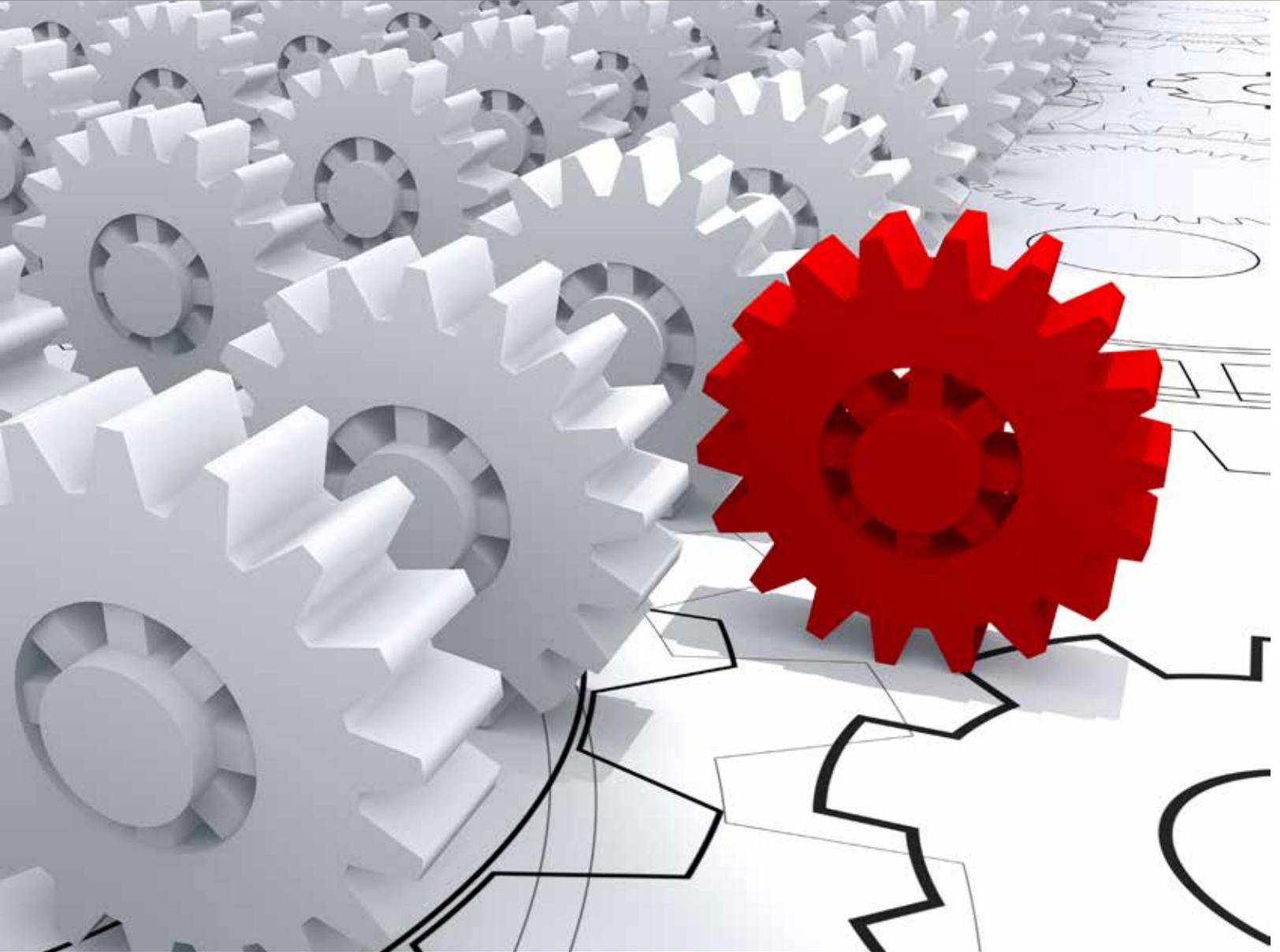


# Missouri Leadership Development System (MLDS)



## Emerging Level Participant **GUIDE**



## **Missouri Leadership Development System (MLDS)**

### **Emerging Leader Participant Guide**

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Sincerely,

Mike Rutherford  
September 1, 2016



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# Overview

## The Missouri Leadership Development System (MLDS)

The primary purpose of the Missouri Leadership Development System (MLDS) is the development and support of effective school leaders. Effective school leadership is an essential factor to ensure equitable access to excellent education for all Missouri students.

In the fall 2014, a group of key stakeholders currently engaged in principal development and support were convened by the Department of Elementary and Secondary Education (DESE) to identify the essential competencies of a transformational principal. Transformational principals are effective leaders who work with and through a broad range of stakeholders and contexts to create high quality learning opportunities for students. Transformational principals are leaders who collaborate with others to identify needed changes to enhance student learning. These main competencies of transformational leadership were clustered into 5 categories:

## The Transformational Principal is...



These 5 categories, or domains, summarize the main roles a principal must assume, often times simultaneously, to effectively lead a school that is focused on instruction. Each domain is described through a particular set of competencies.



The competencies, or specific skills necessary in each role, were created and projected across the MLDS Continuum. The MLDS Continuum extends from aspiring, to emerging, to developing and then to transformational. Each level occurs throughout a principal’s career beginning with preparation.

Professional development and support are necessary to ensure a leader’s progression across the continuum indicating their mastery of the competencies at each of the four levels.

The **Principal** as the **Instructional Leader** ensures a guaranteed and viable curriculum.

**Leadership Competency #4**—Engages and supports staff to vertically and horizontally align curriculum to state/district standards (PSEL 4a,b;6d; 9i;10a,e)

Aspiring Leader	Emerging Leader	Developing Leader	Transformational Leader
Understands standards as they apply to horizontal and vertical alignment of local curricula and content areas.	Examines and becomes familiar with the existing curriculum and learning standards.	Facilitates staff discussions to ensure curriculum is comprehensive, rigorous, aligned, and engaging and supports continuity and fidelity across all grades and content areas.	Ensures staff regularly collaborates to continuously monitor and adjust the vertical and horizontal alignment of the curriculum to improve student learning.

The **Distinguished Transformational Leader** coaches, trains and/or mentors others in how to ensure a guaranteed and viable curriculum.

The **Principal** as the **Instructional Leader** ensures a guaranteed and viable curriculum.

**Leadership Competency #5**—Supports staff use of a variety of research-based practices appropriate to the intended content. (PSEL2b; 4b,c,d,e; 10a,f)

Aspiring Leader	Emerging Leader	Developing Leader	Transformational Leader
Understands a variety of research-based instructional practices and how to appropriately match learning content	Identifies existing instructional practices and reinforces those that are appropriate to the learning content	Builds teacher capacity with a variety of instructional practices appropriate to the learning content	Facilitates opportunities for collaboration and modeling of instructional practices appropriate to the learning content

**Leadership Competency #6**—Observes classroom instruction and provides meaningful and timely feedback on teacher practice and student response. (PSEL2b; 4b,d;6a,e,f;10c,e,f)

Understands and engages in meaningful feedback related to effective teacher practice	Observes classroom instruction and provides meaningful and timely feedback to build teacher practice and student response	Observes classroom instruction and provides meaningful and timely feedback to intentionally meet individual teacher strengths and areas for growth	Develops a systemic process for the continuous improvement of all teachers’ instructional practice
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There are approximately 2,200 principals and 1,300 assistant principals currently serving in Missouri schools. In addition, there is an estimated 1,100 that earn an administrator certificate each year. These active and future principals likely have mastery or partial mastery of some of the competencies at the various levels while still needing new learning and additional support to develop mastery in others. This training and support will be necessary in order to achieve the goal of having a transformational principal in every school.

