



5H – “Building Coaching Through Intentional Capacity Building”

Presenters:

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- **Topic:** Coaching
- **Keywords:** Systems Alignment





BUILDING COACHING THROUGH INTENTIONAL CAPACITY BUILDING

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OBJECTIVES

- 01** Find clarity on what the role of coaching looks like in respective contexts
- 02** Identify transactional, transformational, and educational coaching skills relevant to respective contexts
- 03** Explore ways to build consistency among coaches supporting change in respective contexts



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National PBIS Leadership Forum





DEFINITIONS

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COACHING DEFINITION

Each country, state, or district may have their own definition of coaching. However, all of these definitions are rooted in the same idea that coaching is the “conversational activity that aims to support people to learn and develop.”





NIRN COACHING PHILOSOPHY

The process by which trained skills or practices are brought under stimulus control in natural settings. Coaching shapes use of a learned skill and guides improved precision, fluency, and contextual adaptation while maintaining integrity to the practice.





VIRGINIA COACHING DEFINITION

Providing “dynamic support and facilitation to develop the capacity of school or district teams to implement [a multi-tiered system of support]”

(March and Gaunt 2013, p. 4)

Through ongoing relationships and facilitating a cyclical process, systems coaching develops the capacity of division and school leadership teams to implement and align MTSS with their mission and goals (*outlined in strategic plans, continuous improvement plans, OSQ plans/MOUs, SEPI CAPs*) in order to enhance student outcomes.

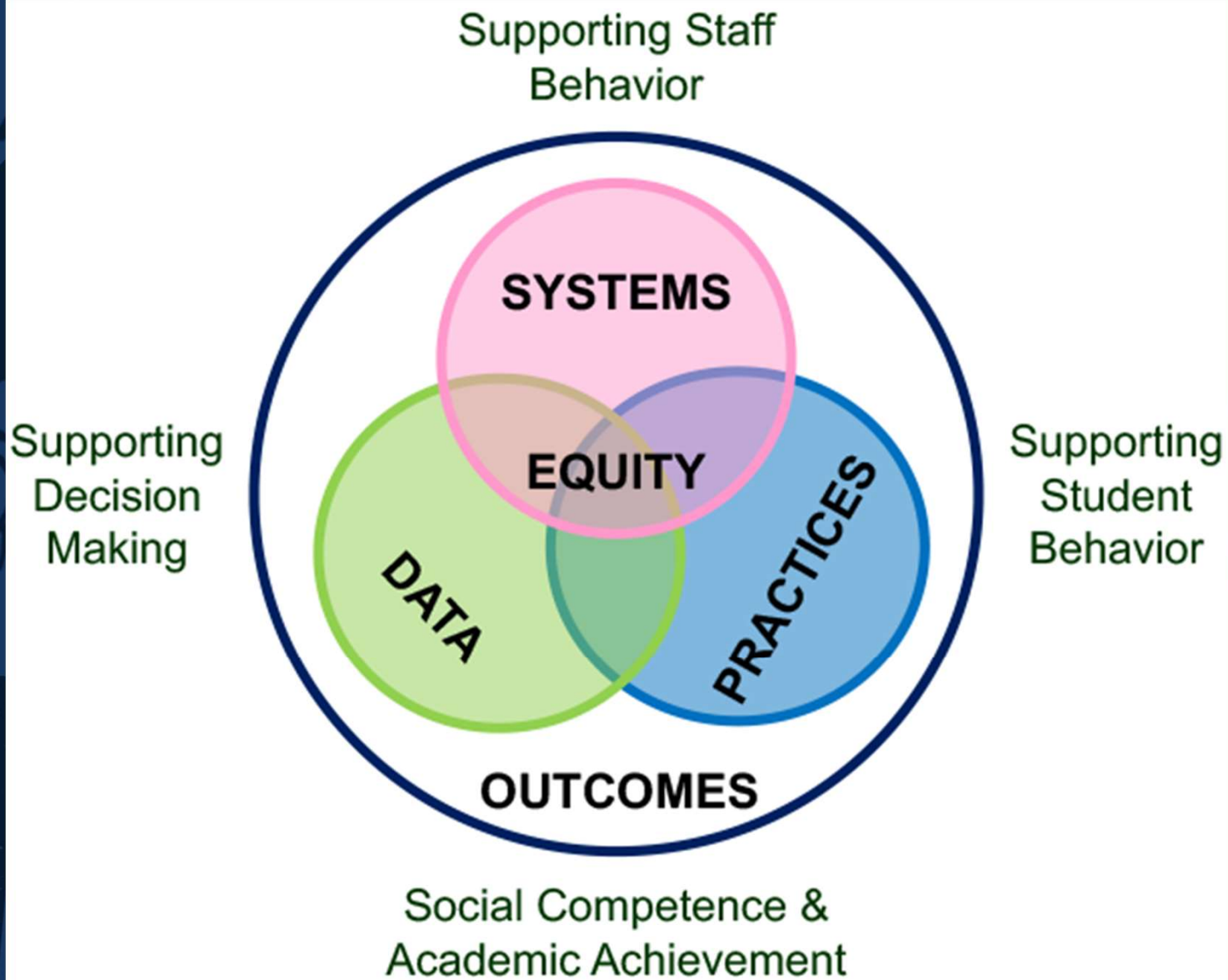




MICHIGAN COACHING DEFINITION

A coach supports the growth and professional learning of an organization and its stakeholders. A coach models and facilitates best practices to achieve desired outcomes while providing feedback. A coach possesses specialized knowledge and skills that builds capacity of an organization. A coach develops rapport while objectively analyzing systems, infrastructure, and individuals who sustain continuous improvement.







