission, Vision, Values & Goals Focused on Student Learning	Collaborative Teams	Collective Inquiry Into Best Practice and Current Reality	Action Orientation: Learning by Doing
Descriptor	<ul style="list-style-type: none"> ◆ Clear direction ◆ Collective commitments ◆ Indicators, timelines and targets 	<ul style="list-style-type: none"> ◆ Common goals ◆ All members held mutually accountable ◆ Focused on the right issues 	<ul style="list-style-type: none"> ◆ Reflect on their beliefs and results ◆ Work jointly to plan and test actions and initiatives ◆ Coordinated actions 	<ul style="list-style-type: none"> ◆ Executes plans ◆ Tests collaborative team strategies in the classroom ◆ Demonstrates ownership of collective inquiry
Level 2: Initiating the Learning Team	Includes staff in the partial development, annual refinement, and/or articulation of the school's mission, vision, values, and goals which address how educators will work to improve the school and reinforce the purpose and collective responsibility that clarify why their daily work is so important.	Actively engages members of the staff in at least monthly opportunities where teachers work together, independently, to analyze and impact professional practice in order to improve results for their students, team and school.	Provides leadership that enables staff to discuss current practices and assessment of students' current levels of learning. Staff does not take action on reflections or assessments.	Is beginning to utilize the Plan-Do-Study-Act process as a team and may/may not with collaborative teams to support continuous, job-embedded learning. Few teachers work in teams to test agreed-upon strategies in the classroom.
Level 1: Not Initiating the Learning Team	Does not include staff in the development, annual refinement, and/or articulation of the school's mission, vision, values, and goals which address how educators will work to improve the school and reinforce the purpose and collective responsibility that clarify why their daily work is so important.	May not engage staff members in opportunities where teachers work together, independently, to analyze and impact professional practice in order to improve results for their students, team and school.	Does not provide leadership that enables staff to discuss current practices and current levels of students' learning.	Does not utilize the Plan-Do-Study-Act process as a team and may/may not with collaborative teams to support continuous, job-embedded learning. Few teachers may/may not work in teams to test agreed upon strategies in the classroom.

Source: Developed by Kristine Hipp and adapted for use by the Milwaukee Public Schools

Instructional leaders are educators who work to create coherent, purposeful, and sustainable learning environments for all students and staff.

Define Leadership Team Roles

By clearly defining the instructional leadership role of leadership team members, the team can build a shared understanding and commitment to working to improve teaching and learning in the school. The following definition of distributed instructional leadership was developed based on a review of research on effective instructional leadership and middle level leaders in schools (Council of Chief State School Officers, 1996; NCSL, 2009; NCLSCO, 2010; Maryland State Department of Education, 2005):

Distributed Instructional Leadership

Instructional leaders are educators who work to create coherent, purposeful, and sustainable learning environments for all students and staff.

Distributed instructional leaders at the high school level:

- ◆ Facilitate the development of a shared vision at school and department levels
- ◆ Use data to identify goals and assess instructional effectiveness
- ◆ Support student and adult learning
- ◆ Monitor progress in alignment of curriculum, instruction and assessment
- ◆ Promote continuous improvement in teaching and learning at the school and department levels

This definition provides a foundation for developing a site-specific definition of instructional leadership for the focal leadership team. The following pages provide examples of Assistant Principal and Department Chair Instructional Leadership Roles and Responsibilities developed by two partner high schools.

Sample Assistant Principal Roles and Responsibilities

AP Ms. Smith Art & Dance Department		AP Mr. Schmidt Music & Creative Writing Department		Spec Ed Liason
Grade Level—9	Grade Level—10	Grade Level—11	Grade Level—12	Grade Level – Spec Ed (all)
Assigned cohort of teachers— Observations/ Evaluations, Special Education, Operations (Crisis Plan, Fire Drill, Lock Down Procedure, etc. . .), Special Ed and Programming	Assigned cohort of teachers— Observations/ Evaluations, Special Education, Operations (Crisis Plan, Fire Drill, Lock Down Procedure, etc. . .), Special Ed and Programming	Assigned cohort of teachers— Observations/ Evaluations, Transportation, Para/ Ed. Assistance and Athletic Admin, Special Ed	Assigned cohort of teachers— Observations/ Evaluations, Transportation, Para/ Ed. Assistance and Athletic Admin, Special Ed	Coordinate Special Ed Schedules along with guidance counselors
Learning Walks	Learning Walks	Learning Walks	Learning Walks	Learning Walks
Provide instructional leadership through collaboration, academic monitoring of student success, analyzing data, providing support and resources for staff	Provide instructional leadership through collaboration, academic monitoring of student success, analyzing data, providing support and resources for staff	Provide instructional leadership through collaboration, academic monitoring of student success, analyzing data, providing support and resources for staff	Provide instructional leadership through collaboration, academic monitoring of student success, analyzing data, providing support and resources for staff	Provide instructional leadership through collaboration, academic monitoring of student success, analyzing data, providing support and resources for staff
Attendance Monitoring	Attendance Monitoring	Attendance Monitoring	Attendance Monitoring	Attendance Monitoring
Monitoring Suspensions	Monitoring Suspensions	Monitoring Suspensions	Monitoring Suspensions	Monitoring Suspensions
Portfolio of ongoing data collection	Portfolio of ongoing data collection	Portfolio of ongoing data collection	Portfolio of ongoing data collection	Portfolio of ongoing data collection
Special Assignments— Safeties, SES coordinator, Crisis Plan	Special Assignments— Safeties, SES coordinator, Crisis Plan	Special Assignments— Parents, Para-Professionals, HCAs, Educational Assistants	Special Assignments— Parents, Para-Professionals, HCAs, Educational Assistants	Special Assignments— SES coordinator, Crisis Plan

AP Ms. Smith Art & Dance Department		AP Mr. Schmidt Music & Creative Writing Department		Spec Ed Liason
Grade Level—9	Grade Level—10	Grade Level—11	Grade Level—12	Grade Level – Spec Ed (all)
Attend content area meetings, learning team, governance council, parent meetings, collaborative planning activities, administrative meetings (school based and district), professional development (school and district)	Attend content area meetings, learning team, governance council, parent meetings, collaborative planning activities, administrative meetings (school based and district), professional development (school and district)	Attend content area meetings, learning team, governance council, parent meetings, collaborative planning activities, administrative meetings (school based and district), professional development (school and district)	Attend content area meetings, learning team, governance council, parent meetings, collaborative planning activities, administrative meetings (school based and district), professional development (school and district)	Attend content area meetings, learning team, governance council, parent meetings, collaborative planning activities, administrative meetings (school based and district), professional development (school and district)
Scheduled meetings with guidance to discuss summaries of two-way communication with parents, students, staff, and community members	Scheduled meetings with guidance to discuss summaries of two-way communication with parents, students, staff, and community members	Scheduled meetings with guidance to discuss summaries of two-way communication with parents, students, staff, and community members	Scheduled meetings with guidance to discuss summaries of two-way communication with parents, students, staff, and community members	Scheduled meetings with guidance to discuss summaries of two-way communication with parents, students, staff, and community members
Keep minutes of ongoing collaboration with Teacher Leaders, teachers, support staff, parents, students, community members, and district personnel	Keep minutes of ongoing collaboration with Teacher Leaders, teachers, support staff, parents, students, community members, and district personnel	Keep minutes of ongoing collaboration with Teacher Leaders, teachers, support staff, parents, students, community members, and district personnel	Keep minutes of ongoing collaboration with Teacher Leaders, teachers, support staff, parents, students, community members, and district personnel	Keep minutes of ongoing collaboration with Teacher Leaders, teachers, support staff, parents, students, community members, and district personnel
Support school improvement plan, know the plan, teaching and learning strategies, collaborate with administrators and teachers	Support school improvement plan, know the plan, teaching and learning strategies, collaborate with administrators and teachers	Support school improvement plan, know the plan, teaching and learning strategies, collaborate with administrators and teachers	Support school improvement plan, know the plan, teaching and learning strategies, collaborate with administrators and teachers	Support school improvement plan, know the plan, teaching and learning strategies, collaborate with administrators and teachers

Sample High School Department Leader Definition

Department Chair Role:

To this point, the role of department chair has been more about representation than leadership. In the past, it has been to run your department, to come together as department chairs occasionally to provide feedback to the principal on different ideas being presented. Today you are being asked to shift to a leadership role in which you continue to effectively manage the department but that management becomes secondary to the role of being an instructional leader. This document seeks to better define your role as instructional leader.

In the past, the role of department chair has been more about representation than leadership.

Four Elements of Instructional Leadership:

1. Facilitate the development of a shared department vision and mission.
2. Collect and use data to identify goals, reflect upon instructional effectiveness and promote professional learning.
3. Facilitate a system that ensures alignment of curriculum, instruction and assessment.
4. Promote continuous and sustainable improvement.

Facilitate the development of a shared department vision and mission:

“Create a department that works toward a common goal.”

1. Develop a shared vision for the department aligned with the school vision that is student centered.
2. Work with colleagues to identify core values and create a foundation of understanding that allows the department to have basis from which to make informed decisions about course offerings, staff development, and instructional practice.
3. Seek support from building and/or supervising principal to coordinate facilitated dialogue and gain an understanding of school vision in a way that gives you confidence in working with colleagues to create a vision that is aligned.

Students deserve to know there is an aligned curriculum—it's not a lottery as to academic outcomes.

Collect and use data to identify goals, reflect upon instructional effectiveness and promote professional learning

1. Identify data aligned with department and school vision.
2. Work with building and/or supervising principal to thoroughly understand data set and its importance to develop effective ways of using data to promote professional learning.
3. Create clearly defined goals for student learning that are based on the assumption that changes in adult instructional practice will improve student learning.
4. Create a culture in the department of professionalism such that teachers actively seek data regarding student achievement to inform their instruction.
5. The department leaders' role here is not to make data evaluative. Rather it is to make data an integral tool in the development of professional learning. Think supportive, not evaluative.