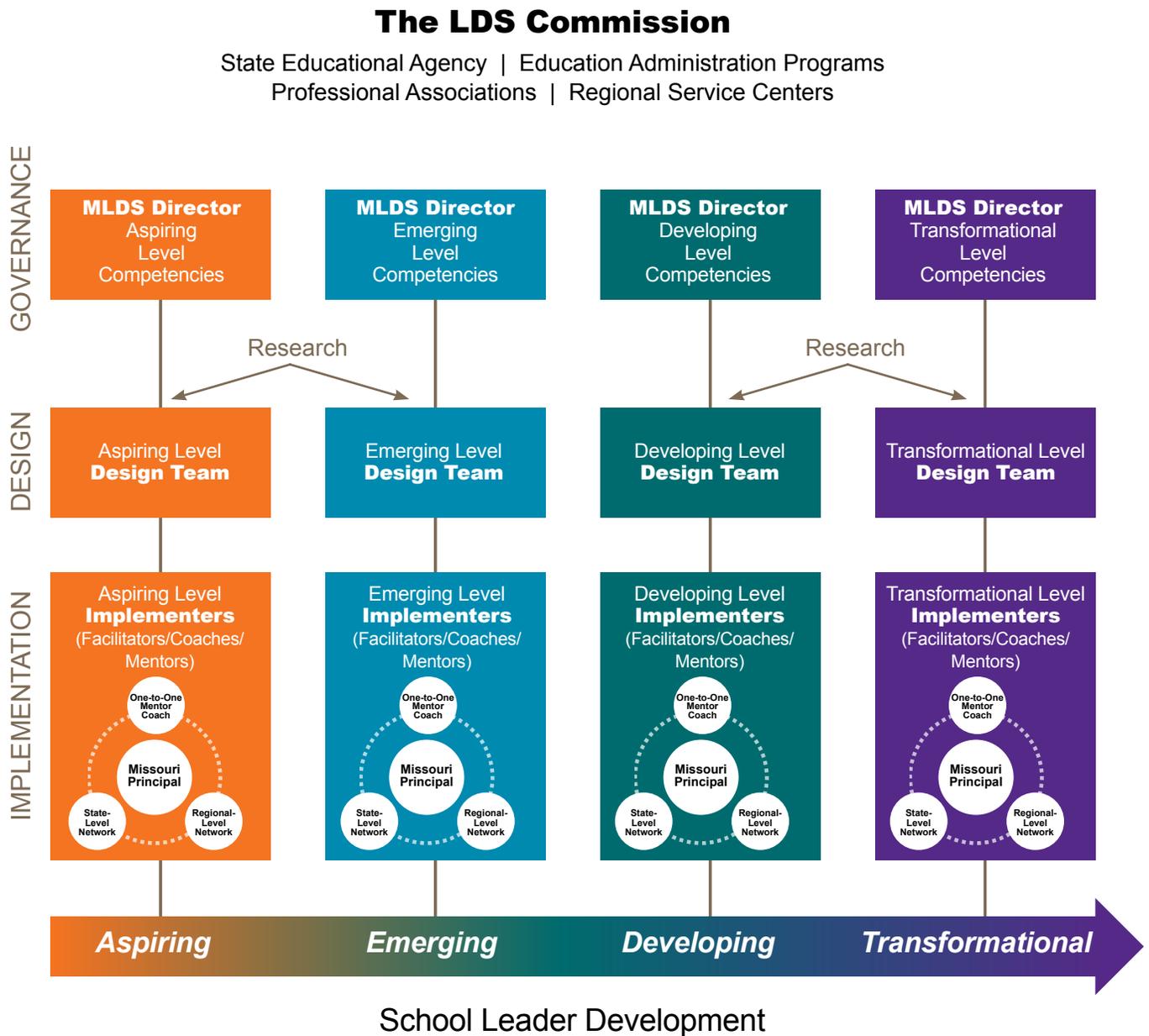


# MLDS Commission, Design Team, Meetings and Members

The MLDS organizational structure is designed to deliver the training and support necessary to ensure Missouri principals master the essential competencies of the MLDS. The key components of this delivery system include:

- Governance
- Design
- Implementation by facilitators, coaches, and mentors

This organizational chart demonstrates the relationship between the various levels of the MLDS:



## Governance

The governance component of the MLDS is responsible for establishing and executing the processes of interaction and decision-making among the key stakeholders involved in training and supporting effective transformational leaders in Missouri's schools. Governance for the MLDS is provided through two separate elements:

- MLDS Commission
- MLDS Directors

The MLDS Commission is a body of 12-15 key stakeholders representing the state agency, education administration programs, professional organizations, practitioners and regional service providers. The state agency (DESE) chairs the commission. The MLDS has the following Mission and Vision:

***The Vision of the LDS is that every school in Missouri will be led by a highly effective principal***

***The Mission of the LDS is to develop highly effective school principals in Missouri by creating a leadership development system to ensure excellent school leadership in service to all students***

The MLDS Commission and MLDS Directors meet quarterly and participate in regular professional development to ensure the competencies of the system remain current and relevant and its implementation efficient and effective. The duties of the MLDS Commission, among others, include the following areas:

- Vision, mission, values and goals that further the main focus of the MLDS and drive the development of action plans, meeting topics, agendas, etc.;
- A Business Plan that includes funding for the system, pricing and negotiation and ongoing investment;
- Human Resources for the system such as generating job descriptions for designers and implementers and selecting and acquiring directors;
- Communication to all key stakeholders about important topics and information like marketing, recruiting, quality, etc.; and
- Succession planning to maintain the integrity of the system and ensure appropriate and necessary representation.

An additional element of governance for the MLDS occurs through individuals who serve as directors for each of the levels. There is one Lead Director who oversees the Emerging Level of the MLDS. The MLDS Directors meet 4-6 times per year. These directors oversee essential functions in each of the 4 levels of the MLDS Continuum:

- Aspiring Level – preparation phase, or pre-service, that results in an administrative certificate
- Emerging Level – the initial years of practice resulting in readiness for the next phase
- Developing Level – the subsequent years of practice after the initial years when leadership skills are further developed and refined resulting in readiness for the next phase
- Transformational Level – the target phase when principals possess the necessary skills and knowledge to lead schools fully responsive to the learning needs of its students
- The Distinguished Transformational Principal – a select percentage of principals of proven effectiveness able to coach, train and mentor other principals through the LDS continuum

The MLDS Directors report to the MLDS Commission on various areas specific to their particular leadership level of development. The specific areas of a level of the MLDS Continuum for which they oversee and are accountable include the following:

- Lead a team of designers in creating learning content, activities and materials specific to a particular level of the system
- Oversee a team of implementers to ensure that quality training and support are provided to all principals on the competencies of that particular level of the system



- Ensure consistency and alignment of training, support and implementation across the four levels of the MLDS Continuum
- Actively participate in the evaluation of processes and outcomes at a particular level of the system to ensure principals are successfully mastering appropriate competencies resulting in effective school leadership
- Regularly provide information to the MLDS Commission regarding the effectiveness of the training and support provided to principals in mastering specific competencies in that particular level of the system

The interdependent work of the MLDS Commission and Directors provide for the efficient and effective management and execution of the MLDS System in service to Missouri principals as they develop, acquire and apply essential leadership knowledge and skills necessary for the success of all students.

## Design

The design phase of the MLDS is responsible for constructing a plan for delivering training and support to principals in their efforts to master the leadership competencies for each level of the MLDS Continuum. The Design team for each level will generally consist of 10-15 individuals tasked with the following:

- Actively participate in facilitator training to effectively deliver the learning experiences contained in this facilitator guide
- Develop training and support materials (e.g. articles/reading material, video, case studies, activities, tasks, tools, etc.) to assist principals in mastering competencies at each particular level
- Prepare those who facilitate, coach, and mentor to train and support principals in a way that ensures the fidelity of the delivery of materials at a particular level of the MLDS Continuum
- Participate in exercises/activities with other designers in the MLDS Continuum to ensure consistency and alignment of principal training and support
- Provide feedback and evaluative information to the MLDS Director for a particular level of the MLDS Continuum

High-quality models from other states and districts were gathered by the professional associations to inform the development of the domains, competencies and continuum of the LDS. Information, tools and other appropriate resources from the Rutherford Learning Group (RLG), the School Administration Manager (SAMs) Project, and other relevant research inform the learning materials that will be created for each of the four levels of the MLDS Continuum. Ongoing research will be conducted to ensure the competencies of the system remain current and relevant and its implementation efficient and effective.

The Emerging Level Design Team for the MLDS worked through a formal process in order to create six separate learning experiences for early career school administrators. A formalized process is an important step as it builds commitment while a product alone simply builds compliance. This formal design process occurred over a span of four months featuring a major work session each month. Additional background and preparation work occurred in between each of the four major work sessions. The Emerging Level Design Team first began with an exercise in capacity mapping which identified the strengths and interests of the design team members. The team next developed a mission, vision and core values. These included the following:

**Mission** – The Missouri Leadership Development System is a comprehensive research- based program which ensures every student in Missouri will attend school with an effective confident leader by developing, supporting and refining the leadership capacity of all Missouri school principals.

**Vision** – Create a comprehensive leadership development system of learning experiences that include comprehensive, relevant and engaging treatments that will serve as a blueprint for developing and supporting transformation school principals.

**Core Values** – Equity (statewide consistency), Fidelity, Sustainability, Relevance, High Quality



# Adult Learning Theory

The Emerging Level Design Team used guiding principles as it developed treatments that would be included in various learning experiences. These guiding principles included:

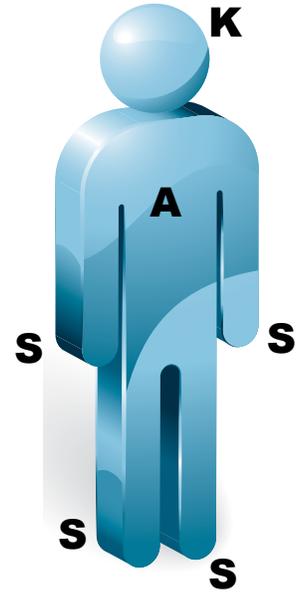
## Guiding Principle 1: Knowledge, Skills and Attitudes (ksas)

Knowledge, skills and attitudes combine to reflect particular characteristics necessary to do a job effectively.

**K** – knowledge: basic understanding, content

**S** – skills: can do, demonstrate, explain, coach

**A** – attitudes: based on experience, commitment to helping other grow



## Guiding Principle 2: WHY before the WHAT and HOW

A Learning continuum reflects a sequence of skills building from one level of difficulty or complexity to the next. The skills are cumulative meaning current skills are added to skills learned at an earlier level.