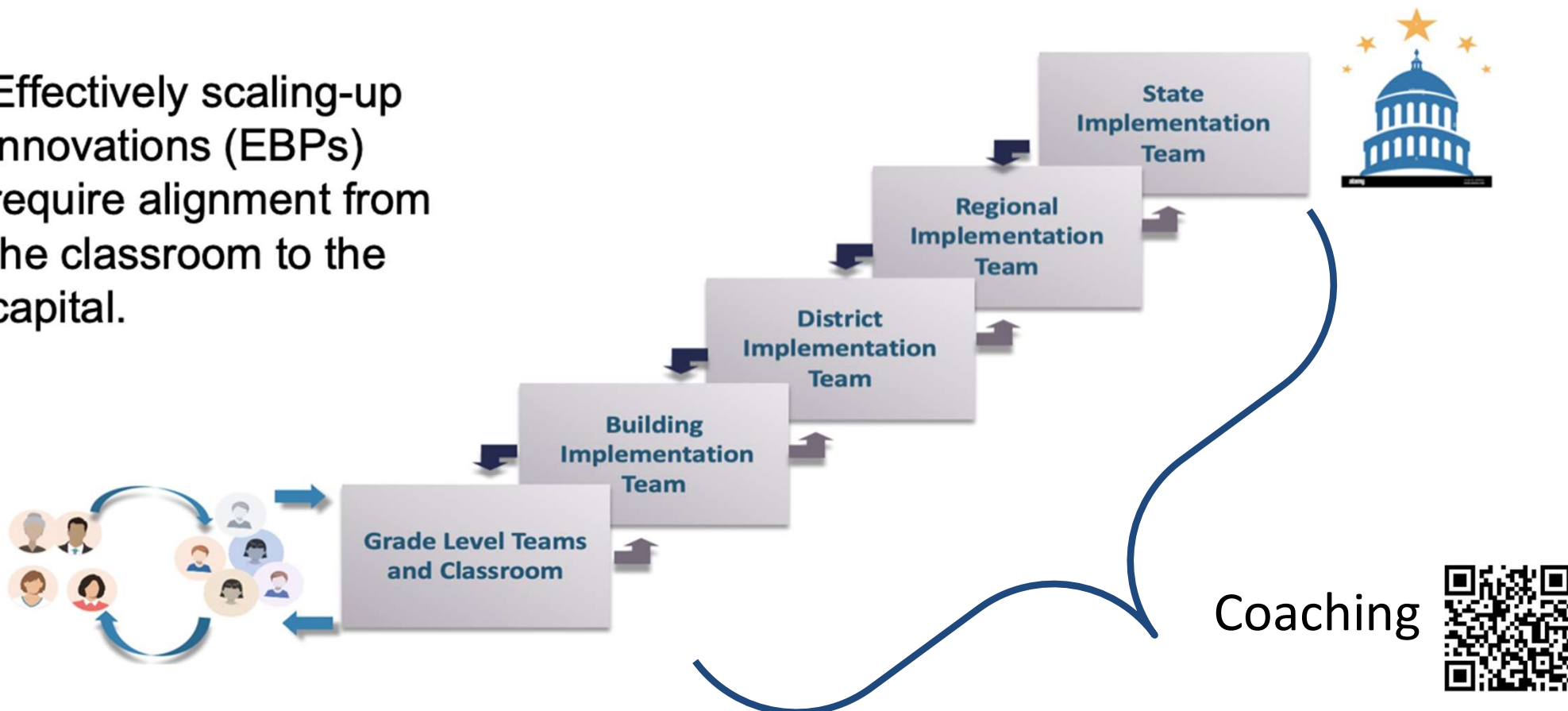
Levels of COACHING

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Implementation Teams Across the Educational Cascade

Effectively scaling-up innovations (EBPs) require alignment from the classroom to the capital.



SYSTEMS & PRACTITIONER LEVELS

Systems Level

Coaching to develop the capacity to effectively use or support the use of an effective innovation (e.g., program, practice, framework) to enhance student outcomes

Primary coaching recipient:
implementation teams (e.g., District, School)

Example: Supporting the school leadership team in the development and use of PBIS, ISF, MTSS


Practitioner Level

“Content/practice-level coaching” to help teachers improve instruction in an area using a particular strategy, practice, or program to improve student outcomes

Primary coaching recipients:
individual staff or students (e.g., teachers, direct service providers)

Example: Supporting teachers in use of a social-emotional-behavioral intervention program





COACHING CHANGE in EDUCATIONAL CONTEXT

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TRANSACTIONAL/ TECHNICAL CHANGE

Transactional coaching is focused on actions. It's about performance.

- Change or adaptations to practices, instruction, or learning new strategies
- Changes in team operating procedures & data informed decision making
- Important, but may not reflect deeper change





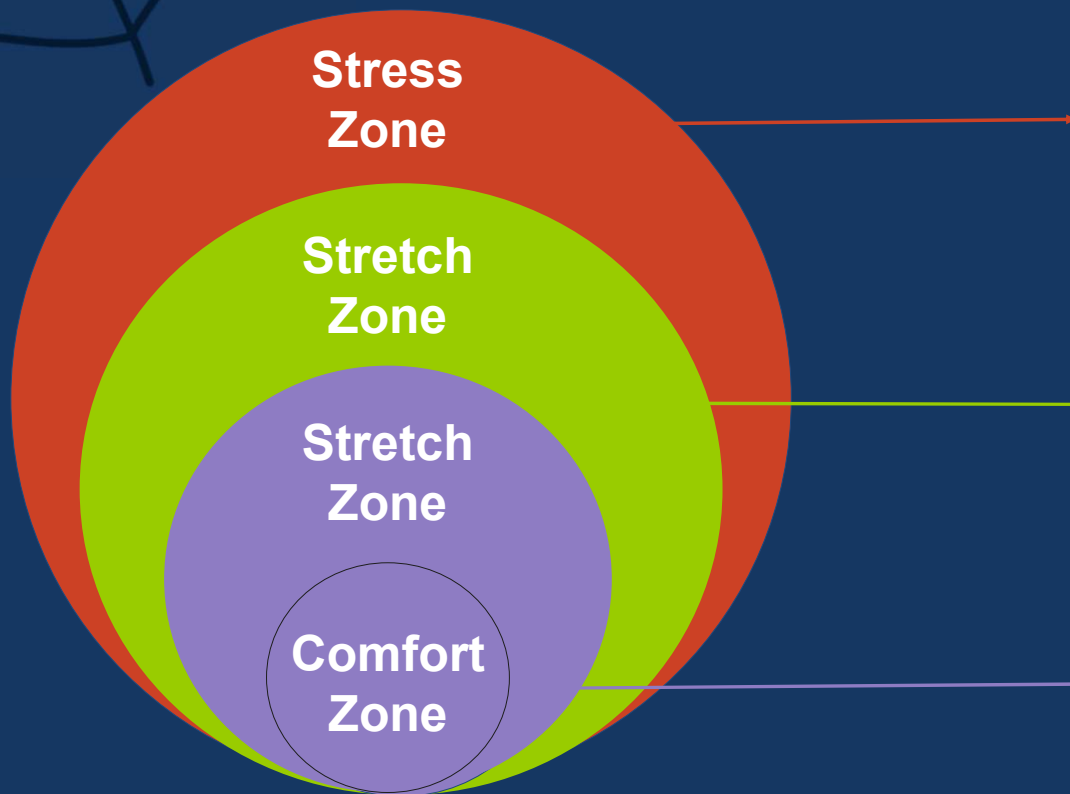
TRANSFORMATIONAL/ ADAPTIVE CHANGE

Changes in Values, Beliefs, Roles, Relationships, Bias, & Approaches

Adaptive change...More likely to occur after technical change as a result of experiencing successes and seeing the potential for equitable outcomes through the use of effective strategies (Guskey, 1986)



ALTERING YOUR STATUS QUO



Stress/Panic - you are more likely to shut down than learn or grow

Stretching - you have an opportunity to learn and grow!

Comfortable - little opportunity to grow or learn. Your status quo.





TURN & TALK

With those sitting around you (groups of 2, 3, or 4), discuss examples of technical and adaptive challenges you have experienced in your work as an educator.

- What was the challenge?
- How did (could) coaching support effective technical or adaptive change?

Technical vs. Adaptive Challenges

TECHNICAL	ADAPTIVE
Root causes are easy to identify	Root causes are difficult to identify and easy to deny
Often lend themselves to cut and dried solutions	Requires changes in beliefs, values, roles, relationships, and approaches to work
Often can be solved by an authority or expert	People most impacted by the problem need to do the work of solving it
Requires change in just one or a few places; often contained within organizational boundaries	Requires change in numerous places; usually across organizational boundaries
People are generally receptive to the technical solution	People often resist even acknowledging adaptive challenges
Solutions can be implemented quickly, even by edict	"Solutions" require experiments and new discoveries; they can take a long time to implement and can't be implemented by edict

Adapted from Accelerating Organizational Anti-Racism Work with Adaptive Leadership and Mindful Communication Practices by Gilvar Consulting

FUTURE READING...