Facilitate a system that assures alignment of curriculum, instruction and assessment

1. Students deserve to know there is an aligned curriculum—it's not a lottery as to academic outcomes. At the end of the day—it's a value of saying, "What students deserve."
2. Work with building principal and/or supervising principal to develop curriculum in the department that is aligned horizontally and vertically and is congruent with district vision for the curricular area.
3. Develop systems of monitoring for alignment via assessment, collaboration and professional development.
4. Note a significant distinction: When there are teachers in your department who are not engaging in the process, that is the role of administration. Your role is to support the teachers who are willing.

Promote continuous and sustainable improvement

1. Improvements must be living and addressed regularly (start each department meeting with it).
2. Reevaluate and evaluate on a regular basis with specialists.
3. Focus goals to a couple (1–2)—make it/them bite-size.
4. Work between departments on common goals to help address big picture.

Build Individual Leadership Capacity

As the role of the instructional leadership team members is being developed and refined, it is important to assure the members that they will not be asked to take on this leadership role until they have had an opportunity to fully understand the role, receive any needed training to perform the role, have ongoing support to overcome barriers, and had an opportunity to learn and practice the instructional leadership tasks in a safe environment.

The following are examples of short articles that could be used to provide a foundation for a guided discussion of instructional leadership and what it entails:

- ◆ Wagner, T. *Beyond Testing: The 7 Disciplines for Strengthening Instruction*, www.SchoolChange.org.
- ◆ National Council of Supervisors of Mathematics. *The PRIME Leadership Framework: Principles and Indicators for Mathematics Educators*.

Once team members understand what instructional leadership is, and have a clear understanding of their role as an instructional leader, the team should conduct a needs assessment to determine what barriers need to be addressed to enable team members to carry out this role. A key barrier is team member capacity and comfort with carrying out their new role, which can be addressed through training, team attention to planning meetings led by the instructional leaders outside of the leadership team, and application of nascent skills in a safe environment. Instructional leadership role tasks both reframe existing responsibilities and add new responsibilities to traditional leadership roles. Teacher leaders and assistant principals are often energized to do instructional leadership work, so they may be willing to take on additional commitments to carry out their new roles. In addition, however, it is important to take time to identify existing responsibilities that can be reassigned, eliminated, or reduced in scope in order to provide time for team members to take on their newly defined instructional leadership roles.

Teacher leaders and assistant principals are often energized to do instructional leadership work, so they may be willing to take on additional commitments to carry out their new roles.

Instructional Leadership Self-Assessment Activity

Please describe your current instructional leadership activities in your leadership role. Research on instructional leadership suggests five important roles for distributed instructional leaders. The purpose of this activity is to identify areas for professional learning and growth and to support future planning for the team’s work together to build distributed instructional leadership. The self-assessment activity is designed to support the development of the leadership team.

For each of the five areas, describe your current activities/strategies and list any challenges or questions each area of instructional leadership may raise for you.

Instructional leaders are educators who work to create coherent, purposeful, and sustainable learning environments for all students and staff.

In my leadership role (assistant principal, department chair, etc.), I work to:

Role	Current Activities	Challenges/Needs
Facilitate the development of a shared vision at school and department levels		
Use data to identify goals and assess instructional effectiveness		
Support student and adult learning		
Monitor progress in the alignment of curriculum, instruction and assessment		
Promote continuous school improvement in teaching and learning at the school and department levels		

While the specific skills that need to be developed, and barriers that need to be addressed are unique to each school and leadership team setting, skills identified across the partner schools include facilitating effective meetings and dealing with difficult people. Therefore, we focus on these skills here, recognizing that additional support may be needed to address the skills and barriers identified by the focal leadership team in your specific school setting.

Facilitate Effective Meetings

Meeting planning and facilitation are critical skills that enable high school instructional leaders, such as principals, assistant principals, department chairs, and other teacher leaders to effectively facilitate the development of instructional learning communities. All school leaders, from emergent to experienced, can work to strengthen meeting facilitation and communication skills. The following tool provides a structure for purposive meeting planning throughout the year.

Meeting Planning Tool: Creating a Purposeful Exchange

Guiding Questions	Short Term Goals (The Next Meeting)	Medium Term Goals (The Present Year)	Long Term Goals (Vision for Team)
How will the leadership team grow?			
What will the leadership team accomplish?			
What will be the focus of the agenda(s)?			
What action should team members be taking as a result of this meeting?			

This tool provides a structure for building a game plan for the leadership team that enables the principal to consider how each meeting builds to a bigger picture of development for the school and the leadership team. The tool should be revisited throughout the year, and adjusted as needed to continuously support advancing the school vision.

A critical step in building the leadership team is ensuring that the team is made up of members with the knowledge, skills, and commitment needed to lead distributed instructional leadership in the school.

Get the Right People on the Bus: Building the Leadership Team

A critical step in building the leadership team is ensuring that the team is made up of members with the knowledge, skills, and commitment needed to lead distributed instructional leadership in the school. Page 31 contains an example of an application form used by one of the partner high schools to recruit and select teachers to serve as Department Chairs. The tool is designed to ensure that teachers selected for the chair position understand and are committed to practicing instructional leadership.

Changing the role of leadership team members may mean reconstituting some of the team. In your school context, there may be more or less flexibility in determining team membership. In some cases, team members were chosen for their skills in their previous role, rather than for their capacity for instructional leadership. Team members may be contractually determined, leaving limited flexibility for the principal to “get the right people on the bus” (Collins, 2001).

Regardless of flexibility in selecting team members, the principal can work to ensure the commitment of team members and their understanding of the team’s vision. One approach that some of our schools took was to individually interview team members to listen to their thoughts and concerns about the leadership development process, and their role as instructional leaders. Example questions are provided on page 32. With this information, the meeting facilitator can approach the meeting with attention to building, rather than assuming member readiness (see Eller, p. 64; Bens, p. 108).

Team Building Tool: Individual Listening Sessions with Leadership Team Members

The purpose of this meeting is to invite you as a leadership team member to provide an update on how things are going in your role as instructional leader, and to see what kinds of support you need to continue to move forward.

1. How do you understand your new role as instructional leader?
2. Can you describe how, if at all, the focus on instructional leadership has changed your role?
3. Can you describe the work you have been doing with your department(s)? How has it been going?
4. How is the action plan developing in your department(s)?
5. How have teachers responded to the focused conversations on student learning in your department(s)? What challenges have you faced?
6. Are there any good things that have happened in your journey or obstacles you have overcome that you might like to share with the other leadership team members in a future meeting?
7. What kinds of supports do you need to continue to move forward?
8. Are there any other things you'd like to share that would help us continue to move forward?

Establish Meeting Norms and Ground Rules

Collaboratively established meeting norms can help to prevent and address conflicts and tensions that arise. Meeting norms provide an opportunity for team members to think about their purposive interaction with one another, and can help advance the team as a working group. Once established, meeting norms can also provide a frame of reference for how to treat one another outside the meeting, such as in establishing departmental or other team meeting norms.

Ground rules are similar to meeting norms, but they typically lack the level of ownership that norms do, and can sometimes be more difficult to enforce than norms. Establishing ground rules in advance can provide a reference point for holding team members accountable for maintaining an attentive, respectful, and constructive stance during difficult conversations. Teams should establish, post, and follow meeting norms and ground rules as an ongoing reference for constructive conversations. (For additional ideas on establishing meeting norms and ground rules, see Eller, p. 67–69 or Parker & Hoffman, pp. 118–133.) Sample norms and ground rules, and an example of one school’s team norms are shown below.

Meeting norms provide an opportunity for team members to think about their purposive interaction with one another, and can help advance the team as a working group.

Sample Meeting Norms and Ground Rules

Meeting Norms

Respect:

People

Ideas

Time

Begin/end on time

Have fun!

Clear purpose

Remember whole school focus (e.g. limit personal agendas)

Agree to disagree—don't make attacks personal

Use agreed-on framework for decision-making

Work toward understanding other perspectives

Balance participation

Compromise

Ground Rules

Listen as others speak

No sidebar conversations

Only one person can talk at a time

No name-calling or put downs

The Building Leadership Team Group Norms

Are about . . .

**Habits and behaviors all members of the BLT
will commit to practicing so that our collaborative time is
focused, purposeful, respectful, and productive**

1. Expectations of Self and Others

To respect other's ideas and contributions

2. Participation

To focus on and stay
Committed to our tasks

3. Attitude

To remain positive

So what? (What's important to understand about this?)

Working together collaboratively can be accomplished most effectively when there are agreed upon behaviors all members of the team will commit to practicing and to which all members will hold themselves and each other accountable.

Build an Agenda

Building an agenda format and maintaining consistent use of that format models effective meeting facilitation for team members as they lead their own meetings. The sample agenda format on the next page includes key elements of an effective meeting agenda.

The meeting begins with a warm-up that sets a tone for the meeting. The warm-up can be designed to support team and relationship building, or can begin to engage the team substantively in the meeting contents.

By building an agenda in advance of the meeting, the facilitator can develop the agenda to focus the team and the work of the school. In building the agenda, facilitators should ask themselves:

- ◆ Do agenda items advance school improvement and district goals to advance student learning?
- ◆ Does the agenda engage team members as instructional leaders?
- ◆ Does the agenda strengthen the team as a professional learning community?
- ◆ Can agenda items be addressed through written or electronic communications rather than taking up valuable meeting time?
- ◆ Has sufficient time been allocated to meaningfully address key agenda items?
- ◆ Am I modeling effective instructional leadership throughout the meeting?
- ◆ What am I asking team members to *do* as a result of the meeting? Are the activities low end management and communication (tell others what you heard), or higher level instructional leadership activities (lead a discussion about the material that engages the school community, advances instructional practices, and improves the experience of student learning in the school)?

The meeting should be designed to create opportunities for purposeful exchange to build toward longer term team goals. Typical high school staff meetings include a focus on sharing information on school or district initiatives, logistical planning or brain storming for upcoming events, and airing of concerns. Reframing the focus of meetings to build leadership for learning requires a focus on team building, developing a shared vision, analyzing data, and creating opportunities for team members to serve as instructional leaders rather than as communication agents for school and district administrators. This means leading school initiatives, developing and practicing leadership skills, planning implementation, and troubleshooting teaching and learning related issues.