**Awareness** – knowledge, the why, basic understanding (THEN)

**Early skill building** – modeling, practice learning, trial and error (THEN)

**Advance skill building** – continuous improvement and reflection (THEN)

**Leadership/Renewal** – Articulate model for others, collaboration

## Learning Continuum



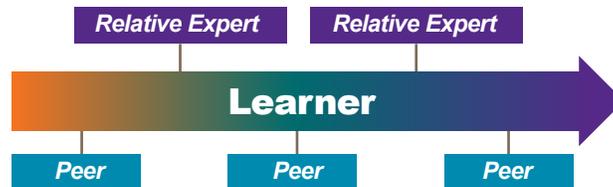
## Guiding Principle 3: Designing for Sustainability

To sustain is to endure or continue. A balance between support and expectations is a necessity for optimal learning to occur. As expectations increase so should support.



## Guiding Principle 4: Optimal spacing of work with peers, relative experts and established experts

Lev Vygotsky developed the Zone of Proximal Development to describe what a learner can do with help and what they can do without help. This theory is used to optimally determine when learners should interact with peers, relative experts and established experts (Vygotsky, 1980).



The formal process also included clarification of the MLDS competencies. This involved “unpacking” the language of the competencies to determine their specific intent. This was important in order to ensure that treatments and learning experiences appropriately addressed the intent of the competency. The process of unpacking each of the 32 competencies involved special attention regarding:

- Essence of the competency
- Use of Nouns
- Use of Verbs
- Use of Modifiers
- Implications



## Developing Learning Experiences

Once the competencies were unpacked, they were grouped into authentic learning experiences. A learning experience is an interaction or activity in which learning takes place. Within each learning activity are various treatments. These treatments, or methods based like activities or events, were created to fully develop each of the learning experiences.

The MLDS Design Team next identified various engagement platforms. An engagement platform refers to the means by which the learner is introduced to learning. The engagement platforms included the following:

- Regional Meetings
- Conferences
- Learning Labs
- District Push-In
- One-to-One Mentoring / Coaching
- Retreats
- Online Events
- Twitter Events

The various learning experiences with their treatments are delivered as training and support to principals through an engagement platform. These learning experiences were placed across a two year timeline to coincide with the Missouri requirement that new school leaders be mentored for their first two years. The two year timeline is provided on the following page.



# Missouri Leadership Development System (MLDS)

## 2-Year Implementation Calendar

LE 1 Critical Firsts | 
 LE 2 Excellent Instruction | 
 LE 3 Understand Self & Others | 
 LE 4 Decision Making | 
 LE 5 Shaping School Culture | 
 LE 6 Making Time

2016	July	Engagement Platform <b>Regional Meeting</b>	LE 1	LE 2	LE 3	LE 6			
	Aug.	Engagement Platform <b>Online Event</b> / Connect/Extend Regional Meeting	LE 1	LE 2	LE 3	LE 6			
	Sept.	Engagement Platform <b>Learning Lab</b>	LE 2						
	Oct.	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Regional Meeting Connect/Extend Learning Lab	LE 1	LE 2	LE 3	LE 6			
	Nov.	Engagement Platform <b>Regional Meeting</b>	LE 4	LE 6					
	Dec.	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Regional Meeting	LE 1	LE 2	LE 3	LE 6			
	2017	Feb.	Engagement Platform <b>Regional Meeting</b>	LE 2	LE 3	LE 4	LE 5	LE 6	
		Mar.	Engagement Platform <b>Learning Lab</b> Engagement Platform <b>Online Event</b> / Connect/Extend Regional Meeting	LE 2	LE 2	LE 3	LE 4	LE 5	LE 6
		May	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Regional Meeting Connect/Extend Learning Lab	LE 2	LE 3	LE 4	LE 5	LE 6	
		July	Engagement Platform <b>Regional Meeting</b>	LE 5	LE 6				
		Aug.	Engagement Platform <b>Learning Lab</b> / Connect/Extend Learning Lab	LE 2					
		Sept.	Engagement Platform <b>Learning Lab</b> / Connect/Extend Learning Lab	LE 2					
2018	Oct.	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Regional Meeting Connect/Extend Learning Lab	LE 5	LE 6	LE 2				
	Nov.					LE 2			
	Dec.	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Learning Lab					LE 2		
	Jan.								
	Feb.	Engagement Platform <b>Regional Meeting</b>	LE 2	LE 3	LE 5	LE 6			
	Mar.	Engagement Platform <b>Online Event</b> / Connect/Extend Regional Meeting Engagement Platform <b>Learning Lab</b>	LE 2	LE 3	LE 4	LE 5	LE 6		
	April	Engagement Platform <b>Mentor/Coach</b> / Connect/Extend Regional Meeting	LE 2	LE 3	LE 4	LE 5	LE 6		
	May								
	June								



The Emerging Level design team participated in four major work sessions over four months to develop learning experiences and treatments.

- **Work Session 1**

- Map the capacity of the design team members
- Develop a mission, vision, values and norms
- Introduce design principles
- Clarify MLDS domains and competencies
- Clarify and discern client (end-user)
- Develop initial treatments
- Develop a crosswalk of MLDS competencies to the Professional Standards for Education Leaders (PSEL)
- Capture artifacts for MLDS work space

- **Work Session 2**

- Construct anchor charts for the four design principles
- Unpack the 32 MLDS Emerging Level competencies
- Introduce Idealized Design principles
- Engage in Formative Design work to assemble competencies into learning packages
- Present tentative learning experiences for group review
- Capture artifacts for MLDS work space

- **Work Session 3**

- Finalize Formative Design work
- Identify engagement methods and approaches
- Introduce the Summative Design work
- Present tentative experiences into corresponding engagement platforms
- Assign engagement platforms across two year timeline
- Capture artifacts for MLDS work space

- **Work Session 4**

- Finalize treatments within learning experiences across a two year timeline
- Draft language for a facilitator training manual
- Train on each treatment within first quarter learning experiences
- Capture artifacts for MLDS work space

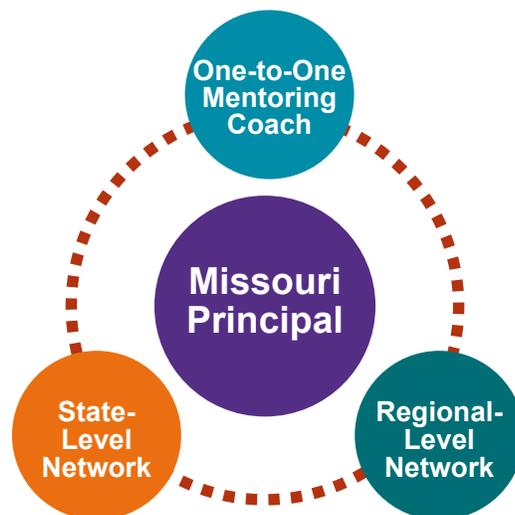


## Implementation

The implementation component of the MLDS is responsible for putting into effect or executing the training and support developed by the MLDS Designers. Facilitators, coaches and/or mentors (implementers) work directly with Missouri principals to assist them as they work to master the leadership competencies associated with particular levels of the MLDS Continuum. The Implementation team for each level will generally consist of 20-40 individuals tasked with the following:

- Providing direct training and support to principals using appropriate learning materials (e.g. printed material/articles, video, case studies, activities, tasks, tools, etc.) which result in principals mastering competencies at each particular level of the continuum
- Delivering training and support that ensures a fidelity of delivery across the MLDS Continuum
- Participating in exercises/activities with other implementers in the MLDS Continuum to ensure consistency and alignment of training and support
- Providing feedback and evaluative information to the MLDS Design team and Director for each particular level of the MLDS Continuum

MLDS Implementation by facilitators, coaches and/or mentors occurs across three separate layers of training and support. These various layers work interdependently to ensure efficient and effective support and development for the principal.



One-to-one mentoring and coaching is provided at the Emerging and Developing Levels. Additional coaching occurs at the Transformational Level. Facilitation of networks with other principals occurs regionally in smaller groups. Networking also occurs through a series of state meetings where all principals gather and participate in professional development together.

The training, support, mentoring, coaching, regional and state networks provided by the MLDS Implementation Teams result in principals mastering competencies at each level of the MLDS Continuum.