Trends in Medicine



Adaptive Leadership: Making Progress on Intractable Challenges

November 18, 2021



The last two years have required making sudden adjustments in response to COVID-19, social issues and tensions. To move forward on these complex challenges demands new stretches in our capacity and invites us to grow at the frontier of our competence. For that, we need new tools, frameworks and solutions explains Rosi Greenberg, speaking to a workshop at the [Surgical Leadership Program](#). Greenberg teaches on leadership and executive education topics at Harvard University and at the organizations KCONI and Drawn to Lead.

What is Leadership?

It is accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty, according to Greenberg's mentor, Marshall Ganz, a lecturer at the Harvard Kennedy School.

"The face of uncertainty is key. That is why we need this type of leadership today," Greenberg said. Leadership has changed over the past many years from a technical process to something much more adaptive involving figuring out how to help people deal with uncertainty. Greenberg believes that seeing "uncertainty" in the definition of leadership is a positive because one does not have to have the answers. "In fact, as the leader in an adaptive situation, you can't solve it yourself. You need to help your group make progress—that is all you can do, and that is a success."

Addressing Varying Types of Challenges

"We thrive by addressing the problems that arise in the life of our groups, whether it's an organization, community, patient or institution," says Greenberg. "But we need to think carefully about the nature of the challenge we are facing."

In his seminal work on adaptive leadership, Ron Heifetz of the Harvard Kennedy School distinguishes between adaptive and technical challenges, which Greenberg shared. Distinct types of challenges need different approaches.

Technical Challenges:

Key Quotes

- "One of the biggest leadership mistakes is treating an adaptive challenge as a technical one."
- "...people do not resist change. Instead, they resist loss which can come in many forms..."
- "Start imagining the fears, what is at stake for people..."
- "...narrate and anchor people on what is staying the same (continuity) and what needs to change."

<https://postgraduateeducation.hms.harvard.edu/trends-medicine/adaptive-leadership-making-progress-intractable-challenges>





LeADeRSHIP & CHAnGe

“The changes required will be not only in out organizations but in ourselves as well.

...Only by changing how we think, can we change policies and practices.

...Only by changing how we interact can shared vision, shared understandings and new capacities for coordinated action be established.”

Senge, P. M. (1990) The Fifth Discipline



BOTH LEAD TO A CHANGE IN STUDENT OUTCOMES



(Leverson, Smith, Rose, McIntosh, Rose, & Pinkelman, 2021)





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**65/132
LEAS**

**618/2,015
SCHOOLS**

VIRGINIA

**711,466 OF
1,296,817
SCHOOLS**

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GOALS

Improve
Division
Systems &
Build Local
Capacity

Improve PreK-
12 classroom
& school
Systems &
Practices

Improve
Student
Outcomes



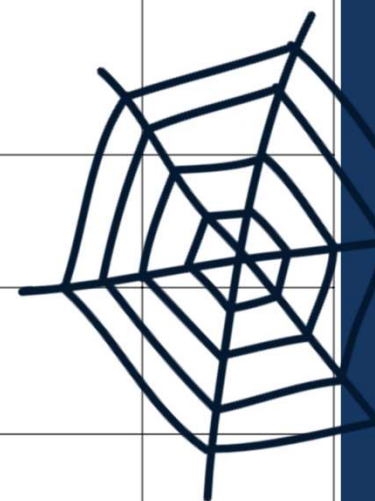
As Coaches, we embody trust, equity, sustainability, and skillfulness

	Coa		Overall (O)	Coaching (C)	Training (T)
Overall	• • • • •	Responsible	<ol style="list-style-type: none"> Attend meetings and coach trainings Self-monitor tasks and completion Engage in intentional dissemination 	<ol style="list-style-type: none"> Attend site-team meetings (data-driven) Collect relevant artifacts from teams Facilitate the establishment of data collection systems Consultation notes completed 	<ol style="list-style-type: none"> Ask for clarification or assistance for concepts/topics with which you are not yet fluent Schedule & present targeted trainings
Implementation Support	• • •	Data- Driven	<ol style="list-style-type: none"> Facilitate and use communication loops to ensure reports and data are delivered to the SEA, LEA, and school sites in a timely manner Use data to allocate time and resources 	<ol style="list-style-type: none"> Use TFI/companion guides to collect data and drive action planning Use various data sources for assessment, planning, and reporting Promote the use of a problem-solving process utilizing data 	<ol style="list-style-type: none"> Collect evaluations on all formal presentations Review & reflect on feedback (e.g., from participants, SEA coach, LEA administrators)
Coaching	• •	Professional	<ol style="list-style-type: none"> Assist LEA and schools to build capacity for sustained implementation (<i>redefine your role over time</i>) Read professional literature/MTSS content and/or attend webinars or training events at a minimum of 30 min/week Engage in professional and ethical standards (see Coaches Code) 	<ol style="list-style-type: none"> Demonstrates a range of coaching strategies and approaches Build credibility & rapport Demonstrates social-emotional skills to cultivate and preserve a coaching context Consistently promotes and applies a mindset of coaching for change to positively impact change design and outcomes for all served by structures, systems, and supports 	<ol style="list-style-type: none"> Engage in effective training techniques (e.g., adult learning, high-quality PD, etc.) while presenting Bonus: Present on MTSS/PBIS at SEA, LEA, and national forums
Professional Growth & Application	• • •				