As a final check on the focus of the meeting, the facilitators should ask themselves, “How have we designed the meeting to advance *student* learning?”

Consider the pay rate of everyone in attendance.

The knowledge outcome from the meeting needs to be worth the time spent.

Sample Leadership Team Agenda Format

Your High School
 Leadership Team Meeting Agenda
 Date, Location, Time

Leadership Team: List membership _____

Facilitator: Stephen

Time	Topic	Person(s) Responsible	Purpose
3:30–3:40	Warm-up: Role Play Formative Assessment in Math	John and Mary	Team Engagement in Meeting and Math Content
3:40–4:00	9 th Grade Math Achievement Data	Stan	Identify strengths and learning gaps; Model Leading Data Analysis with Teacher Teams
3:55–4:10	District and School Level Math Goals for 2010	Stan	Information
4:10–4:25	Draft Action and Implementation Plan	Stan	Feedback from Leadership Team
4:25–4:30	Next Steps Feedback/Parking Lot	Stephen	

<p>School Action Planning Goals Academic success for all students will increase by reaching:</p> <ol style="list-style-type: none"> 90% proficiency on the state test 90% graduation rate 90% access 90% participation on the ACT with a composite average goal of 23. 	<p>District Goals</p> <ol style="list-style-type: none"> Increase academic success for all students. Strengthen student-student and adult-student relationships. Strengthen post-secondary outcomes for all students.
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Team Norms

- Respect—people, ideas, time, decisions/present unified front
- Begin and end meetings on time
- Have fun!
- Clear purpose
- Remember whole school focus—limit personal agendas
- Agree to disagree
- Framework for decision-making—know where we are in the decision process
- Work to clarify ideas—seek to understand other perspectives
- Compromise

Create a Productive Exchange

The following represent actions the meeting facilitator can take to create a positive context for a productive exchange in the leadership team meeting. These actions also model effective meeting facilitation for team members.

Productive Meeting Checklist

- Distribute agenda ahead of time.
- Frame the agenda items to be clear about the focus of the item.
For example, “As we develop goals to address the math achievement data today, we need to remember to focus on defining the problem in terms of factors we can meaningfully impact, rather than things we cannot control.”
- Facilitate the meeting effectively.
 - ◆ Vary engagement strategies
 - ◆ Provide clear direction and guidance
 - ◆ Motivate team members
 - ◆ Model effective participation
 - ◆ Use a variety of decision tools to process information and build consensus
- Address distracters and deal with difficult issues.
Common distracters include:
 - ◆ Side bar conversations
 - ◆ Digressions
 - ◆ Pet complaints or ideas
 - ◆ Personal stories
 - ◆ Comments that silence others or limit creativity
- Address distracters.
 - ◆ Motivate the team
 - ◆ Clearly define meeting purpose
 - ◆ Engage everyone in the conversation
 - ◆ Develop and adhere to meeting norms and ground rules
- End meetings effectively.
 - ◆ Review major decisions, agreement and points covered in the meeting
 - ◆ Review new action items, including the members responsible and due dates
 - ◆ Set the time, date and site of your next meeting
 - ◆ Evaluate the effectiveness of the meeting
 - ◆ Thank the members

Sources, Eller, pp. 61–63; Parker & Hoffman, pp. 137–138.

Take Conversation into Action

Taking conversation into action requires recording the progress made at meetings and clearly identifying and assigning responsibility for next steps. For effective note taking, if possible, identify someone who can take notes during the meeting who is not also participating in the process. Notes should include key agenda items, discussion, action, and who is responsible for carrying out the action/next steps. Notes should be distributed to team members after the meeting, and provide guidance for follow-up at future meetings.

Another mechanism for modeling the use of data and advancing meeting effectiveness is to conduct short feedback assessments at the end of each meeting.

This can be a note card on which team members write responses to questions such as: What aspect of today's meeting was most useful to you, and why? What suggestions do you have for planning and conducting our next meeting?

The meeting facilitator should mentally assess ongoing team member commitment by considering levels of participation, tone of the conversation, and follow-through of team members. The facilitator can then follow-up with individuals to see if there are issues that can be resolved to continue to build the team.

In addition, the meeting facilitator should assess the role of each team member, what team members are being asked to do, and their ability to follow-through on those commitments. Are the tasks meaningful and effectively building and utilizing team member expertise? Do they respect team members' existing time commitments?

Finally, consider the bigger picture and adjust meeting agendas and instructional leadership development strategies accordingly. How does this meeting, or set of meetings, contribute to achieving the group vision or goals? Have meetings been designed to continue to build the professional learning community of the team? Of other groups within the school?

Meeting Facilitation References

- ◆ Bens, Ingrid. (2005). *Advanced Facilitation Strategies: Tools & Techniques to Master Difficult Situations*. San Francisco: Jossey-Bass.
- ◆ Eller, John. (2004). *Effective Group Facilitation in Education: How to Energize Meetings and Manage Difficult Groups*. Thousand Oaks, CA: Corwin Press.
- ◆ Parker, Glenn & Hoffman, Robert. (2006). *Meeting Excellence: 33 Tools to Lead Meetings that Get Results*. San Francisco: Jossey-Bass.
- ◆ Scholtes, Peter R., Joiner, Brian L., & Streibel, Barbara J. (2003). *The TEAM Handbook, Third Edition*. Madison, WI: Oriol: A SAM Group Company.

If a meeting is worth having, it is worth recording.

Investing in the time needed to build strong relationships among team members builds trust and understanding to create a safe space for difficult exchanges.

Dealing with Difficult People

Dealing with difficult people is an important leadership skill in any organization. Investing in the time needed to build strong relationships among team members builds trust and understanding to create a safe space for difficult exchanges. As distributed instructional leaders advancing learning initiatives, team members will also have to address conflict in their work with other teachers, staff, and community members.

Dealing with difficult people involves being able to initiate and carry out authentic communication strategies. A common authentic communication strategy addresses the point of conflict with carefully constructed language:

1. Begin with an observation: “When you. . .”
2. Own your own reaction to the other person’s behavior: “I feel. . .”
3. Define what you need from the situation: “I need. . .”
4. Be clear about what you want from the other person to address the situation: “Would you be willing to. . . ?”

Team members can practice using this technique within the team, for use in their interactions with others throughout the building.

Strengthening teaching and learning in high schools is a complex task that usually requires fundamental shifts in teaching practice. Recognizing that change is difficult and requires significant personal investment and risk taking can help foster supportive conversations and reduce tensions, but leaders also need to understand that not everyone moves at the same pace, and some people will push back harder than others when asked to participate in a change process.

Dealing with Difficult People

- ◆ Bens, Ingrid. (2005). *Advanced Facilitation Strategies: Tools & Techniques to Master Difficult Situations*. San Francisco: Jossey-Bass.
- ◆ Lasley, Martha. (2005). Difficult Conversations: Authentic Communication Leads to Greater Understanding and Teamwork. *Group Facilitation: A Research and Applications Journal*, No. 7, pp. 13–20.
- ◆ Parker, Glenn & Hoffman, Robert. (2006). *Meeting Excellence: 33 Tools to Lead Meetings that Get Results*. San Francisco: Jossey-Bass.

Build the Team

Team building is a critical component of distributed instructional leadership. Ideally, the team will come to rely on one another for ideas, problem solving, experimentation, professional learning and support. While team building is serious business, it requires the willingness to approach risk-taking with a positive attitude, and a willingness to laugh with and trust one another. Effective teams spend a lot of time together, and look forward to the opportunity to have fun, laugh, and occasionally cry together.

Build the Team Tool

Tool	Purpose
Food that says "I value your time." ◆ special snacks made by team members ◆ ethnic foods ◆ healthy snacks ◆ themed snacks	Use food choices that add fun and focus to a meeting session.
Personal Activities/Warm Ups ◆ Personal scavenger hunt ◆ Share something great that happened this week ◆ Draw a picture of a cherished memory from the school and share ◆ Line up in order based on how far from the school you were born ◆ Conduct the warm-up activity in another language, modeling first ineffective, and then effective instructional practices for non-native language learners. ◆ Do three sample math problems from the state assessment and discuss	Allow members to get to know one another better Provide a chance to laugh and take small risks in a safe environment Engage team members in the meeting or meeting content
Games ◆ Friendly group physical challenges (e.g., How can a large number of people fit on a small rug?) ◆ Hand out pieces to a sentence that has been cut up into three-character chunks, including spaces and punctuation marks. The team is asked to rearrange the chunks to form the original sentence. Use quotes that can inform your overall process. After team members correctly identify the sentence, have them discuss why the quote is important to the team.	Engage the team and build trust, cooperation, and a positive memory of teamwork
Toys ◆ Place toys on tables for participants to manipulate during the discussion, e.g., soft squeeze toys, Nerf balls, or folding puzzles.	Toys relieve stress, encourage creativity, and are fun.

Build the Team References

- ◆ Parker, Glenn & Hoffman, Robert. (2006). *Meeting Excellence: 33 Tools to Lead Meetings that Get Results*. San Francisco: Jossey-Bass.

As with structural and cultural shift in any organization, the process of transforming your focal team into a distributed instructional leadership team will be uneven.

Handle Perceived Roadblocks

As with structural and cultural shift in any organization, the process of transforming your focal team into a distributed instructional leadership team will be uneven. Numerous possible roadblocks may impede progress. These issues need to be addressed head-on to facilitate ongoing commitment and progress toward creating a team that can support continuous instructional improvement in your school. Some perceived or actual roadblocks identified include:

- ◆ time for meetings and for carrying out the instructional leadership activities.
- ◆ role-creep.
- ◆ perceived or actual lack of skills to perform the instructional leadership task.
- ◆ union contractual issues, particularly issues around evaluation or supervision of other teachers.
- ◆ leadership commitment to role re-visioning, including school-level and district level leadership.
- ◆ teachers' confidence that their time investment will not be undercut by district curricular initiatives.