# Crosswalk: Learning Experiences – MLDS Competencies – PSEL

## Learning Experience

## MLDS Competencies

## Professional Standards for Educational Leaders (PSEL)



### Critical Firsts

Managerial 10	safe and functional school	2a; 5a,c; 8g; 9e; 10h
Managerial 11	routines, procedures, schedules	3d,e; 5a,c,e; 9a,e,f,h,j; 10a
Managerial 13	clear expectations and guidelines	2a,d,f; 4a; 7a,c; 9b,h; 10a,f
Relational 19	resources support student well-being	2c,e,f; 3a,b,c,d,f,h; 5b; 8e,g,l; 10a
Relational 20	positive relationships with students	2e; 3a,b,d; 5b,d,e)
Relational 21	positive relationships with staff	2a,e,f; 7e; 9j
Relational 24	positive relationships with families	2d; 3a,h; 5d,f; 8a,b,c,d,g; 10a
Relational 25	positive relationships with community	3f; 5d,f; 8a,b,c,d,f,g,j; 10c
Innovative 27	engages in professional networks	6i; 10g
Innovative 30	applies time management practices	6i



### Recognizing and Developing Excellent Instruction

Visionary 3	examines data to evaluate mission	1d,e; 4a; 6e; 9a; 10a,b,g
Instructional 4	examines existing curriculum	4a,b; 6d; 9i; 10a,e
Instructional 5	identifies existing instructional practices	2b; 4b,c,d,e; 6d,e; 10a,f
Instructional 6	conducts observations and gives feedback	2b; 4b,d; 6a,e,f; 10c,e,f
Instructional 7	assesses use of assessments	4a,b,f; 6d
Instructional 8	assess teacher use of data	2c; 3a; 4b,g; 6e; 7g; 9g; 10a,c,e,g,h
Instructional 9	uses data for professional learning	6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g
Managerial 12	analyzes personnel strengths & weaknesses	6a,b; 9b; 10a
Innovative 26	gathers knowledge, skills and best practices	4c,e; 6f; 10a,c,f,i
Innovative 31	acts to promote student learning	2a; 3g,h; 7f; 8h; 9f; 10d,i
Innovative 32	considers change promoting student learning	2b; 3f; 7f; 8j; 9f; 10d,e,i



### Understanding Self and Others

Visionary 1	examines existing core values and culture	1a,b,d,e; 5f; 7c; 10c
Visionary 2	examines communication of vision/mission	1c,d,f,g; 5f; 8c,h; 9l
Visionary 3	examines data to evaluate mission	1d,e; 4a; 6e; 9a; 10a,b,g
Instructional 9	uses data for professional learning	6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g
Managerial 11	routines, procedures, schedules	3d,e; 5a,c,e; 9a,e,f,h,j; 10a
Relational 18	analyzes diversity of the school	1c; 2d,e; 3a,b,c,e,f; 4a; 5b; 7b,d; 10a,c
Relational 20	positive relationships with students	2e; 3a,b,d; 5b,d,e)
Relational 21	positive relationships with staff	2a,e,f; 7e; 9j
Relational 22	analyzes culture of support/respect	2b,d,e,f; 3g,h; 6h; 7a,b,c,d,e,g; 9k; 10a,d,f
Relational 23	Identifies potential teacher leaders	6g; 7b,d,h; 10a,e,j
Relational 24	positive relationships with families	2d; 3a,h; 5d,f; 8a,b,c,d,g; 10a
Relational 25	positive relationships with community	3f; 5d,f; 8a,b,c,d,f,g,j; 10c
Innovative 27	engages in professional networks	6i; 10g
Innovative 28	reflects on leadership experiences	2b; 6i; 10c,g,h
Innovative 29	receptive to feedback	6i; 10c,g,h
Innovative 30	applies time management practices	6i



## Crosswalk: Learning Experiences – MLDS Competencies – PSEL

### Learning Experience

### MLDS Competencies

### Professional Standards for Educational Leaders (PSEL)



#### A Primer on Decision Making

Visionary 1	examines existing core values and culture	1a,b,d,e; 5f; 7c; 10c
Visionary 3	examines data to evaluate mission	1d,e; 4a; 6e; 9a; 10a,b,g
Instructional 9	uses data for professional learning	6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g
Managerial 10	safe and functional school	2a; 5a,c; 8g; 9e; 10h
Managerial 11	routines, procedures, schedules	3d,e; 5a,c,e; 9a,e,f,h,j; 10a
Managerial 12	analyze personnel strengths and needs	6a,b; 9b; 10a
Managerial 14	Use data to determine interventions/support	6a,b,c,h; 9k; 10f
Relational 18	analyzes diversity of the school	1c; 2d,e; 3a,b,c,e,f; 4a; 5b; 7b,d; 10a,c
Relational 19	resources support student well-being	2c,e,f; 3a,b,c,d,f,h; 5b; 8e,g,l; 10a
Innovative 26	gathers knowledge, skills and best practices	4c,e; 6f; 10a,c,f,i
Innovative 28	reflects on leadership experiences	2b; 6i; 10c,g,h
Innovative 31	acts to promote student learning	2a; 3g,h; 7f; 8h; 9f; 10d,i
Innovative 32	Considers change promoting student learning	2b; 3f; 7f; 8j; 9f; 10d,e,i



#### Reading and Shaping School Culture

Visionary 1	examines existing core values and culture	1a,b,d,e; 5f; 7c; 10c
Visionary 2	examines communication of vision/mission	1c,d,f,g; 5f; 8c,h; 9l
Visionary 3	examines data to evaluate mission	1d,e; 4a; 6e; 9a; 10a,b,g
Instructional 5	identifies existing instructional practices	2b; 4b,c,d,e; 6d,e; 10a,f
Instructional 9	uses data for professional learning	6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g
Managerial 12	analyzes personnel strengths & weaknesses	6a,b; 9b; 10a
Managerial 14	Use data to determine interventions/support	6a,b,c,h; 9k; 10f
Relational 20	positive relationships with students	2e; 3a,b,d; 5b,d,e)
Relational 21	positive relationships with staff	2a,e,f; 7e; 9j
Relational 22	analyzes culture of support/respect	2b,d,e,f; 3g,h; 6h; 7a,b,c,d,e,g; 9k; 10a,d,f
Innovative 31	acts to promote student learning	2a; 3g,h; 7f; 8h; 9f; 10d,i
Innovative 32	Considers change promoting student learning	2b; 3f; 7f; 8j; 9f; 10d,e,i



#### Making Time for Instructional Leadership

Visionary 3	examines data to evaluate mission	1d,e; 4a; 6e; 9a; 10a,b,g
Instructional 9	uses data for professional learning	6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g
Managerial 11	routines, procedures, schedules	3d,e; 5a,c,e; 9a,e,f,h,j; 10a
Managerial 12	analyzes personnel strengths & weaknesses	6a,b; 9b; 10a
Managerial 14	Use data to determine interventions/support	6a,b,c,h; 9k; 10f
Innovative 28	reflects on leadership experiences	2b; 6i; 10c,g,h
Innovative 30	applies time management practices	6i
Innovative 31	acts to promote student learning	2a; 3g,h; 7f; 8h; 9f; 10d,i
Innovative 32	Considers change promoting student learning	2b; 3f; 7f; 8j; 9f; 10d,e,i



# Missouri Leadership Development System (MLDS)

## Nomenclature, sequence, and structure:

The thirty-two MLDS emerging level leader competencies are not addressed individually and in sequence. Rather, they are embedded in six larger, more authentic, Learning Experiences (LE). The six learning experiences, other than portions of LE 1, Critical Firsts, which specifically address beginning of the year issues, are not presented in a dependent sequence. The six LEs are designed to engage administrators across a span of two years in multiple engagement platforms, or venues, such as regional meetings, state conferences, coaching/mentoring sessions, or learning labs. Each LE is comprised of a number of treatments, that represent specific activities and approaches designed to foster mastery of the competencies. The treatments that comprise each of the six LEs are presented in the recommended sequence (unless otherwise noted) that best accomplish the aims of the LE.

## Emerging Level Learning Experience 1:



**Critical Firsts-** How successful school leaders build positive momentum by succeeding at key initial leadership tasks and opportunities.

### Introduction and Rationale:

As the saying goes, “One doesn’t get a second chance to make a first impression.” First impressions constructed from initial experiences are memorable and persistent (Srivastava, Guglielmo, & Beer, 2010). These initial perceptions shape beliefs that are difficult to alter, even in light of contradictory new experiences (Gawronski, Rydell, Vervliet, & DeHouwer, 2010). In his study, “Getting Off on the Wrong Foot: The Timing of a Breach and the Restoration of Trust,” Ohio State University researcher Robert Lount (2008) maintains

*First impressions matter when you want to build a lasting trust. If you get off on the wrong foot, the relationship may never be completely right again. It’s easier to rebuild trust after a breach if you already have a strong relationship.*

The idea that first experiences are extra memorable has a long and extensive history in teaching-learning theory. Harold Gullickson’s 1936 study *The Relationship Between Degree of Original Learning and the Degree of Transfer*, was one of the earliest contributions. Madeline Hunter, in the mid-1980s, included *degree of original learning* as one of the key factors in transfer theory (Hunter, 1982), as did David Sousa in his 1995 book *How the Brain Learns*. More recently, Mike Rutherford (2013), in *The Artisan Teacher: A Field Guide to Skillful Teaching*, devoted an entire chapter to the practice of designing initial learning experiences to take advantage of a student’s natural tendency to recall easily and transfer broadly anything that is judged to be new, novel, or different.

In school leadership, as in life and in the classroom, not every task or interaction is equal in its impact. Initial experiences are like double coupons. They carry their own content and effect, and, more importantly, set the template and expectation for future experiences. In practical terms then, a school administrator’s first faculty meeting, first contact with staff, first weekly memo, first Professional Learning Community (PLC) meeting, or first \_\_\_\_\_ (fill in the blank) are indeed critical firsts. As such, they are worthy targets for careful planning, sharp design, and best efforts.

In Critical Firsts, the school administrator learns the importance of making a positive impact as an emerging leader. The experience helps school administrators be more proactive and purposeful as they plan initial school engagements. Participants will examine best practices, tools, and protocols for designing successful first opportunities typical of the opening of a new school year.