As Coaches we embody trust, equity, sustainability, and skillfulness

Overall	Coach Expectations	Associated Values	Evidence / Examples	Red	Yellow	Green	Rating	Professional Growth Plan	Notes
	1 Communicates effectively in multiple contexts with multiple stakeholders	Trust: consistent follow through, appropriate level of confidentiality Equity: promotes equity of voice Sustainability: models adherence to designated communication loops/protocols to establish long-term processes and procedures (e. g., documentation) Skillfulness: uses skills that facilitate communication bi-directly with all types of stakeholders, colleagues, etc.	- Facilitate a process to support communication loops with partners and LEA stakeholders - Planning meeting notes - Agenda minutes, meeting reflection notes - E-mail correspondence (return emails/calls within 2 days)	Communication is not clear, timely OR Stakeholders communicate or demonstrate ineffectiveness and request further data clarification	Communication is clear and timely HOWEVER Stakeholders communicate or demonstrate ineffectiveness OR request further data clarification	Communication is clear, timely and stakeholders report that it is effective AND There are minimal misinterpretations and questions re: need for clarity			
	2 Uses data to allocate time and resources	Trust: reliably attends meetings Equity: allocates time based on data indicated need Sustainability: adjusts coaching/fading as indicated by data Skillfulness: organizational skills, time management	- Attend Implementation, PLC, workgroup/team, and project meetings - Professional Calendar - Agenda (DLT, SLT) - Pre-meeting notes - Post-reflection meeting notes	Evidenced less than 2 weeks (50%) of time across targeted expectations	Evidenced 2/4 weeks (50%) of time across targeted expectations	Evidenced at least 3/4 weeks (75% or greater) and activities are distributed across the matrix			
	3 Self-monitors tasks assigned and completion	Trust: follows through on commitments; dependable Skillfulness: organizational skills, time management	- Completed Blue Sheets/Event Log bi-weekly - Respond to weekly prompt & reflection log - Reports and data are delivered to the state on or before due date (Mid-year data collection; TFI scores; End of year data collection) - University Team Division updates	Less than 50% of targeted tasks are completed AND (when applicable) Data for less than 80% of teams submitted on time	50-79% of targeted tasks are completed AND (when applicable) Data for all teams submitted late (within 1 week)	80%(+)of targeted tasks are completed AND (when applicable) Data for all teams submitted on time in relevant months			
	4 Engages in professional and ethical standards	Trust: acts with integrity to positively reflect self, VTSS, & VDOE Skillfulness: engages in a process of reflection that promotes growth (see Coaches' Code)	- Engage in professional and ethical standards, i.e. Coaches' Code - Seek assistance / enhance knowledge and build fluency - Seek and apply feedback for self-improvement	Unable to provide an example of adherence to the ethical standards or NIRN Practice Profile, or had a violation of ethical standards	Provides 1 example of adherence to the ethical standards or NIRN Practice Profile	Provides 2 examples of instances of adherence to the ethical standards or where the NIRN Practice Profile was used in coaching, training, or presentations			
	5 Demonstrates Social Emotional Skills to cultivate and preserve a coaching context	Trust: demonstrates social awareness to promote respect, and acts in ways that convey a sense of safety to those we partner with. Equity: displays the SEL competencies (Social awareness, self awareness, and Relationship skills) to notice and affirm the various individual and group identities and cultural dynamics present to support the creation of inclusive, enabling work environments Skillfulness: actively monitors and applies skills to promote emotional intelligence	- Regulate and monitor emotional state and how that could impact others - Create and cultivate an enabling context within coaching partnerships and colleagues - Expect, attend to and mitigate resistance to change - Engages in practices or routines to support stress management and transitions to and from work environment	Unable to provide an example for this month	Provides at least 1 example for this month	Provides at least 2 examples for this month			



COACHES CODE



1.0 CONDUCT

Coaches uphold high standards of professional behavior at all times.

- **1.01 Reliance on Scientific Knowledge**
Coaches rely on scientific research when making professional judgments and when performing professional duties.
- **1.02 Competence**
 - a) Coaches provide services within the boundaries of their competence, based on their education, training, and professional experience.
 - b) Coaches undertake ongoing efforts to develop and maintain competence within the areas of MTSS implementation and related practices (PBIS, RTI, SEL, etc.)
- **1.03 Professional Development**
Coaches regularly read current research and publications on MTSS, related practices, other project-specific work, and attend conferences and workshops if applicable, to maintain competency in their field.
- **1.04 Integrity**
 - a) Coaches are truthful and honest. They follow through with professional obligations and commitments that produce high-quality work. Coaches will only make commitments that she/he may reasonably keep.
 - b) Coaches act and work in a lawful and moral way.
 - c) Coaches are aware of and respect cultural, individual, and community diversity within schools.

2.0 RESPONSIBILITY TO THE CLIENT

The coach maintains the best interest of clients.

- **2.01 Definition of Client**
The term "client" refers to whomever the coach provides services, whether an individual student or staff member at a school or entity such as a school or district.
- **2.02 Accepting Consultations**
Coaches acknowledge and respond to requests for assistance from schools and divisions in an appropriate and supportive manner as defined within the roles/responsibilities of a systems coaches work and within a timely fashion.
- **2.03 Responsibility**
The coach's responsibility is to all parties involved.
- **2.04 Consultations**
When necessary, the coach will cooperate and collaborate with other professionals to provide the most appropriate and effective service to their clients.
- **2.05 Maintaining Confidentiality**