The leadership team should invest time in identifying and addressing these roadblocks, including providing sufficient time for professional development, conflict resolution, role reframing, and identifying time that can be dedicated to the instructional leadership activities. One example of the kind of activity the leadership team could complete in small groups and discuss is identifying the Strengths, Weaknesses, Opportunities, and Threats (SWOT) associated with the role re-visioning.

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis Tool

Transitioning from your current role to the role of instructional leader provides significant opportunities and challenges. Complete the chart below, identifying the strengths, weaknesses, opportunities, and threats you see in mobilizing the leadership team to take on an instructional leadership role and be an important player in improving teaching and learning at your school.

Strengths	Weaknesses
Opportunities	Threats

Assess Team Performance

Team performance should be assessed by examining the quality of team interactions and progress on achieving team student learning goals. The table below provides a description of a team in name only compared to a “real” leadership team based on research on highly effective senior leadership teams in a variety of organizations. These definitions can provide a benchmark for determining team progress and effectiveness.

Effective Leadership Teams

Team in name only:	Real Leadership Team:
<p>Team Meetings:</p> <ul style="list-style-type: none"> ◆ This is a distraction from real work ◆ You “should” attend ◆ You look for ways to send a substitute ◆ You can’t wait for it to end <p>Between Meetings:</p> <ul style="list-style-type: none"> ◆ Your peers feel irrelevant ◆ You avoid your peers or collude with peers ◆ You rely on the leader to integrate 	<p>Team Meetings:</p> <ul style="list-style-type: none"> ◆ This is Vital Work ◆ You want to attend ◆ If you can’t be there, you trust the team members to represent your concerns ◆ You feel productive and energized <p>Between Meetings:</p> <ul style="list-style-type: none"> ◆ You solve problems jointly w/peers ◆ You manage team accountabilities ◆ You integrate yourselves

Source: Wageman, Nunes, Burruss & Hackman. (2008). *Senior Leadership Teams: What It Takes to Make Them Great*. Harvard Business School Press.

Maintaining your focus on student learning is critical for advancing meaningful leadership for learning.

A second critical assessment strategy is to assess impact on classroom practice and student learning outcomes from the work of the instructional leadership team. Maintaining the focus on student learning as the primary outcome of interest is critical to advancing meaningful leadership for learning. The focus of the work should be on changes in the ways that teachers understand and approach teaching effectiveness, including working toward a common vision, defining the problem with data, identifying evidence-based strategies for addressing the problem, using data to assess the effectiveness of the intervention strategy, and reflecting on learning outcomes to revision and modify the strategy (Kelley & Shaw, 2009).

Assess Team Performance References

- ◆ Eller, John. (2004). *Effective Group Facilitation in Education: How to Energize Meetings and Manage Difficult Groups*. Thousand Oaks, CA: Corwin Press.
- ◆ Kelley, Carolyn & Shaw, James. (2009). *Learning First! A School Leader's Guide to Closing Achievement Gaps*. Thousand Oaks, CA: Corwin Press.
- ◆ Lambert, Linda. (1998). *Building Leadership Capacity in Schools*. Alexandria, VA: Association for Supervision and Curriculum Development.
- ◆ Lambert, Linda. (2003). *Leadership Capacity for Lasting School Improvement*. Alexandria, VA: Association for Supervision and Curriculum Development.
- ◆ Five Fundamentals for School Success: Instructional Leadership. Consortium on Chicago School Research at the University of Chicago, <http://ccsr.uchicago.edu>

The team should also hold itself accountable for improvements in student learning outcomes as the ultimate and most important outcome of their work together.

Ensure Accountability

Important accountability measures for the leadership team members include the development of a culture of support and high expectations within the leadership team, as well as accountability from the principal and administrative staff for carrying out the responsibilities of the position of leadership team member. Team members should be expected to attend meetings, participate in the meetings, and carry out the distributed instructional leadership tasks with other teachers or staff as determined by the team process.

Meaningful accountability includes self-assessment, and the team should provide opportunities to share, reflect, and problem solve as part of their regular activities. With an atmosphere of open and honest exchange created through team building activities, team members should be willing to express concerns either as part of the open exchange in the meeting, or individually with the principal or meeting facilitator. Team members who fail to participate or feel they are not able to meet the challenge of distributed instructional leadership should be given an opportunity to be replaced by others who feel more willing or able to take on the challenge.

The team should also hold itself accountable for improvements in student learning outcomes as the ultimate and most important outcome of their work together. Regular opportunities for assessing the relationship between the team work and student learning should be provided as part of the team process.

The following page contains a tool for assessing leadership team goal progress. Teams can complete the tool on annual basis, and revisit it to reflect on progress toward goals. Additional tools on the following pages provide a description of Department Leader Professional Commitments, and surveys to be used in Department meetings to identify Department Leader goals, directions, and progress toward achieving those goals.

Tool for Assessing Leadership Team Goal Progress

Team/School Goal	Action	Desired Outcome	Analysis of Progress
Team Goal Example: Improve member meeting facilitation skills	Provide focused PD, model effective facilitation, and allow team members to lead meetings	More effective leadership team and department meetings	Pre and post surveys of teacher satisfaction with meeting facilitation/ effectiveness
School Goal Example: Reduce Freshman Failure Rates by 50% by 2014	Conduct root cause analysis with school, classroom, and individual student data; with staff, research and build strategic plan to address student failures	School-wide action and commitment and clear direction to reduce failure rates	Process data on implementation of plan; freshmen failure rate trend data; resources identified and mobilized to implement plan
Goal 1:			
Goal 2:			
Goal 3:			

Accountability Tool: Clarifying Department Leaders Professional Commitments

Due to the complex nature of coordinating high school academic achievement annually, a team of educational leaders will be identified. Each member of this Academic Leadership Team will serve as a Department Leader. Department Leaders coordinate academic subject areas as well as support organizations within our school.

The Professional Expectations of Department Leaders are to:

- ◆ Lead your department as the paramount activity in this role. Managing details will fall in place afterwards.
- ◆ Resolve potential conflicts with the belief that everyone wants to see the best in the situation, so deflate emotions and tackle issues objectively. Own the resolution and seek assistance only when the issue is larger than your sphere of influence.
- ◆ Respect confidential information that is gathered from your department or that is shared at the administration level with you.
- ◆ Commit to decisions made as an Academic Leadership Team. While individual input to building consensus may differ in discussions, we need to be supportive for the good of all.
- ◆ Make sure every decision you make with your department centers on student learning. What is best for teachers, parents and the community comes as secondary thoughts to our decision-making process.

The Professional Commitments of Department Leaders are to:

- 1. Lead academic improvement initiatives in your leadership/curricular area.**
 - a. Participate with district Teacher Consultants to ensure Common Assessments are consistent with curriculum and district standards and benchmarks, and that we implement them consistently.
 - b. Jointly gather and present data on student achievement with colleagues based on Common Assessments, and implement professional development based on these data and the Site Plan.
 - c. Facilitate discussions to determine new improvement areas for comprehensive student learning and strategies to support them.
 - d. Design a Department Improvement Plan that specifically supports the School Improvement Plan.
 - e. Lead monthly working sessions of your department, including minutes and attendance that is submitted to the designated administrator.
- 2. Maintain academic standards and expectations for your leadership area based on district/state standards.**
 - a. Align school efforts with the Site Plan, the district Strategic Plan, and state expectations.
 - b. Keep curriculum scope consistent with state assessment frameworks, district standards and benchmarks, and the customized needs of our school's students.
 - c. Create a recommended schedule of teaching assignments based on input from your department matched with the needs of our students. Understand that final teaching assignments will be made by administration.

3. Manage the department finances, materials, and space utilization.

- a. Coordinate all ordering of supplies and recommend expenditures for your leadership area.
- b. Develop and maintain a department budget consistent with school priorities and resources.
- c. Serve as a point of contact for your department regarding facility needs.
- d. Assist coordination of Standardized Testing preparation and implementation.

4. Develop additional academic expertise in your leadership area.

- a. Help screen potential applicants with administration and serve on interview teams for recruitment efforts impacting your leadership area.
- b. Designate support for the district Mentor Program, including staff who will serve as mentors to incoming educators in our school or at other sites.
- c. Provide personal connection with new educator welcoming and orientation in your department.

Accountability Tool: Department Leaders Goals Identification

In the month of September each year, each Department Leader will share this information with all members in the department to solicit input for identifying performance goals and department goals. Each member should have an opportunity to respond in writing to these prompts and a full department discussion should follow.

1. For what do you want this department to be known? Describe the reputation you want for this department.
2. How can the leadership of this department be more meaningful toward improving student learning?
3. What do you need to be successful in this department?
4. What has been in the way of your success in the past that your Department Leader(s) needs to know?
5. What is one goal you believe this department needs to focus on so that students learn no matter what?

Accountability Tool: Department Leaders Feedback Assessment

In the month of April each year, each Department Leader will collect this information from all members in the department to solicit feedback about the performance of your department and you as a leader. Each member should have an opportunity to respond in writing to these prompts and a full department discussion should follow. This information will be the subject of conversation between the Principal/designee and each Department leader regarding performance improvements for the following year, and appropriate designation of leadership for the upcoming school year.

1. How well have the accomplishments of this department reflected your department goals and beliefs?

Low 1 → 2 → 3 → 4 → 5 → 6 → 7 → 8 → 9 → 10 **High**

Explain:

2. How well has your Department Leader led the accomplishments you expected as a department?

Low 1 → 2 → 3 → 4 → 5 → 6 → 7 → 8 → 9 → 10 **High**

Explain:

3. How well has your Department Leader met your personal needs to remain effective?

Low 1 → 2 → 3 → 4 → 5 → 6 → 7 → 8 → 9 → 10 **High**

Explain:

4. How well has your Department Leader worked through issues or perceived barriers?

Low 1 → 2 → 3 → 4 → 5 → 6 → 7 → 8 → 9 → 10 **High**

Explain:

5. How well has your Department Leader supported new ideas to work toward your department goals?

Low 1 → 2 → 3 → 4 → 5 → 6 → 7 → 8 → 9 → 10 **High**

Explain:

4

Distributed Instructional Leadership Action Step:

Mobilize Distributed Leadership to Analyze Problems and Plan Solution Strategies Using Best Available Data

Build Reliance on Data to Define the Problem

A key element of building instructional leadership teams is creating a data-driven decision-making culture. The focus on meeting adequate yearly progress goals and the development of data warehouses in many districts have drawn attention to student learning outcomes in terms of state test scores. Test scores, particularly when disaggregated by income, race, and learning needs, provide an important benchmark for assessing overall school performance. But in order to use data to narrow the focus for school improvement efforts, data analysis needs to go beyond test scores.