The learning experience Critical Firsts seeks to:

- A. Increase emerging level leaders’ awareness of the large and persistent effects of first experiences.
- B. Identify key windows of opportunity for creating success and positive momentum in typical, beginning of the year school experiences.



- C. Provide school leaders with practical and timely strategies for creating successful and future-shaping initial school experiences.

### **MLDS Engagement Platforms and Treatments for LE 1**

Critical Firsts- How successful school leaders build positive momentum by succeeding at key initial leadership tasks and opportunities.

#### **Treatment 1: Introduction to AMP and MLDS**

(approximate time allotment: 60 minutes)

##### **Engagement Platforms: Regional or State Meeting**

This treatment is, essentially, a first experience about first experiences. As such there are needs for logistical information, calendar coordination, introductions of key people, goal articulation, explanation of processes, and other important items. It is also a first learning experience. As such it will create a mental architecture and set of expectations that will shape the manner in which participants will engage in all subsequent experiences.

**EXERCISE:** Visual Synectics, Expression Cards, and Introductions

Materials needed: Expression Cards (Picture cards or playing cards could be used). Lay Expression Cards face up on table(s). Each participant will select a card that represents how they are currently feeling as they are entering this new position as an emerging leader. Then participants introduce themselves and share what position, what district, years in the district, and one personal piece of information about themselves in addition to how they are feeling.

**EXERCISE:** Kick-off Activities

- Introductions to state supervisor, association contacts, association offerings, etc. Role of mentor (see PowerPoint)
- Role of new school leader (see PowerPoint)
- Meeting dates, mentoring logs, etc. (see PowerPoint)

#### **Treatment 2: Principal Panel**

(approximate time allotment: 45 minutes)

##### **Engagement Platforms: Regional or State Meeting**

Using available mentors and experienced principals, assemble a panel of 3 – 5 individuals. The panel will make opening remarks and then respond to participant questions. These five general areas will be the focus of the interaction.

1. What not to do – pitfalls/lessons learned
2. First problem/challenge
3. The difference between legal and ethical decisions
4. Tap your resources
5. Understanding your politics
6. Committee Assignments
  - a. Current status of committees (Assessment of who is doing what)
  - b. Safety team
  - c. Building Leadership team
  - d. PLC
  - e. SW-PBS
  - f. Needs assessment- committees needed



## **EXERCISE:** Principal Panel Reflection. Engagement Platform: Regional Meeting

Participants share responses and reflections according to these prompts:

- A. Which problems and challenges, addressed by the panel, were most timely and valuable for you
- B. Based on the panel's contributions, in what areas have you increased your awareness of available resources?
- C. Identify a question or concern of yours that the panel did not address. How might you find more information on this issue?

### **Treatment 3: Gallery Walk on Critical Firsts**

(approximate time allotment: 30 minutes)

#### **Engagement Platform: Regional Meeting**

Materials needed: Chart paper, markers

List the topics below on Post-it chart paper, one per sheet. Place around room. Have the group number by fours and assemble around chart 1, 2, 3, and 4. Give a timeframe and have groups write on corresponding sheets – highlights, pitfalls, thoughts, ideas, challenges... about each topic. The contributions will reflect the prior learning experiences of the day. Rotate from chart to chart until the first group returns to their original chart. Have one spokesperson from each group share out “big ideas.”

Topics for Gallery Walk:

1. First communication with faculty and staff
  2. First faculty meeting
  3. First day of school
  4. Setting initial expectations for faculty and staff
- Exercise: Gallery Walk individual reflections

Each individual participant should take 10 minutes to re-walk the gallery and record their own personal best take-aways. Reflection prompts:

1. From which of the four topics did you gain the best ideas?
2. What was your single most valuable insight from the gallery walk activity?
3. What questions and concerns were not addressed in the gallery walk?
4. How might you use the gallery walk structure back at your home school?

### **Treatment 4: Leading and Facilitating Effective Meetings**

(approximate time allotment: 60 minutes)

#### **Engagement Platform: Regional Meeting**

#### **EXERCISE: Norm-Setting**

1. Participants are prompted to reflect on their experiences in attending meetings. Specifically, they are asked to think about those characteristics or behaviors of participants that promote productive meetings.
2. Facilitator introduces the concept of norms: definition, purpose and an introduction of how to use. This is very brief; however, it establishes purpose to the next steps.
3. Participants use an affinity diagram process to brainstorm and come to consensus on meeting norms.
  - A. Participants solo one desirable characteristic/behavior of meetings per post-it note.
  - B. Randomly spread notes on a large work surface so all notes are visible to everyone. The entire team gathers around the notes and participates in the next steps.
  - C. It is very important that no one talk during this step. Look for ideas that seem to be related



in some way. Place them side by side. Repeat until all notes are grouped. It's okay to have "loners" that don't seem to fit a group. It's all right to move a note someone else has already moved. If a note seems to belong in two groups, make a second note.

- D. When ideas are grouped, select a heading for each group. Look for a note in each grouping that captures the meaning of the group. Place it at the top of the group. If there is no such note, write one. Often it is useful to write or highlight this note in a different color.
4. Facilitator will introduce a consensus communication process referred to as Thumbs to arrive at consensus on individual norms.  
Thumbs up = I will fully support this norm.  
Thumbs sideways = I am not fully on board but will not sabotage what has been identified.  
Thumbs down = I am not in support of this norm. I have questions, etc.
  5. Each norm is processed via "Thumbs" and a master list of operating norms are developed.
  6. The developed list of norms will be published on chart paper or table tents and will be used during each future regional meeting. A next step would be to identify a process to use when norms are not being followed.
  7. As closure to the "norm-setting" activity, participants are prompted to have conversation with mentor or small group about how this norm-setting process could benefit their new staff during the upcoming school year. Share out.

### **EXERCISE: Effective vs. Ineffective Meetings**

1. Participants are mixed using a silent line-up technique. In groups of 4-5, and using a T-chart format, participants are asked to brainstorm (on the left) characteristics of "ineffective" meetings they have experienced in the past. On the right side of the chart, participants are to identify potential ways in which the identified characteristics could be proactively resolved by the meeting leader/facilitator.
2. Participants are provided an example meeting agenda to review and polish. Using the ideas for facilitating an effective meeting from the T-chart activity, participants are asked to highlight/insert, amend areas in which these ideas could be incorporated.
3. Participants report out a summary of their collective effort to other small groups in the room.

### **Treatment 5: Planning Time with Mentor**

(approximate time allotment: 60-90 minutes)

#### **Engagement Platform: Regional Meeting or One-to-One**

This Learning Experience concludes with an extended time for administrators and mentors to establish a positive working relationship, review the day's learning, and plan for success with upcoming critical firsts. This debriefing of firsts should also occur after each experience to reflect on how it went.

Topics for administrator-mentor debriefing time:

- Review checklist on Critical Firsts (see Mentor Toolbox)
- Plan for successful first communications with faculty and staff
- Review the calendar for ongoing learning
- Forward thinking about first meetings – being proactive
- First faculty meeting- agenda building
- First day of school
- First full week



# Missouri Leadership Development System (MLDS)

## Emerging Level Learning Experience 2:



Recognizing and developing excellent instruction: How successful school leaders cultivate strong instructional practices and develop an emphasis on skillful teaching through observation and feedback.

### Introduction and Rationale:

Stephen Fink in his study *School and District Leaders as Instructional Experts: What We Are Learning* (2012) noted that

*“The quality of teaching is the most important variable improving their instructional practice.”*

An administrator’s first essential step toward improving teaching is her ability to see, notice, and observe; in other words, to recognize excellent teaching. Dictionary.com provides these definitions of recognize: rek-uh g-nahyz (verb)

1. to identify as something or someone previously seen or known
2. to identify from knowledge of appearance or characteristics
3. to perceive as existing or true

When school leaders recognize excellent instruction, they are not seeing it for the first time. Rather, they are identifying episodes of excellent teaching by comparing them to what they have seen, learned, and experienced before. The act of recognizing, then, involves two parts. First the observer must have acquired and organized a knowledge/experience base that can be quickly and accurately accessed. Then, the observer must have the processing ability to interpret, in real time, what is being observed in light of the observer’s knowledge base. That’s Step 1: Acquire and organize a knowledge base about instruction; then Step 2: Use the knowledge base to filter current reality for what’s most important toward improvement.

One of the key differences between how experts and novices observe differently is that experts tend to notice meaningful patterns in the contextual field where novices tend to notice less connected details (Bransford, Brown, & Cocking, 2000). A casual observer looks up at the sky and sees clouds. A meteorologist sees patterns of cloud types that have meaning for forecasting weather.

In *How People Learn- Brain, Mind, Experience, and School* (Bransford et al., 2000) the authors note

Research shows that it is not simply general abilities, such as memory or intelligence, nor the use of general strategies that differentiate experts from novices. Instead, experts have acquired extensive knowledge that affects what they notice and how they organize, represent, and interpret information in their environment. This, in turn, affects their abilities to remember, reason, and solve problems. (p. 31)

As a school leader becomes more and more capable of recognizing excellent instruction, the next, complementary step is to be able to skillfully communicate that which is observed back to teachers in a manner that encourages growth and improvement (Costa and Garmston, 1994). Providing growth-evoking feedback and coaching to teachers is central to the role of school administrators, indeed to all management positions inside or outside education. Waldroop and Butler (1996) note “the goal of [feedback and] coaching is the goal of good management: to make the most of an organization’s valuable resources.” The awareness of how important feedback and coaching is for teachers increased significantly when researchers Joyce and Showers (1988) showed that skillful feedback and coaching can dramatically increase teachers’ application of new skills vs. staff development alone, that does not include a coaching component. The expectation that school administrators be instructional leaders in addition to their role as enterprise manager is now mainstream. Feedback and coaching skills are recognized as key components of that role. (Steiner and Kowal, 2007).