Adapted from Nevada PBIS Technical Assistance Center: Coaches Code

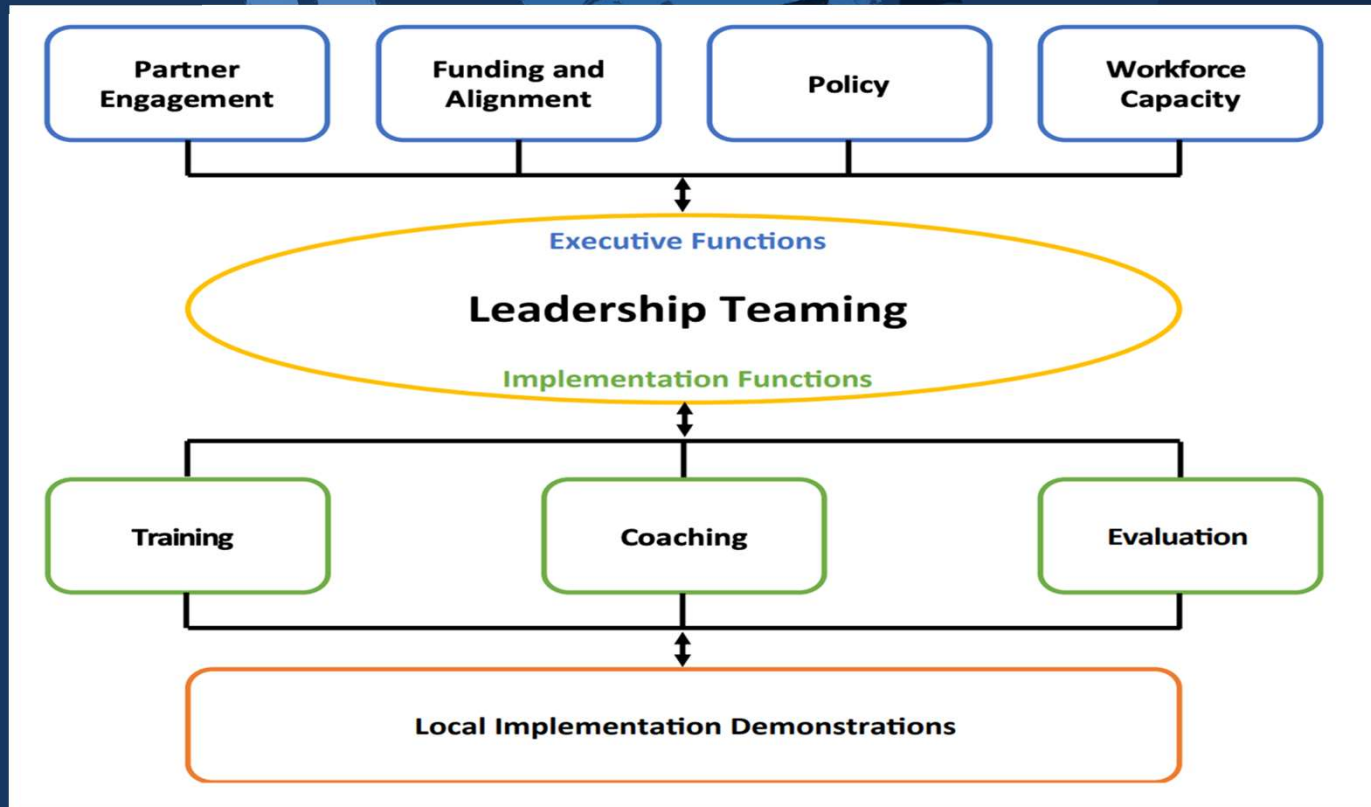


TRANSACTIONAL TO TRANSFORMATIONAL

Coach for sustainability -
redefine your role over time

Engage in ongoing
Professional learning

Self-monitor
tasks,
organizational
skills, & time
management



Develop
feedback
processes for
reflection

Communicate
effectively
across contexts

Promote
psychological
flexibility

Use data to
allocate time &
resources



MICHIGAN



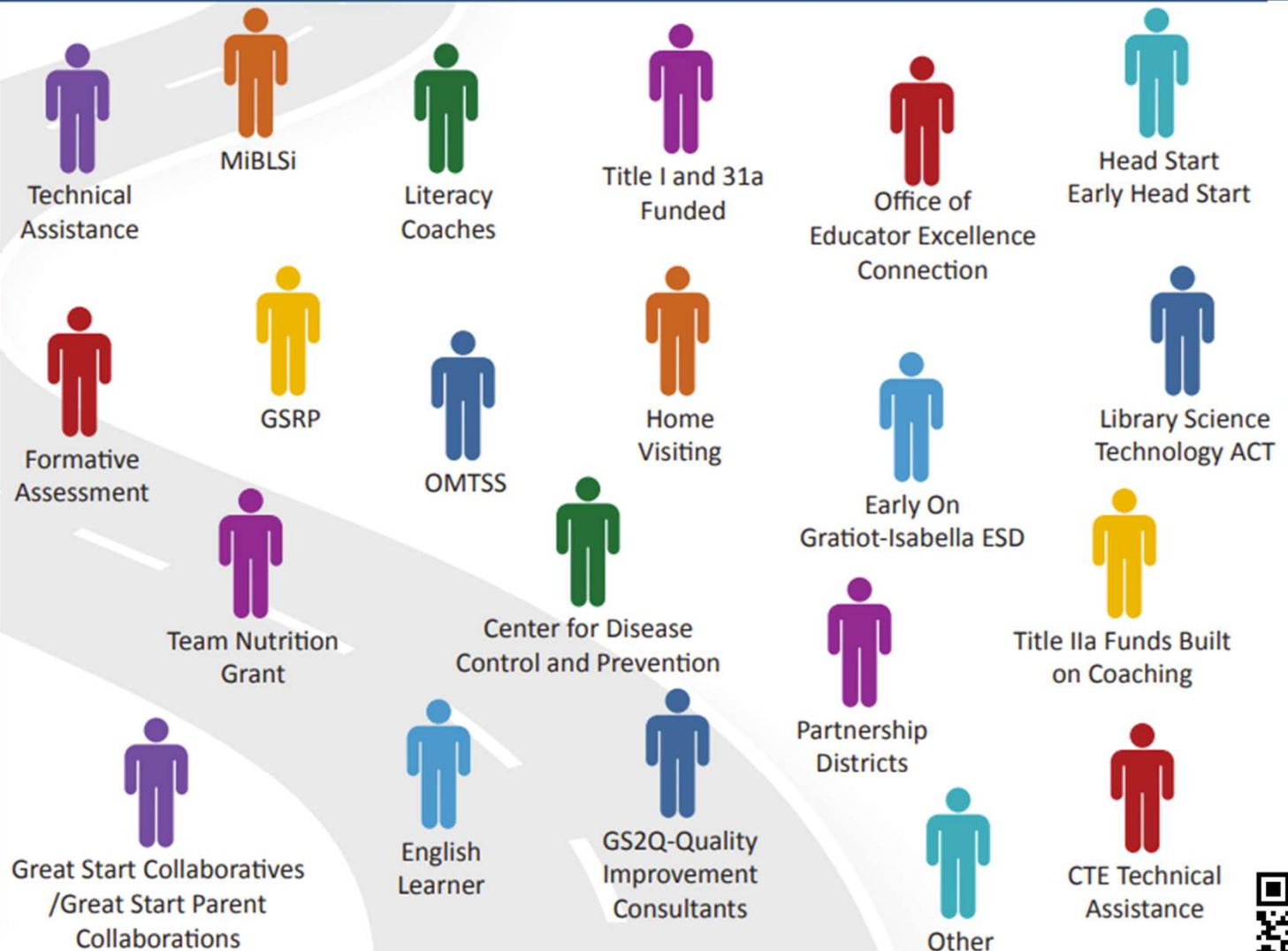
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COACHING EXPECTATIONS

In addition to the coaching definition, coaches are expected to:

- understand how to engage adults in learning
- engage individuals or teams and build collaborative relationships
- be a part of initiatives focused on desired outcomes
- be supported by the organization and administrators.
- engage in their own ongoing professional learning
- be open to giving and receiving feedback for refining their coaching skills
- participate in or collaborate with members of leadership teams
- support the use of data-driven decision making
- provide feedback for growth (not for formal evaluation of an individual)





MICHIGAN - OTTAWA AREA INTERMEDIATE SCHOOL DISTRICT (OAISD)