Bernhardt (2005) identifies four main types of data that should be examined to inform instructional leadership efforts:

- ◆ Demographic data: What does our student population look like?
- ◆ Perceptual data: What do students and staff perceive about the teaching and learning environment in our school?
- ◆ Student learning data: What are the student learning outcomes?
- ◆ Process data: What programs, opportunities, and experiences do we offer to students and staff in our school?

Bernhardt encourages the analysis of data across these four types. To understand mathematics achievement in the school, for example, one might examine student learning data broken down by demographic groups, student perceptions about mathematics, and teacher perceptions about students who achieve or do not achieve in mathematics, and process data about tracking, mathematics instruction at the high school and feeder schools, and the experience that successful and less successful students have in mathematics.

A critical element in the data analysis process is getting teaching staff to recognize that they have a lot of useful information that could inform improvements in the teaching and learning environment. Beginning with the leadership team's work to prioritize areas that need improvement at the school level, departments and teacher working groups can look at student grades, attendance, curriculum and instruction for successful and unsuccessful patterns that could be addressed through action research at the department or classroom level.

The following three tools provide mechanisms for collecting and analyzing data and identify areas for future focus and development by the leadership team. The first tool provides guidelines for conducting a student learning audit; the second guides a discussion of the experience of low, middle, and high achieving students in the school. School contexts and programs differ dramatically, and may focus more on the low or high achieving students, failing to challenge other students to move to the next level. The third tool is a survey to assess the quality of the professional learning community among staff in the school.

Audit Tool: Advancing Equity and Excellence in Student Learning

Step 1: Understand the Baseline

- ◆ What is the distribution of students, recent historical trends, and expected future trends by:
 - ✓ Race/Cultural Background
 - ✓ Poverty
 - ✓ English Language Learners
 - ✓ Students with Identified Special Learning Needs
 - ✓ Student Mobility

Step 2: Examine Disaggregated Outcomes

- ◆ What are the patterns in student learning, attendance, grades and promotion rates across the demographic groups identified above?
- ◆ What are key turning points in student learning outcomes? (e.g., for students who fail to graduate, what grade level, course, or set of circumstances are key risk factors?)
- ◆ What areas can the school focus on to address the gap between your vision or preferred state (all students learning to high levels) and the current reality (the vision gap)?

Step 3: Analyze Current Practices

- ◆ For the areas identified in Step 2, what current practices are in place for students who are not meeting achievement goals? Use the low, middle and high achieving student discussion guide (p. 56) to examine current practices, opportunities, and barriers to learning in your school.
- ◆ What underlying processes affect student access to effective learning opportunities?
 - ✓ Student assignment to experienced teachers
 - ✓ Behavior management practices and policies
 - ✓ Assignment processes and structure of special education programming
 - ✓ Formative assessment practices
 - ✓ Ability to move between tracks or trajectories

Step 4: Consider Common Problems in Advancing Equity and Excellence in Student Learning that May Need to be Addressed.

- ◆ Is high quality co-teaching occurring between special and regular education teachers?
- ◆ Does grouping for services result in separation of students by ability level or background?
- ◆ Do teaching practices address each individual child's learning needs?
- ◆ Is there a culture of formative assessment to ensure that each child's learning is appropriately scaffolded and supported?
- ◆ What supports are in place to ensure that a child with a history of failure can achieve at the highest levels?
- ◆ (How) does the school identify and fuel each child's passion for learning?

Step 5: Answer Summary Questions

- ◆ How will you work to help students who struggle?
- ◆ How will you work to help students who are not challenged?
- ◆ How will you improve access to high quality teaching and learning for all students?

Adapted from Kelley, C. & Shaw, J. (2009). *Learning First! A School Leader's Guide to Closing Achievement Gaps*. Thousand Oaks, CA: Corwin Press, pp. 68–69.

Addressing the Needs of Low, Middle, and High Achieving Students Discussion Guide

What is the experience of high, middle and low achieving students in your school?

The purpose of this discussion is to focus on the experience of specific groups of students in your school, including opportunities and obstacles to learning; points of pride and things that need attention. Break into three groups, and have each group answer the questions below focusing on low achieving, middle achieving, or high achieving students. Report out results of your discussion and identify areas of strength and need for additional attention for each group.

Part I. Understanding the Experience of [High, Middle, or Low] Achieving Students

- ◆ Who are the [high, middle or low] achieving students?
- ◆ What does their academic program look like?
- ◆ What opportunities does your school offer for these students? (courses, participation in extra curricular activities)
- ◆ What are the strengths of the curriculum/academic program?
- ◆ What problems or challenges exist?
- ◆ What attitudes and behaviors are characteristic of this group? (strengths? challenges?)
- ◆ What learning outcomes does this group achieve? (range of learning outcomes, strengths, challenges)

Part II. Strengthening the Experience of [High, Middle or Low] Achieving Students

- ◆ What additional data do you need to fully understand the strengths and challenges of the curricular program for these students? How can you ensure that every child has access to high level classes?
- ◆ How can you ensure that students who need additional help to succeed are identified and supported?
- ◆ What data do you need to inform programming at your school to support successful outcomes, including through the transitions to high school and beyond?

Professional Learning Communities Assessment Tool—Revised (PLCA-R)

Directions:

This questionnaire assesses your perceptions about your principal, staff, and stakeholders based on the dimensions of a professional learning community (PLC) and related attributes. This questionnaire contains a number of statements about practices which occur in some schools. Read each statement and then use the scale below to select the scale point that best reflects your personal degree of agreement with the statement. Shade the appropriate oval provided to the right of each statement. Be certain to select only one response for each statement. Comments after each dimension section are optional.

Key Terms:

- ◆ Principal = Principal, not Associate or Assistant Principal
- ◆ Staff/Staff Members = All adult staff directly associated with curriculum, instruction, and assessment of students
- ◆ Stakeholders = Parents and community members

Scale: 1 = Strongly Disagree (SD) 2 = Disagree (D) 3 = Agree (A) 4 = Strongly Agree (SA)

STATEMENTS		SCALE			
	Shared and Supportive Leadership	SD	D	A	SA
1.	Staff members are consistently involved in discussing and making decisions about most school issues.	0	0	0	0
2.	The principal incorporates advice from staff members to make decisions.	0	0	0	0
3.	Staff members have accessibility to key information.	0	0	0	0
4.	The principal is proactive and addresses areas where support is needed.	0	0	0	0
5.	Opportunities are provided for staff members to initiate change.	0	0	0	0
6.	The principal shares responsibility and rewards for innovative actions.	0	0	0	0
7.	The principal participates democratically with staff sharing power and authority.	0	0	0	0
8.	Leadership is promoted and nurtured among staff members.	0	0	0	0
9.	Decision-making takes place through committees and communication across grade and subject areas.	0	0	0	0
10.	Stakeholders assume shared responsibility and accountability for student learning without evidence of imposed power and authority.	0	0	0	0
11.	Staff members use multiple sources of data to make decisions about teaching and learning.	0	0	0	0
COMMENTS:					

STATEMENTS		SCALE			
	Shared Values and Vision	SD	D	A	SA
12.	A collaborative process exists for developing a shared sense of values among staff.	0	0	0	0
13.	Shared values support norms of behavior that guide decisions about teaching and learning.	0	0	0	0
14.	Staff members share visions for school improvement that have undeviating focus on student learning.	0	0	0	0
15.	Decisions are made in alignment with the school's values and vision.	0	0	0	0
16.	A collaborative process exists for developing a shared vision among staff.	0	0	0	0
17.	School goals focus on student learning beyond test scores and grades.	0	0	0	0
18.	Policies and programs are aligned to the school's vision.	0	0	0	0
19.	Stakeholders are actively involved in creating high expectations that serve to increase student achievement.	0	0	0	0
20.	Data are used to prioritize actions to reach a shared vision.	0	0	0	0
COMMENTS:					
STATEMENTS		SCALE			
	Collective Learning and Application	SD	D	A	SA
21.	Staff members work together to seek knowledge, skills, and strategies and apply this new learning to their work.	0	0	0	0
22.	Collegial relationships exist among staff members that reflect commitment to school improvement efforts.	0	0	0	0
23.	Staff members plan and work together to search for solutions to address diverse student needs.	0	0	0	0
24.	A variety of opportunities and structures exist for collective learning through open dialogue.	0	0	0	0
25.	Staff members engage in dialogue that reflects a respect for diverse ideas that lead to continued inquiry.	0	0	0	0
26.	Professional development focuses on teaching and learning.	0	0	0	0
27.	School staff members and stakeholders learn together and apply new knowledge to solve problems.	0	0	0	0
28.	School staff members are committed to programs that enhance learning.	0	0	0	0
29.	Staff members collaboratively analyze multiple sources of data to assess the effectiveness of instructional practices.	0	0	0	0
30.	Staff members collaboratively analyze student work to improve teaching and learning.	0	0	0	0
COMMENTS:					