For emerging Missouri school administrators, the logic model is solid:

- A. Instructional quality is the prime mover of student achievement.
- B. Skillful administrators can learn to recognize patterns of excellent instruction.
- C. Adult learners can learn, grow, and develop substantially.
- D. Teachers apply new skills best when skillful feedback and coaching is employed.
- E. Administrators can improve their feedback and coaching skills through practice.

The learning experience, Recognizing and developing excellent instruction, seeks to develop administrators' abilities to:

- A. Observe classroom instruction actively and skillfully.
- B. Recognize and name specific patterns of excellent instruction using a common, professional language.
- C. Choose promising topics for feedback to optimize teacher growth.
- D. Provide episodes of growth-evoking feedback and coaching to teachers.
- E. Link individual teacher feedback to overall school instructional goals.

## MLDS Engagement Platforms and Treatments for LE 2

**Recognizing and developing excellent instruction:** How successful school leaders cultivate strong instructional practices and develop an emphasis on skillful teaching through observation and feedback.

### Treatment 1: Deming's Marble Drop Experiment

(approximate time allotment: 45 minutes)

#### Engagement Platforms: Regional Meeting, Retreat

(From the introduction/rationale...) When school leaders recognize excellent instruction, they are not, by definition, seeing it for the first time. Rather, they are identifying episodes of excellent teaching by comparing them to what they've seen, learned, and experienced before. *The act of recognizing, then, involves two parts. First the observer must have acquired and organized a knowledge/experience base that can be quickly and accurately accessed. Then, the observer must have the processing ability to interpret, in real time, what is being observed in light of the observer's knowledge base.*

That's Step 1: *Acquire and organize a knowledge base about instruction*; then Step 2: *Use the knowledge base to filter current reality for what's most important toward improvement.*

W. Edwards Deming, the influential thinker and organizational theorist often credited with inspiring the rise of Japanese industry after World War II, the resurgence of the American automobile industry in the 1980's, and the growth of statistical quality control and quality management, warned repeatedly about the tendency of managers to make decisions based on statistical analyses of processes that managers could measure but did not understand. Deming referred to this first part of the recognition process, the acquiring and organizing of one's knowledge base as **profound knowledge**-a necessary prerequisite to management action (Deming, 2013).

**EXERCISE:** Participate, with colleagues, in a reenactment of Deming's Marble Drop Experiment. (See appendix).

Use these discussion prompts to deepen and assess each participant's grasp of the concept of profound knowledge.



1. How do the results from the profound knowledge segment of the experiment compare to the measure and adjust segment of the experiment?
2. What is the essential lesson from the experiment?
3. Do you see any parallels from the experiment to educational management practice?
4. Why do you think Deming's marble drop experiment is a part of this learning experience on recognizing excellent instruction?

**Treatment 2: Brainstorm Lexicons And Taxonomies From Which One Can Build An Organized Knowledge Base (OKB)** (approximate time allotment: 30 minutes)  
**Engagement Platforms: Regional Meeting, Retreat, Learning lab**

*One way experts tend to organize their knowledge and experience base for fast retrieval is to create a lexicon of terms that can serve as an architecture for containing and organizing knowledge. Physicians speak and collaborate using a common scientific lexicon known and spoken by all physicians. Attorneys and airline pilots do the same thing. When a common scientific lexicon is used thinking is clearer, faster, and less prone to error (Rutherford, 2013). The common lexicon effect may be appropriated by educational thinkers too; and one does not have to invent a personal taxonomy to realize the benefits. There exist many comprehensive and research-based treatments of instructional practice that use a taxonomy of terms as a frame upon which a practitioner might build his understanding.*

The Center for Educational Leadership at the University of Washington has created a framework that includes five dimensions and thirteen sub-dimensions of teaching and learning (Fink, 2012). Charlotte Danielson's popular *Framework for Teaching* consists of 4 domains, 22 components, and 76 elements (Danielson, 2007). John Hattie has organized 138 teaching/learning influences by their effect sizes on student achievement (Hattie, 2009). Robert Marzano, D.J. Pickering, and J.E. Pollock in their 2001 book *Classroom Instruction That Works* offer a taxonomy of nine strategies that represent the most effective attributes of teaching (Marzano, 2001, 2007). Douglas Lemov in his book *Teach Like a Champion* details 49 techniques for "putting students on a path to college" (Lemov, 2010). Dave Burgess in *Teach Like a Pirate* provides readers with 32 hooks that increase student engagement (Burgess, 2012). *In The Artisan Teacher: A Field Guide to Skillful Teaching*, Mike Rutherford provides 23 themes of skillful instruction (Rutherford, 2013).

The list above is certainly not exhaustive, and is only provided as a starter list to the many approaches to organizing the body of knowledge that exists about excellent instruction. The case is clear, however. Instructional leaders that seek to better recognize excellent instruction do well to have a mental structure on which to organize their ever-growing knowledge base.

This mental structure need not be original and need not be a pure iteration of any one author/expert's framework. To enhance the recognition of excellent instruction, the framework must serve to deepen and organize an observer's body of instructional knowledge. To enhance collaboration, feedback, and improvement, it is helpful if the framework is shared among teachers, administrators, and administrator supervisors.

**EXERCISE:** Post large format paper (several flip chart pages), Label the display "lexicons/frameworks for recognizing excellent instruction." (Or similar). Review the basics of brainstorming- fast, no judgements, no stories, don't worry about redundancy, etc. Ask 2 participants to chart as the group brainstorms. Start with the lexicons from the treatment overview, above.

Post brainstorms so the group can view them as they participate in the next treatment.



### **Treatment 3: Build a Graphic Organizer for your Knowledge/Experience Base with Recognizing Excellent Instruction**

(approximate time allotment: 30 minutes)

**Engagement Platforms: Regional Meeting, Retreat, Learning lab**

..... “Experts are able to flexibly retrieve important aspects of their knowledge with little attentional effort.” (Bransford, et al, 2000, p. 31) It appears that more expert classroom observers not only know more about instruction than novice observers, but, more importantly, they have their knowledge base better organized for faster, easier access.

**EXERCISE:** Distribute large format paper (11" x 17") markers, and hi-lighters. Create a graphic organizer that represents your own, personal organization of your knowledge base on recognizing excellent instruction. This will not be a finished product on the first pass and there are no bonus points for artistic talent.

Organize into groups of 3 and share (talk through) your illustrations.

Place all the illustrations face-up on tables. Do a quick “carousel” - all walk around the room and notice how each participant illustrated their OKB (Organized Knowledge Base).

**Treatment 4: Group Discussion:** Do we know what we see or see what we know?

(approximate time allotment: 30 minutes)

**Engagement Platforms: Regional Meeting, Retreat, Learning Lab.**

**EXERCISE:** Read and highlight important portions of the following short essay: **A common language not only organizes, but also alters thinking.**

As classroom observers, do we know what we see or do we see what we know? There is compelling evidence that our language (what we call something) strongly impacts our thinking (what we notice) (Mitterer, et al, 2009, Klemfuss, et al, 2012) (Vygotski, 1986). Studies have demonstrated that teaching people new color words changes how people are able to discriminate colors. (Boroditsky, 2011, p. 65). A common human occurrence is learning a new word and then noticing that word several times in the days following. How does that work?

Does the universe intentionally show us the new word right after we learn it? Or, has the word been around us all along and we are just now seeing it because we now know it exists? The latter explanation, of course, is true. We didn't notice the word until we knew it. So the language we choose to describe an element of excellent instruction not only helps us organize our thinking, **it determines what we notice during a classroom observation.**

Discussion prompts:

1. Provide some specific examples of how your OKB influences what you notice in a classroom.
2. Agree or disagree and defend your stance... “Having a well-defined and easily recalled OKB can sometimes limit what I notice in a classroom.”

**Treatment 5: Close Read: Essay on Cause and Effect**

(approximate time allotment: 30 minutes)

**Engagement Platforms: Regional meeting, retreat, Learning Lab**

**EXERCISE:** Read the short essay: *Using cause & effect to deepen classroom observation and improve feedback.* Read the essay once through, then a second time with hi-lighter in hand to mark key ideas.