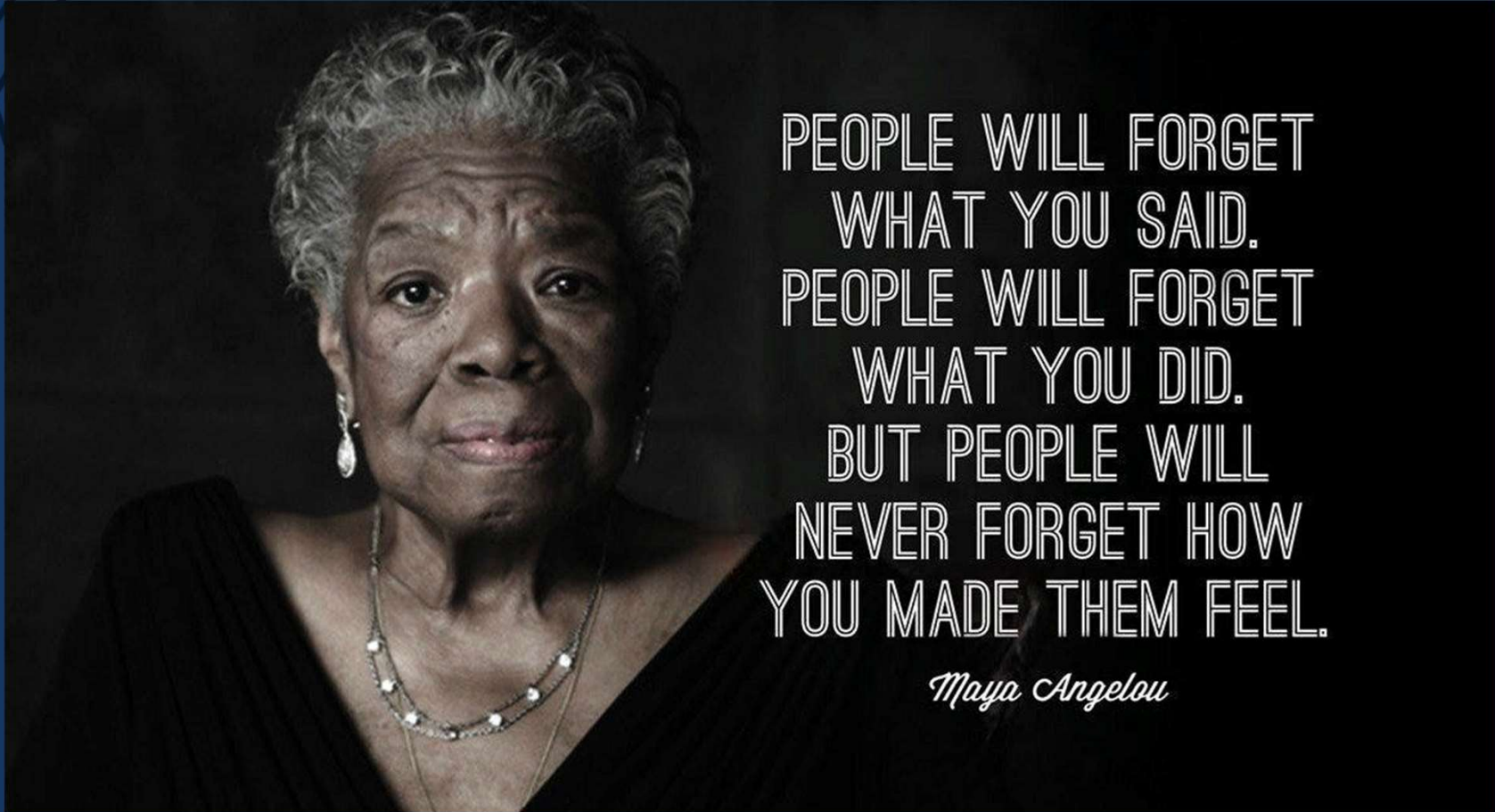
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SETTING THE STAGE FOR COACHING

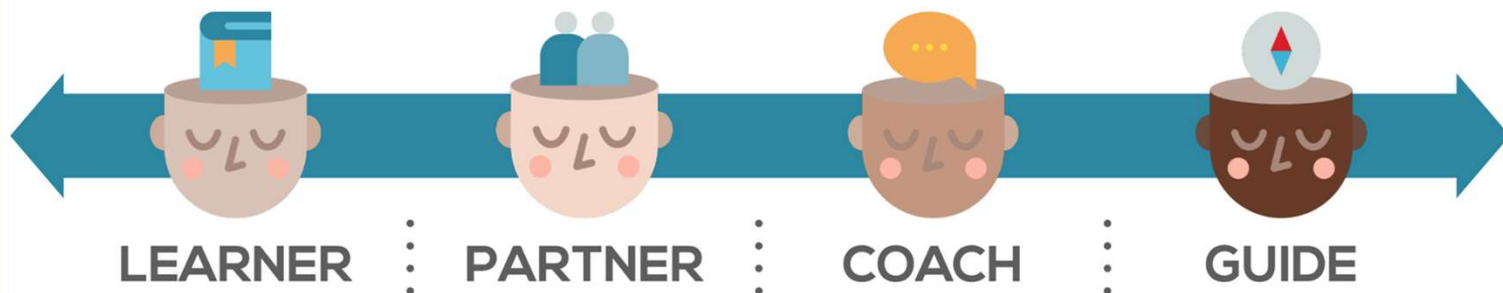


PEOPLE WILL FORGET
WHAT YOU SAID.
PEOPLE WILL FORGET
WHAT YOU DID.
BUT PEOPLE WILL
NEVER FORGET HOW
YOU MADE THEM FEEL.

Maya Angelou



INSTRUCTIONAL SERVICES PERSONAS



Inquisitive	Judgemental	Collaborative	Works in a "Silo"	Active Listening	Primarily Talking	Has Expertise	The "Expert"
Appreciative	Deficit Focused	Consults	"Me" Focused	Facilitates Thinking	Tells	Leads	Directs
Flexible	Rigid	Communicates	Keeps Info	Continuously Supportive	One and Done	Anticipates	Reacts
Seeks Feedback	Assumes	Responsive	Unresponsive	Primarily with the "Team"	Primarily with Others	Provides Feedback	Corrects



INSTRUCTIONAL SERVICES PERSONAS

OUR PERSONAS

(OUR BRAND: What we are known for and how we operate and behave)