STATEMENTS		SCALE			
	Shared Personal Practice	SD	D	A	SA
31.	Opportunities exist for staff members to observe peers and offer encouragement.	0	0	0	0
32.	Staff members provide feedback to peers related to instructional practices.	0	0	0	0
33.	Staff members informally share ideas and suggestions for improving student learning.	0	0	0	0
34.	Staff members collaboratively review student work to share and improve instructional practices.	0	0	0	0
35.	Opportunities exist for coaching and mentoring.	0	0	0	0
36.	Individuals and teams have the opportunity to apply learning and share the results of their practices.	0	0	0	0
37.	Staff members regularly share student work to guide overall school improvement.	0	0	0	0
COMMENTS:					
STATEMENTS		SCALE			
	Supportive Conditions—Relationships	SD	D	A	SA
38.	Caring relationships exist among staff and students that are built on trust and respect.	0	0	0	0
39.	A culture of trust and respect exists for taking risks.	0	0	0	0
40.	Outstanding achievement is recognized and celebrated regularly in our school.	0	0	0	0
41.	School staff and stakeholders exhibit a sustained and unified effort to embed change into the culture of the school.	0	0	0	0
42.	Relationships among staff members support honest and respectful examination of data to enhance teaching and learning.	0	0	0	0
COMMENTS:					

STATEMENTS		SCALE			
	Supportive Conditions—Structures	SD	D	A	SA
43.	Time is provided to facilitate collaborative work.	0	0	0	0
44.	The school schedule promotes collective learning and shared practice.	0	0	0	0
45.	Fiscal resources are available for professional development.	0	0	0	0
46.	Appropriate technology and instructional materials are available to staff.	0	0	0	0
47.	Resource people provide expertise and support for continuous learning.	0	0	0	0
48.	The school facility is clean, attractive and inviting.	0	0	0	0
49.	The proximity of grade level and department personnel allows for ease in collaborating with colleagues.	0	0	0	0
50.	Communication systems promote a flow of information among staff members.	0	0	0	0
51.	Communication systems promote a flow of information across the entire school community including: central office personnel, parents, and community members.	0	0	0	0
52.	Data are organized and made available to provide easy access to staff members.	0	0	0	0
COMMENTS:					

Figure 4.1 Professional Learning Community Assessment—Revised (PLCA-R)

Source: Hipp, K. K., & Huffman, J. B. (Eds.) (2010). *Demystifying Professional Learning Communities: School Leadership at Its Best*. Lanham, MD: Rowman & Littlefield.

Build Reliance on Data References

- ◆ Bernhardt, Victoria. (2005). *Using Data to Improve Student Learning in High Schools*. Larchmont, NY: Eye on Education.
- ◆ Bernhardt, Victoria. (2007). *Translating Data into Information to Improve Teaching and Learning*. Larchmont, NY: Eye on Education.
- ◆ Conzemius, Anne & O’Neill, Jan. (2005). *The Power of SMART Goals: Using Goals to Improve Student Learning*. Bloomington, IN: Solution Tree.
- ◆ Hipp, K. K., & Huffman, J. B. (Eds.) (2010). *Demystifying Professional Learning Communities: School Leadership at Its Best*. Lanham, MD: Rowman & Littlefield.
- ◆ Kelley, Carolyn & Shaw, James. (2009). *Learning First! A School Leader’s Guide to Closing Achievement Gaps*. Thousand Oaks, CA: Corwin Press.

Develop Testable Hypotheses

Leadership team members should work with distributed instructional groups of staff to lead discussions of data to define a specific problem that the group wants to address. Once the problem has been clearly defined with data, the identification of a solution strategy should be straightforward. The team should draw on the expertise of teacher leaders, the experience of other departments, the principal, district curriculum coordinator, or other teaching and learning staff for intervention strategies that could effectively address the identified problem. Review of the research literature and site visits to schools in similar contexts that have had success in addressing similar problems also provide important and useful resources.

Based on input from these resources, the intervention should be clearly defined, and should provide a statement with regard to expected outcome goals to be achieved. This can be stated in terms of a *testable hypothesis*.

The team should draw on the expertise of teacher leaders, the experience of other departments, the principal, district curriculum coordinator, or other teaching and learning staff for intervention strategies.

Create a Testable Hypothesis

The testable hypothesis should take this form:

The Plan will produce these specific results by this specific time.

For example,

The implementation of our school-wide literacy instructional strategies will improve student performance in reading fluency for African American students on the state test by 10 percentage points in two years.

This type of specific hypothesis statement provides an opportunity to define a timeline for performance improvement and a specific focus for analysis of data to determine whether the intervention was successful.

Instructional leadership team members and other staff should identify promising practices through a variety of mechanisms.

Use Promising Practices to Address Common Problems

Instructional leadership team members and other staff should identify promising practices through a variety of mechanisms, including site visits to benchmark intervention strategies in similar schools/districts, review of research on how others have addressed the problem, and identification of experts in the school or district who have had success in addressing the problem in their classroom or school.

In developing the plan,

- ◆ Goals and objectives should be clearly specified, measurable, challenging and achievable in a specific time period.
- ◆ Evidence-based strategies should be aligned with the school vision and address the vision gap identified through data analysis in relation to the vision.
- ◆ Leadership responsibilities for implementation should be clearly spelled out, with opportunities to tap the talents of others identified, and a plan for allocation of resources to achieve the plan.
- ◆ A systematic assessment should be in place to document and evaluate implementation, baseline measures, and effectiveness as defined by the plan to close achievement gaps (Kelley & Shaw, p. 18).

Leverage Distributed Leadership to Shape, Implement, and Refine Promising Practices

The leadership team can be the source of initial vision setting, data analysis, and research of alternative strategies, but for the plan to move into classrooms throughout the school, the team will need to mobilize departments and teachers to engage the vision, analyze classroom-level data, and identify evidence-based intervention strategies.

Leadership team members should have training and opportunity to develop the learning community in these classroom-level teacher groups. Together with their classroom-level teams, they should establish goals and a timeline for addressing the learning problem.

An effective way to leverage distributed leadership is to build and hold team members accountable for advancing department, grade level, or school-wide action plans. There are many forms of action plans. The action planning form on page 65–66 was developed at the district level to record and monitor progress in achieving departmental action plan goals.

Another useful approach is to help leadership team members work with teachers to improve teaching practice by providing them with opportunities to practice the kinds of discussions they will have with teachers within the leadership team. The team can share ideas and plan together how they will work with teachers on targeted areas of instructional practice. By providing a framework or tools to guide discussion, the leadership team can bring forth a consistent message and focus to the entire school community. For example, the tools on pages 67–70 were developed by the National School Reform Faculty for use in Critical Friends groups (for more information, see www.nsrharmony.org). The Text Rendering Protocol (p. 67) can be used for discussion of text in Leadership Team Meetings or classrooms, and provides an effective approach to distilling text efficiently with broad participation of all members of the group. The Tuning Protocol (p. 68–69) defines a process for discussion of student work, and the Charrette Protocol (p. 70) defines a process for discussion of adult work, such as departmental action plans or processes. These protocols facilitate constructive feedback and can be used to guide discussions of instructional practice in leadership or teacher team meetings.

Similarly, the leadership team can develop a format for the development of departmental action plans that are aligned with school and district plans. By providing a consistent format and discussing in the leadership team the kinds of information departments should consider in building an action plan, the leadership team can build instructional leadership capacity of the team and guide distributed leadership discussions to ensure a consistent focus on teaching and learning throughout the school. An example of a departmental action plan tool developed in one of the partner schools is provided on page 71.

The leadership team can be the source of initial vision setting, data analysis, and research of alternative strategies, but for the plan to move into classrooms throughout the school, the team will need to mobilize departments and teachers to engage the vision, analyze classroom-level data, and identify evidence-based intervention strategies.

The Administrative Review of Final Exam tool on page 72 provides a mechanism for administrative review of the quality and consistency of final exams across the school to encourage attention to high quality assessment of student performance. The tool provides individual feedback to teachers that can be incorporated into an ongoing formative assessment process and instructional improvement process.

Annual Department/ Grade Level Learning Goal

School Name:	School Year:
Teacher Name:	
Department/ Grade Level Team Members:	
Curricular Area for School Learning Goal:	
Evidence of Need:	
Measurable Learning Goal(s) —Include the amount of improvement desired from baseline and the end-or-year student outcome measure.	
Action Plan (Steps to be taken, including training, parent involvement, instructional resources, community assistance, etc.). Check area(s) of focus in this action plan. <input type="checkbox"/> Assessment & Data (A) <input type="checkbox"/> Culture & Climate Institutional Practices (C) <input type="checkbox"/> Universal Classroom Instruction (U) <input type="checkbox"/> Professional Learning (P) <input type="checkbox"/> Interventions (I) <input type="checkbox"/> Resources (R)	

Text Rendering Experience Protocol

Developed in the field by educators affiliated with the National School Reform Faculty

Purpose

To collaboratively construct meaning, clarify, and expand our thinking about a text or document.

Roles

- ◆ A facilitator to guide the process.
- ◆ A scribe to track the phrases and words that are shared.

Set Up

Take a few moments to review the document and mark the sentence, the phrase, and the word that you think is particularly important for our work.

Steps

1. First Round: Each person shares a *sentence* from the document that he/she thinks/feels is particularly significant.
2. Second Round: Each person shares a *phrase* that he/she thinks/feels is particularly significant. The scribe records each phrase.
3. Third Round: Each person shares the *word* that he/she thinks/feels is particularly significant. The scribe records each word.
4. The group discusses what they heard and what it says about the document.
5. The group shares the words that emerged and any new insights about the document.
6. The group debriefs the text rendering process.

Protocols are most powerful and effective when used within an ongoing professional learning community such as a Critical Friends Group® and facilitated by a skilled coach. To learn more about professional learning communities and seminars for new or experienced coaches, please visit the National School Reform Faculty website at www.nsrffharmony.org.

Source: These and other protocols for use by leadership teams, classrooms, and other professional learning communities are available for download on the National School Reform Faculty website, at www.nsrffharmony.org.

Tuning Protocol

Developed by Joseph McDonald and David Allen

Purpose

To collaboratively review student work.

1. Introduction (5 minutes)

- ◆ Facilitator briefly introduces protocol goals, guidelines, and schedule.
- ◆ Participants briefly introduce themselves (if necessary).