## Essay: Using cause & effect to deepen classroom observation and improve feedback.

Specific feedback is more memorable, valuable, and impactful than general feedback. The advice columnist Ann Landers advised her readers that to make a compliment more meaningful and memorable one must make it specific. *“That sweater has an eye catching texture and it really matches your scarf”* is a much more memorable compliment than *“nice sweater.”* *“Good meeting today”* is not nearly as meaningful as *“The way you invited everyone to speak, but didn’t allow anyone to dominate the discussion really made for a productive meeting today.”* Hear the difference? Classroom observers do well to follow Landers’ advice. *“Smooth transition today”* is not nearly as meaningful and memorable as *“You took the time to teach the steps to the transition today and check for understanding before you asked the students to move. Because of that, they were able to get right to work with no wasted time.”*

Specific feedback can only follow specific observation. One way to enhance specificity is to observe classroom happenings using the frame of cause-effect. Things the teacher does, says, designs, or allows can be viewed as causes. Effects can be thought of as the resulting impact on learners and/or learning. A simple cause-effect expression might sound like this: *“When the teacher asked all students to count by threes out loud and all together (choral response), the energy level in the classroom increased.”* Or, *“When the teacher asked students to use a Venn diagram to compare and contrast fiction and non-fiction, students confused these two types of writing less often.”*

It is also important to note that any one cause can be linked to several observable effects. For example, a teacher might ask students to use their personal white boards to solve a math problem; then, at the “show me” signal, hold their boards high so the teacher can see all the responses. This single cause can have multiple effects. An observer might note that the energy level in the classroom increased, and that the engagement level of the students increased, and that the information available for formative assessment was more plentiful, and that off-task behaviors decreased. In this case a single cause produced four observable effects.

Cause-effect is a useful frame for enhancing specificity in an observation, but it should be used with care. Observing and expressing classroom cause-effects is an inexact science at best. The web of causes and effects in any classroom is complex, interwoven, and dynamic. Effects are often hidden, subtle and/or delayed in time and space. We overreach when we declare with too much confidence that any particular cause was solely responsible for any particular effect. Still, it is worth the effort to observe carefully and attempt to uncover the connections between specific teaching actions and specific effects on the learning and learners.

A helpful analogy can be found in the way investment experts attempt to analyze the stock market. A financial analyst might hypothesize that company A’s stock increased in value as a result of rumors that it may merge with company B. The analyst sees and expresses cause and effect. The cause is merger rumors. The effect is a rising stock price. It is likely not that simple. The stock market is incredibly complex. Each day’s final results are a function of millions of buy/sell orders from millions of investors across multiple time zones. To say with absolute certainty that one event caused one response in the market is to grossly oversimplify reality. Since the stock market is important to the economy, and individual fortunes can be quickly lost or gained based on its fluctuations, analysts don’t simply throw up their hands and say “It’s too complicated.” Rather, they do the best they can, recognizing the complexity, but still identifying likely causes and possible effects.

So it is with classroom observations. We seek to see cause and effect because what happens in classrooms is too important for us to simply throw up our hands and declare “It’s too complicated.” Rather, we consider the complexity, and still seek out important relationships between teaching actions and learning results. A skillful classroom observer might say *“when the teacher quickly circulated through the classroom to check on student work, the sense of accountability in the room increased.”* It’s easy to spot the cause and effect in this expression. Can you also spot the respect for complexity? The observer doesn’t claim to see the entire web of causes and effects, or to understand the entire range and degree



of all the effects. The observer simply expresses a likely relationship. When one thing happened, another thing increased or decreased in value- like a stock price. Classrooms and stock markets are both complex. To profit, one need not account for all the complexity. It's enough to see and appreciate the general direction of the effects.

**EXERCISE:** Small group discussion + large group share out

Elaborate on your personal responses to the following excerpts from the essay.

- A. "Specific feedback is more memorable, valuable, and impactful than general feedback."(Paragraph 1)
- B. "It is also important to note that any one cause can be linked to several observable effects." (Paragraph 3)
- C. "We overreach when we declare with too much confidence that any particular cause was solely responsible for any particular effect." (Paragraph 4)
- D. "Classrooms and stock markets are both complex. To profit, one need not account for all the complexity. It's enough to see and appreciate the general direction of the effects." (Paragraph 6)
- E. Use another portion of the essay text of your choosing.

### **Treatment 6: Picture Studies: Using Classroom Images to Practice the Identification of Cause and Effect**

(approximate time allotment: 45 minutes)

**Engagement Platforms: Regional meeting, Retreat, Learning Lab, Online event.**

**EXERCISE:** Assemble the group so that everyone has easy viewing of the screen; or access the images on personal devices. Distribute Cause & Effect T-charts to all participants.

Project a series of classroom images depicting various instructional practices. For each image, respond to these prompts:

- a. Make some notes on the T-chart regarding any cause – effect relationships that can be inferred from the image.
- b. Remember that each cause can have multiple effects
- c. use ↑ and ↓ arrows to show which effects are increasing and decreasing
- d. It is not necessary to label the cause & effect pairs yet (for example, calling a C&E pair "informal assessment" or "differentiation").
- e. Share analyses. Make a group T-chart to keep track of participant input.
- f. Choose and share which cause & effect pairs are most illustrative of excellent instruction. Elaborate on these choices.

### **Treatment 7: 7 Principles of Active Observation**

(approximate time allotment: 45 minutes)

**Engagement Platforms: Regional Meeting, Learning Lab, Coaching and Mentoring**

As school administrators become more engaged in providing feedback and coaching to teachers, it is important to also continue to develop observations skills. The two skillsets are complementary- more skillful observation supports more meaningful feedback. To practice active observation is to learn to gather more valuable insights in less time—to be both more effective and more efficient.

**EXERCISE:** Participate in a close read + group discussion of the article: *7 principles of active observation*. Read the article through once for consideration. Then, with highlighter in hand, mark particular passages that were particularly interesting, valuable, or meaningful. Share your marked passages, and your reasons for marking them, with a small group. Next, assess your current practice against the seven principles, marking your current level of practice as strong, moderate, or weak for each of the seven principles.



## 7 Principles of Active Observation

Great teacher developers are first great observers. They enjoy being in and around classrooms and know their way around once inside. They see more, understand more, probe more, focus more, and move around more. They pose more questions, test more hypotheses, and collect more artifacts. In essence, they gain more useful information per minute of observation than other observers. Based on observations of thousands of classrooms and observers, here is a set of principles that can guide toward more active and skillful observation. Principles are not laws and therefore should sometimes be ignored. They are stronger than suggestions, however, and are offered as a set of guidelines for making the most of every minute of classroom observation time.

### Principles of active observation:

- 1. Stay on your feet.** Except for occasionally sitting next to students to see their work more clearly, observers strike a better vantage point by standing up. There are many advantages to standing. The line of sight is better to see more student work. Once standing, moving is easier and less obtrusive. Moving around the classroom provides the observer with different angles and observation opportunities. Standing is a more active body position than sitting, so there is more energy available for observing. Observations are typically shorter and more productive when the observer remains standing.
- 2. Don't worry too much about interrupting the action.** As soon as an observer enters a classroom environment, it has been interrupted. Observing anything alters, if only slightly, the thing that is being observed. Too often, observers attempt to be a fly on the wall or say "just pretend I'm not here." Of course, one should avoid affecting the teacher's intentions or distracting students while they are engaging in important work. Beyond this, however, observers do well to embrace the fact that they are now a part of the action and not an inert observer behind a one-way glass.
- 3. Delay the focus on details.** An observer's first instinct is to follow the action and immediately begin noticing details about what the teacher or students are doing. It is beneficial to resist this urge and, instead, take some time to orient oneself to the classroom's physical and social environment. An observer who first notices the contextual field of the classroom will be able to make more meaningful and insightful observations of the actions and details that follow. To this end, allow two or three minutes at the beginning of an observation to let the classroom climate and environment become more apparent. If taking notes, don't write anything down for a few moments. Walk around the classroom and try to take it all in; what is on the walls, on the board, on posters, on the screen? Get a sense of the energy flow in the classroom. How engaged are students? How energetic is the teacher? How are people interacting with one another? How are students interacting with learning materials? How is the seating arranged? Mentally generate a few descriptive words that illustrate the gestalt of the classroom... active, self-directed, high-energy, organized, intentional, warm, safe, etc.
- 4. Enter as a visitor, not an owner.** Administrators certainly have the authority to enter into and out of classrooms at any time, with or without permission or warning. However, it is best not to overtly claim this right. The most skillful observers treat each teacher's classroom as sacred ground. They understand that the classroom space is a home away from home for students and their teacher. They enter with respect, courtesy, and humility. It is a nice touch to make eye contact with the teacher upon entering the classroom and, at an appropriate time, say something like "Thanks for having me in for a few moments." It is also important to make contact with the teacher as one leaves the classroom. A simple "thank you," thumbs up, or "I enjoyed watching you and your students work today." sends a message of professional respect. Even as one observes students at work, it is a kind gesture to ask "May I listen in for a moment? Or, "Do you mind if I watch you work that problem?" Most teachers create a personal space on and around their desk area where they may display family photos, keep their plan book, and store other personal items. The best observational etiquette is to stay away from this area, except to quickly leave a note of thanks or a bit of positive feedback.