LEARNER



PARTNER



COACH



GUIDE

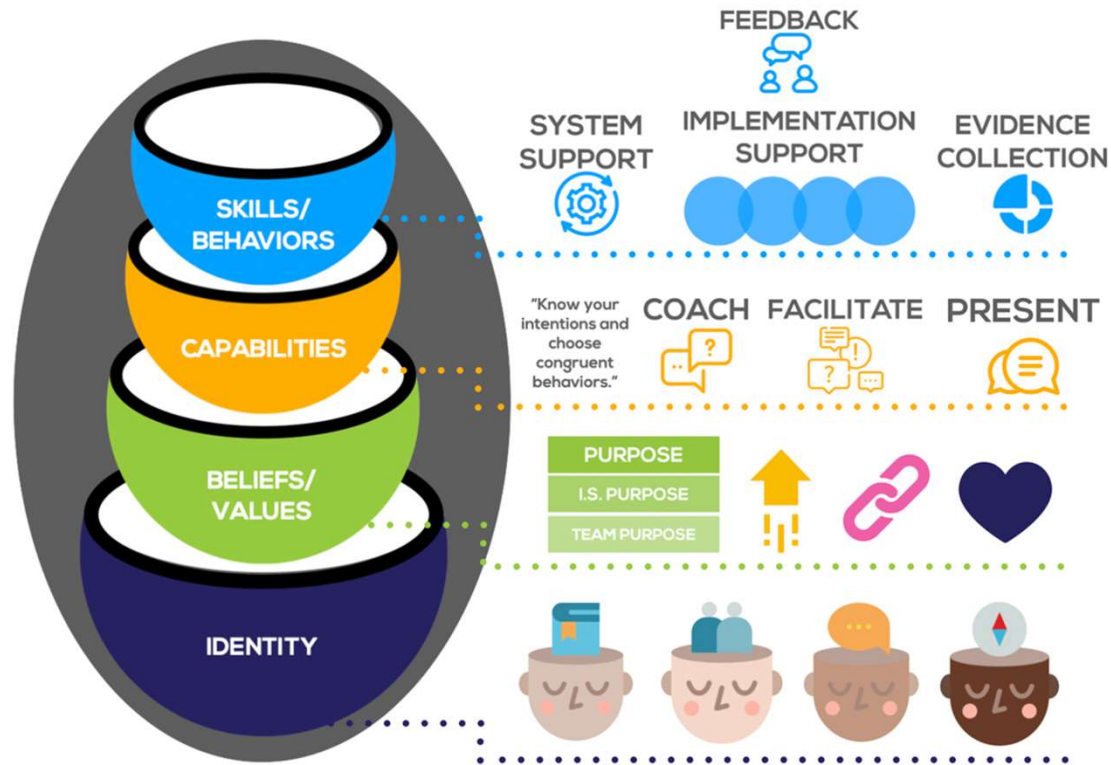
Formation
of Relationship

Developed
Relationship



DILTS DOMAINS OF INFLUENCE

DILTS' DOMAINS OF INFLUENCE FOR INSTRUCTIONAL SERVICES



OAISD MTSS Team

Current Structure/Model

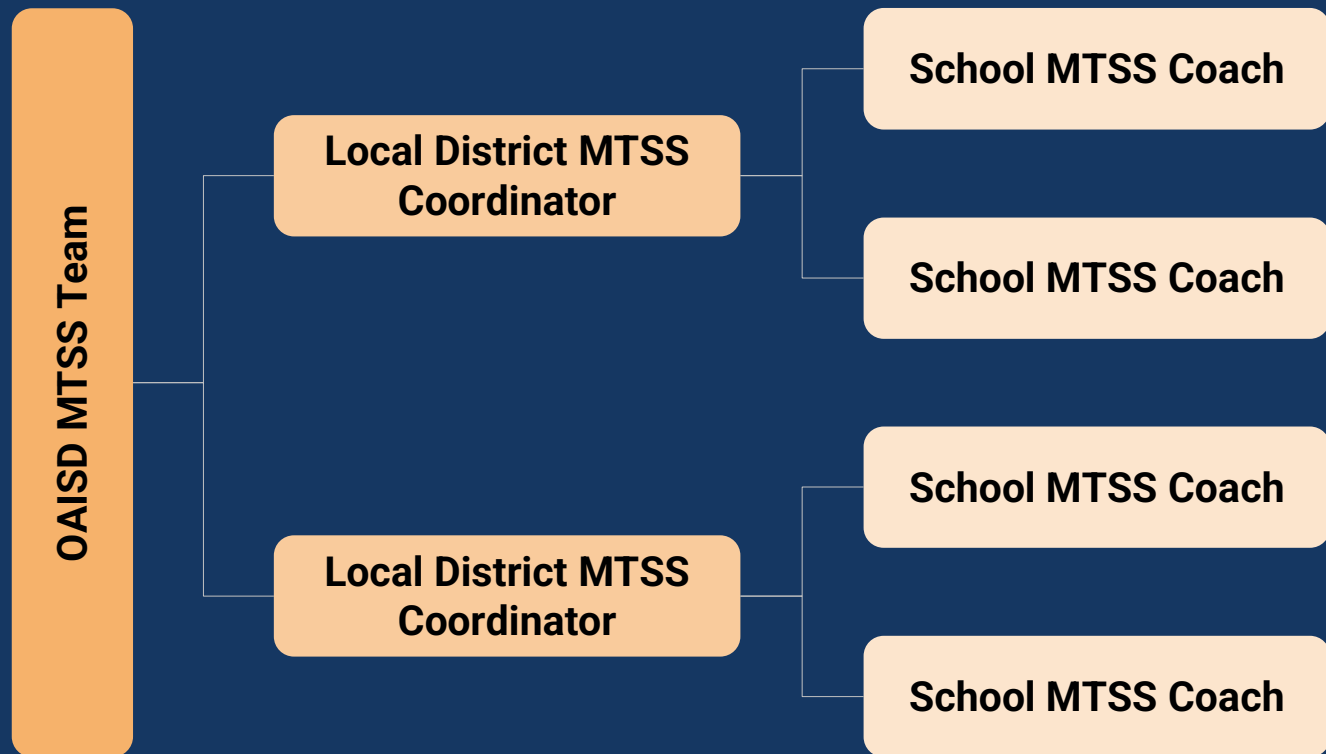
- Project AWARE Grant -
Interconnected Systems Framework
- Formal Partnership Districts
- Readiness Partnership Districts
- Universal Supports

Key Activities

- Training
- Coaching
- Technical Assistance



COACHING model





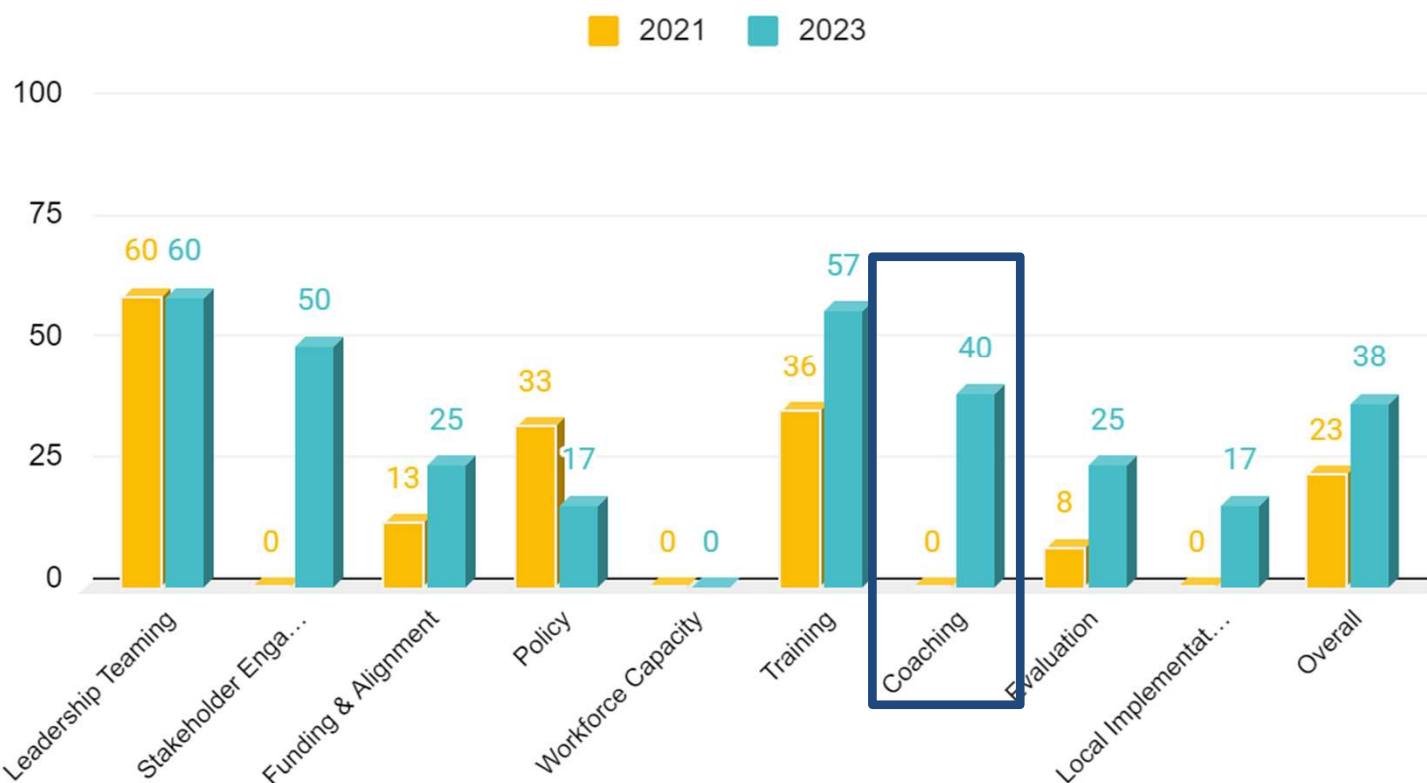
MICHIGAN - WEST SHORE EDUCATIONAL SERVICE DISTRICT