2. Presentation (15 minutes)

The presenter has an opportunity to share the context for the student work:

- ◆ Information about the students and/or the class—what the students tend to be like, where they are in school, where they are in the year.
- ◆ Assignment or prompt that generated the student work.
- ◆ Student learning goals or standards that inform the work.
- ◆ Samples of student work—photocopies of work, video clips, etc.—with student names removed.
- ◆ Evaluation format—scoring rubric and/or assessment criteria, etc.
- ◆ Focusing question for feedback.
- ◆ Participants are silent; no questions are entertained at this time.

3. Clarifying Questions (5 minutes)

- ◆ Participants have an opportunity to ask “clarifying” questions in order to get information that may have been omitted in the presentation that they feel would help them to understand the context for the student work. Clarifying questions are matters of “fact.”
- ◆ The facilitator should be sure to limit the questions to those that are “clarifying,” judging which questions more properly belong in the warm/cool feedback section.

4. Examination of Student Work Samples (15 minutes)

- ◆ Participants look closely at the work, taking notes on where it seems to be in tune with the stated goals, and where there might be a problem. Participants focus particularly on the presenter’s focusing question.
- ◆ Presenter is silent; participants do this work silently.

5. Pause to Reflect on Warm and Cool Feedback (2–3 minutes)

- ◆ Participants take a couple of minutes to reflect on what they would like to contribute to the feedback session.
- ◆ Presenter is silent; participants do this work silently.

6. Warm and Cool Feedback (15 minutes)

- ◆ Participants share feedback with each other while the presenter is silent. The feedback generally begins with a few minutes of warm feedback, moves on to a few minutes of cool feedback (sometimes phrased in the form of reflective questions), and then moves back and forth between warm and cool feedback.
- ◆ Warm feedback may include comments about how the work presented seems to meet the desired goals; cool feedback may include possible “disconnects,” gaps, or problems. Often participants offer ideas or suggestions for strengthening the work presented.
- ◆ The facilitator may need to remind participants of the presenter’s focusing question, which should be posted for all to see.
- ◆ Presenter is silent and takes notes. Presenter may wish to pull back from the table or turn around to focus on listening to feedback and avoid the temptation to respond.

7. Reflection (5 minutes)

- ◆ Facilitator-led discussion of this tuning experience.

Protocols are most powerful and effective when used within an ongoing professional learning community such as a Critical Friends Group® and facilitated by a skilled coach. To learn more about professional learning communities and seminars for new or experienced coaches, please visit the National School Reform Faculty website at www.nsrffharmony.org.

Source: These and other protocols for use by leadership teams, departments, and other professional learning communities are available for download on the National School Reform Faculty website, at www.nsrffharmony.org.

The Charrette Protocol

Original written by Kathy Juarez, Piner High School, Santa Rosa, California.

Revised by Gene Thompson-Grove, January 2003,

National School Reform Faculty.

Revised by Kim Feicke, October, 2007, National School Reform Faculty.

Purpose

To collaboratively review and provide suggestions on adult work.

The following list of steps attempts to formalize the process for others interested in using it.

1. A team or an individual requests are charrette when:
 - a. The team/individual is experiencing difficulty with the work,
 - b. A stopping point has been reached, or
 - c. Additional minds (thinkers new to the work) could help move it forward.
2. A group, ranging in size from three to six people, is formed to look at the work. A moderator/facilitator is designated from the newly formed group. It is the moderator's job to observe the charrette, record information that is being created, ask questions along the way, and occasionally summarize the discussion.
3. The requesting team/individual presents its "work in progress" while the group listens (There are no strict time limits, but this usually takes five or ten minutes.) Sometimes, the invited group needs to ask two or three clarifying questions before moving on to Step 4.
4. The requesting team/individual states what it needs or wants from the charrette, thereby accepting responsibility for focusing the discussion. This focus is usually made in the form of a specific request, but it can be as generic as "How can we make this better?" or "What is our next step?"
5. The invited group then discusses while the requesting team/individual listens and takes notes. There are no hard and fast rules here. Occasionally (but not usually) the requesting team/individual joins in the discussion process. The emphasis is on improving the work, which now belongs to the entire group. The atmosphere is one of "we're in this together," and our single purpose is "to make a good thing even better."
6. When the requesting team/individual knows it has gotten what it needs from the invited group, they stop the process, briefly summarize what was gained, thank the participants and moderator and return to the "drawing board."
7. Debrief the process as a group.

Protocols are most powerful and effective when used within an ongoing professional learning community such as a Critical Friends Group® and facilitated by a skilled coach. To learn more about professional learning communities and seminars for new or experienced coaches, please visit the National School Reform Faculty website at www.nsrffharmony.org.

Source: These and other protocols for use by leadership teams, departments, and other professional learning communities are available for download on the National School Reform Faculty website, at www.nsrffharmony.org.

Sample Department Action Plan

Action Step	Priority	Critical Issue	Responsible Person	Time Frame	Visible Results	Resources Needed	Progress to Date
Example: Student Success Evaluate and identify key obstacles to student success in English. Focus on 9th and 10th grade data.	1	Student Success	Jim, Marie & Frank	Fall 2010	Matrix of Identified Obstacles and Variables	Test Scores, Grades, Student Profiles, Time	Data request from district, day away planned

Administrative Review of Final Exam

Quarter _____ Year _____

Administrator _____ Date _____

Department _____ Course _____

Staff Responsible _____

For each assessment, rate the following sections 1 to 5 according to the following key:

1 = Not at all 2 = Rarely 3 = Sometimes 4 = Frequently 5 = Extensively

1. Readability

1—5	
	A. Questions are typed with appropriate font.
	B. Clear directions are given for each type of question.
	C. Multiple-choice answers are typed vertically: a. b. c.
	D. No more than 10 matching choices are given per section.
	E. Enough white space is given to read questions.

2. Organization

1—5	
	A. Questions are organized by topic or theme.
	B. Directions are easy to read and understand.
	C. Directions are printed in bold or italic or standout from the rest of the assessment.
	D. Students are given enough space to complete and answer the question.

3. Content

1—5	
	A. Questions require students to apply thinking skills and processes rather than merely the recall of factual information. Simple recall questions make up no more than 20% of the exam.
	B. Exam includes a variety of components of literacy (reading, writing, speaking, listening).
	C. Performance on learning targets, content standards and most essential benchmarks is being tested.
	D. There is emphasis on meaningful context based on real life problems, situations, and student interest.

4. Critical Thinking / Problem Solving

1—5	
	A. Students are expected to do two or more of the following: <ul style="list-style-type: none">◆ Compare or contrast information◆ Classify◆ Use inductive reasoning◆ Use deductive reasoning◆ Analyze perspectives◆ Apply learning

5. Variety of Question Formats

1—5	
	A. A variety of question formats (<i>multiple choice, short answer, true/false, essay &/or constructed response</i>) are included on the exam, and the exam includes at least one map or graph for students to interpret.

Approved

Yes _____ No _____

Notes or Additional Feedback:

The school context or developmental stage needs to be assessed and addressed as needed.

Contextualize to Reflect School Developmental Stage

The leadership challenge varies by school context. While this toolkit provides general guidelines for timelines for building distributed instructional leadership, depending on the school's specific context and developmental stage, leaders may need to establish foundational relationships within the school community, create a safe and secure learning environment, build employee morale or take other action steps in addition to those described here. Thus, the school context or developmental stage needs to be assessed and addressed as needed in addition to the action steps defined throughout the toolkit. Key questions that can help to frame the selection, focus, and pace of the development of the distributed instructional leadership team include:

- ◆ Is there a new principal?
- ◆ What is the history of teacher leadership in the school?
- ◆ What are the critical priorities of the school?
- ◆ Is there a shared vision?
- ◆ What culture/environment exists in the school? Is there a need to focus first on relational trust and safety concerns before turning to teaching and learning?
- ◆ What are the norms of teacher collaboration, and how do they vary across the school?
- ◆ How do we reward/acknowledge/celebrate accomplishments?
- ◆ What resources are available, such as for professional collaboration time? How can resources be reprioritized to support the development of distributed leadership for learning?
- ◆ What is the history of the school—points of pride, changing demographics/achievement, etc.?

These factors can affect the pace of change, the focus and level of investment needed in team building, and the timing and the direction of the work to improve the climate for teaching and learning in the school.

5

Distributed Instructional Leadership Action Step:

Align Leadership Structures and Roles to Support Improvement Efforts

School Structures and Roles

Investing in an initial focal leadership team provides an opportunity to focus leadership effort and investment in building the instructional leadership capacity of this group. As the focal leadership team begins to generate energy, enthusiasm, and direction for the school's improvement efforts, the principal needs to bring along other critical leadership structures in the school so that the entire school is working together to improve student learning outcomes.

Key leadership structures that need to be developed include the administrative team, the department chair leadership team, and any other critical leadership group in the school, such as a school improvement or curriculum planning team. Alignment between structures should include:

- ◆ Cross-participation and communication across leadership teams.
- ◆ Building a school-wide shared vision and a vision for the work of each team.
- ◆ Role refinement or redefinition to highlight instructional leadership role focus across teams.
- ◆ Common training in instructional leadership, group facilitation, data analysis, and conflict resolution.
- ◆ Alignment of supervisory expectations and supports for instructional leadership roles and student learning goals.

In turn, the principal and leadership team members build distributed instructional leadership by extending opportunities to teacher teams throughout the school. These activities can begin with vision-setting for the teacher team, analysis of data, and development and implementation of action plans consistent with school-wide vision and action planning. Leaders of teams can follow a process similar to the one they experienced to develop department, grade level, subject matter, or other teams of teachers and instructional support staff.

School level leaders need to maintain open communication between district staff and teacher leaders to share concerns and expertise.

School Structures and Roles References

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District Structures and Roles

Alignment with district roles and structures is also critical, and school and district leaders should work together to build a consistent vision and direction for school improvement. A key barrier to the development of instructional leadership at the school or teacher level is the perception that the district does not support bottom up leadership and reform. Due to the size of high schools, and the lack of regular communication between the district staff and individual teachers, it is easy for teachers to misunderstand or misinterpret district action. School level leaders need to maintain open communication between district staff and teacher leaders to share concerns and expertise, and address alignment issues before they become problems. School teams need to build trust and obtain assurance from the district that the efforts they engage in are not going to conflict with new district initiatives. Clear communication about the role of the district and the school in curriculum and programming is critical to support the sometimes fragile act of faith needed for teachers to "stick their necks out" and exercise instructional leadership among their peers.