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STATE SYSTEMS FIDELITY INVENTORY - REGIONAL ISF LEADERSHIP TEAM

State Systems Fidelity Inventory - Regional Leadership Team



REGIONAL CAPACITY ASSESSMENT DATA - WEST SHORE ESD

Competency	33% 6/18	39% 7/18	39% 7/18	28% 5/18	50% 9/18	50% 9/18	
3 The Regional Education Agency (REA) uses a process for selecting staff (internal and/or external) who support implementation capacity efforts Notes: Action item - HR interview question	1	1	1	1	1	1	1
4 Regional staff who support implementation have a plan to continuously strengthen skills Notes:	1	1	1	1	1	1	1
8 RIT utilizes a process to operationalize EIs Notes: missing some of the components in #2 criteria	1	1	0	0	1	1	1
13 REA has a coaching system to support districts in developing implementation capacity Notes: Pull criteria from 2 criteria to look at building out the coaching model.			0	0	1	1	1
14 RIT uses a coaching service delivery plan to support district implementation teams Notes:	0	0	0	0	0	0	0
16 RIT secures training for district/building staff Notes:	2	1	2	1	2	2	2

Printed on 10/10/2023

Page 2 of 3

17 RIT supports districts in the use of fidelity measures Notes:	0	2	2	1	2	2	2
23 RIT uses training effectiveness data Notes: Updated the questions.	1	1	1	1	1	1	1
24 RIT uses coaching effectiveness data Notes:	0	0	0	0	0	0	0

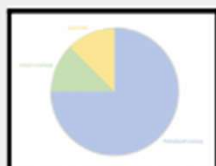




Literacy

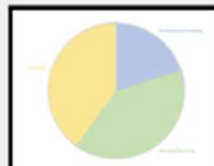
YEAR ONE

Essential Focus TBD



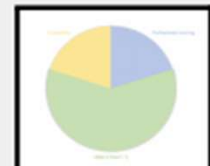
YEAR TWO

Essential Focus TBD



YEAR THREE +

Essential Focus TBD



Professional Learning

Approximately 18-22 Days

K-3 Essential Practices Institute (3)
Advanced Coaching Institute (3)
Coaching Quarterly Meetings (4)
Coaching Essentials Modules
(Asynchronous - 2)
K-3 Essentials Modules
(Asynchronous - 5)
WSESD Monthly Coaching Check-Ins
(Individual)
1hr. X 6 = 1 Day

Approximately 5-9 Days

Coaching Quarterly Meetings (4)
Cognitive Coaching 1-4
(WSESD Stipends)
WSESD Monthly Coaching Check-Ins
(Individual)
1hr. X 6 = 1 Day

Approximately 5-9 Days

Coaching Quarterly Meetings (4)
Cognitive Coaching 5-8
(WSESD Stipends)
WSESD Monthly Coaching Check-Ins
(Individual)
1hr. X 6 = 1 Day

Literacy Coaching

Approximately 3-12 Days

Modeling, Coplanning, Conferencing,
Observing, Assessment Literacy
(Time includes: Planning & Preparation)

Approximately 8.5-17.5 Days

Modeling, Coplanning, Conferencing,
Observing, Assessment Literacy
(Time includes: Planning & Preparation)

Approximately 12-26 Days

Modeling, Coplanning, Conferencing,
Observing, Assessment Literacy
(Time includes: Planning & Preparation)

Literacy Leadership

Approximately 1-10 Days

Co Facilitate Literacy Leadership Team
Meetings
1hr. X 6 = 1 Day
Co Facilitate Professional Learning TBD
(Including Planning & Preparation)

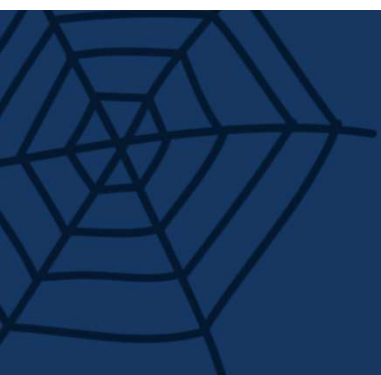
Approximately 8.5-17.5 Days

Literacy Leadership Team Facilitation (6)
1hr. X 6 = 1 Day
(Including Planning & Preparation)
Facilitate Professional Learning
(Including Planning & Preparation)

Approximately 5-9 Days

Literacy Leadership Team Facilitation (6)
1hr. X 6 = 1 Day
(Including Planning & Preparation)
Facilitate Professional Learning
(Including Planning & Preparation)





Professional Learning Plan for Math Coach		
Content	Format	Support
What professional learning might support the math coach? Professional Learning Map	How and when might this learning happen?	What support might be needed from the coaching coordinator at WSESD?
Math Coaching		
Modes	Audience	Format
What coaching services might you provide around the focus area? <input type="checkbox"/> Modeling <input type="checkbox"/> Team-teaching <input type="checkbox"/> Coplanning <input type="checkbox"/> Conferencing <input type="checkbox"/> Observing (Cognitive Coaching: Planning, Observation, Reflecting) <input type="checkbox"/> Assessment Support <input type="checkbox"/> Data Analysis Support <input type="checkbox"/> Other	Who might be the focus of your coaching support?	How will coaching be provided? (1:1, Grade Levels, learning labs, etc.)
Math Leadership		
Content	Purpose	Format
Math Leadership Team Meetings Facilitation <input type="checkbox"/> Facilitating/Co-facilitate Math Leadership Team Meetings <input type="checkbox"/> Coordinate a plan of support around the building focus area	What might be the focus of the Leadership Team's Work?	Who needs to be on this team? How and when might the team meet to move the work forward? (Dates/Times)
Content	Audience	Format
Math Professional Learning for the Building <input type="checkbox"/> Facilitating/Co-facilitate PL at staff meetings, PLC days, etc.	Who should attend this professional learning?	How and when might this PL be offered? (Dates/Times)



Under
Construction

Coaching Service Delivery Model West Shore ESD



Goal of Coaching: To increase the capacity and competency of coaches, district leadership teams, building leadership teams, and all staff when implementing a Multi-Tiered System of Supports (MTSS) model, resulting in increased fidelity, sustainability, and data-based decision making at all levels.



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10/27/2023

Session ID- 5H - Building Coaching Through Intentional Capacity Building

Four options, pick one!

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Click "Take Survey" under the session description.

2. QR Code

Scan the code on this slide.



3. Online

Click on the link located next to the downloadable session materials posted online at:

www.pbis.org/conference-and-presentations/pbis-leadership-forum

4. Direct Link

Click the link provided in the email reminder you receive after your session ends.



After you submit each session evaluation, click the link to enter the **gift card raffle!**

*Evaluations are **anonymous!** We send reminder emails to all participants.*

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Write a closing statement or call-to-action here.

THANK YOU