Distributed leadership enables school leaders to reach a much larger segment of school staff directly and efficiently. The challenge for district leaders is to ensure that district staff works to reach out to distributed leaders, either directly or through school leaders, to convey a clear and consistent message about the district's vision and plan of action. District leaders need to build, communicate, and follow a clear theory of action in order to provide distributed leaders an opportunity to address important student learning issues at the school level in ways that are consistent with district directions. Thus, clear communication at the district level to build a meaningful, shared vision for the role of the district is a critical first step to empowering high schools to successfully pursue a distributed instructional leadership strategy.

District personnel are an important asset to the distributed instructional leadership initiative because they have knowledge, information, and resources that are invaluable to advancing school improvement efforts. Building trust, clearly defining district and school roles, and brokering agreements are activities that need to be revisited on an ongoing basis as the distributed instructional leadership process unfolds. Where a positive relationship is built between district and school staffs, having a district presence to answer questions, problem solve, and provide data and resources to the leadership teams strengthens district/school relationships and understandings. In this way, the active participation of district personnel is essential to empower teachers and schools to lead school improvement efforts.

District Structures and Roles References

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Appendix A

Research Rationale for Distributed Instructional Leadership

The traditional definition of *instructional leadership* consists of principal behaviors that set high expectations and clear goals for student and teacher performance, monitor and provide feedback regarding the technical core (teaching and learning) of schools, provide and promote professional growth for all staff members, and help create and maintain a school climate with focus on high academic achievement (Edmonds, 1979; Bossert, Dwyer, Rowan & Lee, 1982; Hallinger & Murphy, 1985; Murphy, 1990; Weber, 1997; Blase & Blase, 1999).

Instructional leadership is defined as “those actions that a principal takes, or delegates to others, to promote growth in student learning.” In practice, this means that the principal encourages educational achievement by making instructional quality the top priority of the school and brings this vision to realization (Hoy & Hoy, 2003). The role of an instructional leader differs from that of traditional school administrator in a number of meaningful ways. Whereas a conventional principal spends the majority of his/her time dealing with strictly administrative duties, a principal who is an instructional leader is charged with redefining his/her role to become the primary learner in a community striving for excellence in education. As such, traditionally it becomes the principal’s responsibility to work with teachers to define educational objectives and set school-wide or district wide goals, provide the necessary resources for learning, and create new learning opportunities for students and staff.

Distributed Leadership for Instructional Excellence

Spillane, Diamond and Jita (2001) point to some of the challenges of traditional over-emphasis on single person leadership, preferring distributed leadership in schools especially in regard to instructional excellence. “Leadership literature has contributed to the belief that the principal is a synonym for school leadership” (p. 3). They are skeptical of leadership trait and cognitive theories that have emphasized leadership chiefly as a function of individual personality, ability, traits, and style. This in their view has created, “a problematic omission because other professionals can also play important roles in leading instruction” (p. 4).

Spillane, Diamond and Jita (2001) have responded to this problematic understanding of school leadership owing to the narrowly focused traditional research literature, leadership theories and practice by presenting their model of *distributed leadership*. These authors argue that in order to understand school leadership it is necessary to understand both the practice of leadership of all those who lead in schools (teachers, assistant principals, department

heads and the principal) and also the relationships among those leading practices.

The distributed leadership perspective highlights the need for understanding school leadership as a distributed practice that is stretched over the “school’s social and situational contexts” and not to be understood as a function of one individual leader whether it is the principal, assistant principal or teacher (Spillane, Halverson & Diamond, 2001).

Appendix B:

Department Chairs as Instructional Leaders: A Research Summary

While there is a large and growing body of research on teacher leadership, and on professional learning communities as important elements of effective school reform, amazingly little has been written on the department chair's role. Those who have written about the department chair have noted the ambiguity inherent in the role, the focus on management rather than leadership functions, and the tension between chair roles of leader versus teacher. Typically, department chairs manage resources (order supplies, schedule facilities, and provide input into building the master schedule), facilitate communication between administration and teaching staff, and serve as a teacher representative in school-wide discussions. Department chairs also play important *pastoral* roles, providing comfort and support for teachers struggling through everyday challenges, and in holding the department together as a team or unit (Weller, 2001).

With a strong connection to both school-wide policy and vision, and to the realities of the daily life of teachers, the department, the classroom, and students, department chairs are in a position to play an important role in advancing instructional effectiveness. So much so, that one researcher calls the department chair “the most underutilized leadership position” (Weller, 2001).

High school reform in the U.S. has focused on addressing structural challenges of the large comprehensive urban high school. These efforts have focused on making structural changes to personalize the learning environment and improve access to higher level courses for all students. In addition to these changes, some high school reformers have focused on repurposing existing school structures to strengthen the focus on teaching and learning. One of these structural reforms involves making better use of the department chair as an instructional leader.

For example, the National College for Leadership of Schools and Children's Services (The National College), England's national professional development and school improvement college, has developed a strand of leadership training focused specifically on middle-level leaders, or department chairs. Research on English high schools with challenging populations of students that have succeeded in advancing learning for all students, shows that these middle-level leaders play a key role in advancing the quality of instruction in effective high schools (Emmerson et al., 2006; Francis, 2007; Hobbes, 2006; Jones, 2006).

The National College has published a series of research reports, and dedicated a website to sharing the information on the important role of middle level leaders in moving schools forward (http://forms.ncsl.org.uk/mediastore/image2/madtest/public_html/index.html). This research shows that effective middle level leaders set an example for their colleagues and pupils alike by modeling:

- ◆ A Focus on Learning
- ◆ Consistency
- ◆ Care
- ◆ Commitment
- ◆ High Expectations

Further, middle level leaders used a variety of strategies to advance quality instruction and focus their departments on student learning. These included modeling, monitoring, dialogue, structures and symptoms, retention of staff, professional development and culture (Emerson, Paterson, Southworth, and West-Burnham, 2006).

Research on the instructional leadership role of the department chair in the U.S. has focused more narrowly on chairs within specific disciplines. For example, department chairs have been shown to play a key role in facilitating rigorous discussions in social studies departments (King, 1991), and in supporting the development of effective communities of practice in math and science departments (Printy, 2008). As a leader of the community of practice, the department chair is:

- ◆ an agenda setter, communicating policy messages to teachers and subtly or explicitly establishing expectations for teacher's work.
- ◆ a knowledge broker, focusing teacher attention on instruction, creating conditions for productive teacher conversations, scaffolding teacher learning, and facilitating translation and alignment of meanings across communities.
- ◆ a learning motivator, nurturing positive relationships, establishing urgency for new approaches and holding teachers accountable for results (Printy, 2008).

Printy's (2008) quantitative study of a national sample of principals, department chairs, teachers and schools found that the leadership of the department chair is *the most important factor* in predicting teacher participation in communities of practice. Further, the principal's ability to advance a clear vision for the school helped to break down barriers between departments, and supported department chairs in advancing a school-wide vision of learning for students.

The department chair's role as a subject matter expert also provides an important complement to the principal's role as instructional leader. Nelson et al. (2007) refer to the knowledge base combining leadership skills and content knowledge ("leadership content knowledge") to define the features of leadership that enable school leaders to monitor and support specialized content-based pedagogy. Because department chairs are content experts, they play an important role informing and focusing content-specific instructional leadership.

Effective High Schools

Research on effective high schools suggests that schools that have closed achievement gaps and advanced learning for all students have a strong shared vision focused on learning, use data to define gaps between the vision and the current reality, draw on evidence-based plans, collect and analyze data to understand how well interventions have addressed the specified goals, and routinely reflect to refine the vision and interventions. The entire school community shares a laser-like pursuit of the vision, understands where the school is in relation to the vision, and generally understands what the school is doing to move that vision forward. These schools focus on advancing learning for all students, and they pursue focused efforts to build teaching capacity, acquire and align resources to the vision, and engage the community in partnerships to advance learning. Common practices include individualized and supplemental instruction to address student learning needs, an unwillingness to accept failure, high expectations for all students, and scheduling practices that prioritize student learning needs, among others (Kelley & Shaw, 2009).

Department Chair as a Leader in the Departmental Learning Community

Richard DuFour defines professional learning communities as "collaborative teams whose members work *interdependently* to achieve *common goals* linked to the purpose of learning for all. The team is the engine that drives the PLC effort and the fundamental building block of the organization" (DuFour et al., 2006). Wenger writes about a similar concept, *communities of practice*, that emerge as professionals come together to address problems of practice. Wenger's research suggests that communities of practice can be highly motivating, as they promote *learning*, as teams work together to solve common problems. Participation in a community of practice around an important problem also creates *meaning* in the work, and ultimately shapes *identity*, as the way individuals think about themselves and their work changes through participation in the community.

The department chair can play an important role in fostering and building communities of practice, by helping to structure interactions around common problems of practice, by inviting individuals to be a part of the community, and by documenting the work of the community.

In summary, our review of the research suggests five elements to a clarified role for department chairs as instructional leaders. Instructional leaders are educators who work to create coherent, purposeful, and sustainable learning environments for all students and staff. Instructional leaders at the department level provide a critical link between school administration and teachers, as they understand and participate in school-wide decisions and are also a member and participant in the work of the department. These leaders strengthen teaching and learning by:

- ◆ Facilitating the development of shared vision at school and department levels.
- ◆ Using data to identify goals and assess instructional effectiveness.
- ◆ Supporting student and adult learning.
- ◆ Monitoring progress in alignment of curriculum, instruction and assessment.
- ◆ Promoting continuous improvement in teaching and learning at the school and department levels.

In doing so, department chairs serve a critical role in advancing student learning in the comprehensive urban high school.

Department Chairs as Instructional Leaders

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