- 5. Maintain focus and intensity.** Observing skillfully is not watching someone else work. It is work! Even ten or fifteen minutes of active observation can be exhausting, as observers look, listen, move, question, jot notes, draw sketches, search for clues, and gather artifacts to enhance feedback. It is affirming to teachers to have someone engage intensely and substantially in the observation process. When observers are seen to be working intensely on the teacher's behalf, and have substantial notes, artifacts, and insights ready to share, it adds credibility to the feedback or coaching session that may follow. Some practical suggestions: Don't multi-task. Teachers are great at sneaking a peek at the observer. It sends the wrong message if the observer is caught daydreaming, or checking phone messages or e-mail. Also, be intentional concerning non-verbal behavior. Communication experts say that as much as 70% of the content of a message is communicated non-verbally. An observer's posture, facial expression, eye contact, gestures, movement, and position communicate the observer's internal state to the teacher. Since observers usually can't converse with teachers during an observation, non-verbal communication becomes more important. Observers do well to stand upright, look alive, smile, laugh, appear curious, and be seen enjoying the process.
- 6. Observe both field and ground.** Human attention is analogous to a camera with two lenses. The wide angle lens observes the field, the big picture, the macro events, and the gestalt of the classroom. The telephoto lens captures the ground, the details, the fleeting looks and expressions, and the individual responses. Most novice observers focus their attention somewhere in the middle, neither wide enough to capture the big picture nor narrow enough to appreciate the details. An accomplished photographer often cycles between wide angle—to survey the field, and telephoto—to emphasize the interesting detail. This cycling between field and ground is an effective way to capture the action of a classroom. During a fifteen-minute observation, a skilled observer might scan the field three or four times, each time choosing a different element of the ground on which to focus intently to capture the small details that often lead to valuable insights. In this type of observation, where the observer is searching for meaningful insights to share back with the teacher, it is important to take the time to drill down for a while into a single student's actions, reactions, or non-verbal cues, to look carefully at students' work, not fleetingly. It is important to look expectantly for insights revealed as fine details, subtle patterns, or hidden clues. An often productive technique is to look away from the action and past the obvious. For example, one might watch a single student while the teacher is talking to find clues to indicate the level of engagement and understanding. Or, as the teacher circulates throughout the classroom, one might observe the group of students the teacher just left, instead of always following the teacher's direct action. This might uncover valuable insights to share with the teacher on the residual effects of her circulation
- 7. Practice frequent, short duration observations.** Unless required by law or policy, keep most observations relatively short. Ten to twenty minutes is plenty of time to collect many more artifacts and insights than one could possibly share with the teacher. Remember that, in an observation, duration and intensity are inversely related. So, observers are able to keep a higher energy level and greater observational focus throughout a shorter session than a longer one. Shorter observations also create the possibility for more frequent observations. Schools whose teachers report more frequent observations tend to have a more positive, professional culture and administrators in these schools are seen as more credible instructional leaders.

## **Treatment 8: Feedback & Coaching Lab, Session 1: 30 Second Feedback**

(approximate time allotment: 3 hours)

### **Engagement Platforms: Learning Lab**

Feedback & Coaching Lab is a facilitated half-day experience that assembles 12-15 participants at a volunteer school for the purpose of developing observation and feedback skills through direct modeling, practice, and immediate feedback. Feedback & Coaching Lab participants observe classroom teaching in small groups, practice collecting relevant data, analyze and discuss observations to clarify patterns of effective instruction, identify teacher talents and strengths, and provide teachers with growth-evoking feedback and coaching.

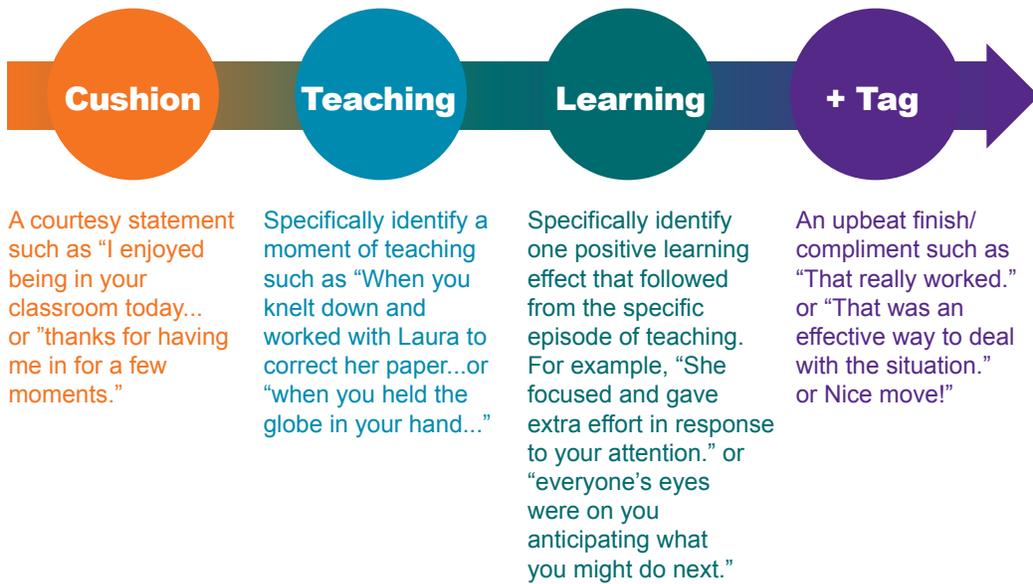


**30 Second Feedback:** 30 second feedback seeks to deliver a short, but meaningful, bit of positive reinforcement based on a walk-through or short observation. This tool's effectiveness is based on the observer's ability to be specific in describing the short episode of teaching and the subsequent learning effect. 30 second feedback is often delivered in an informal fashion– in the hallway, on the way to the cafeteria, etc.

**Intended Effect:** 30 second feedback serves as a quick affirmation of a specific aspect of a teacher's practice. It is a professional compliment, of sorts. It focuses attention on a specific episode of productive cause-effect, positively reinforcing that practice.

Use 30 second feedback to reinforce productive practices only, not for critique or correction. 30 second feedback is too brief to be effective as a means of changing practice, but is effective at reinforcing already productive practices. 30 Second Feedback is also effective when provided in written form.

**A structure for providing 30 Second Feedback:**



**Technique Tips for 30 Second Feedback:**

1. Place a pause between step 2 (Teaching) and step 3 (Learning). The feedback provider knows when this transition is coming, but the teacher does not. This will signal the teacher that you are now transitioning from your description of the teaching (Cause) to the effects on the learners and learning (effect.)
2. Make step 2 (Teaching) elaborate, descriptive, and detailed. Step 2 is the longest of the 4 steps. Take time to describe the teacher's actions with as much specificity as possible. It is quite affirming to hear one's teaching described specifically and in detail by an able and interested observer.
3. Make step 3 (Learning) short, singular, and memorable... The description of the learning effects should be brief and to the point so that it will be memorable. There will always be multiple effects that are associated with a single teaching episode. Choose one effect and describe it in a memorable fashion.
4. Mix up your cushion statements and positive tags. This way your feedback will not sound formulaic. You need not worry about steps 2 and 3 as they will always vary with the teaching episode.
5. Avoid phrases such as "I liked when..." or, "I was impressed by..." This takes the focus off the learner effects and places it on the observer effects. It is the teacher's job to be effective with the learners, not to please observers. It's better to say "It worked great when you..." or, "Your students really benefitted from..."



6. Reinforce your message with positive non-verbal behaviors. Up to 70% of the content of a message is communicated outside the actual spoken words. Use eye contact, facial expression, following comments, posture, and gestures to reinforce your spoken message. Bonus points: Be enthusiastic!
7. Speak in plain-spoken English so that even a non-educator could understand. Avoid jargon, acronyms, or any terms learned in graduate school. Aim to be clear, not smart.
8. Don't skimp on step 4, the positive tag. The teacher has demonstrated a specific exemplary skill. Provide a memorable, professional compliment fitting for the occasion.
9. Be brief and not redundant. Saying something once, with careful emphasis, is more memorable than repeating the same information in different ways.
10. Speak conversationally and don't worry much about being smooth and articulate. No bonus points for sounding like a news anchor- be real, convey authentic emotion, speak as you think, don't try to impress.

### **Treatment 9: Feedback & Coaching Lab, Session 2: Craft Conversations**

(approximate time allotment: 3 hours)

#### **Engagement Platforms: Learning Lab**

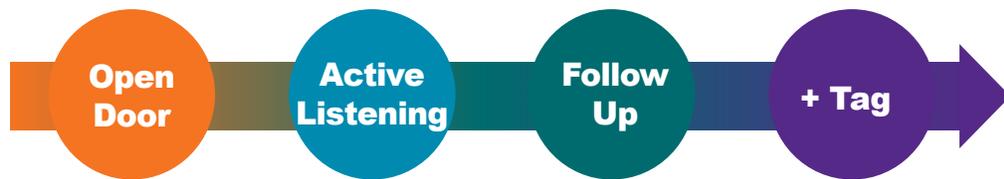
Feedback & Coaching Lab is a facilitated half-day experience that assembles 12-15 participants at a volunteer school for the purpose of developing observation and feedback skills through direct modeling, practice, and immediate feedback. Feedback & Coaching Lab participants observe classroom teaching in small groups, practice collecting relevant data, analyze and discuss observations to clarify patterns of effective instruction, identify teacher talents and strengths, and provide teachers with growth-evoking feedback and coaching.

**A craft conversation.** A craft conversation is a quick dialog about a specific, successful aspect of a teacher's work. It should not seem supervisory, judgmental, corrective, or evaluative.

Rather, a craft conversation should look and sound like two enthusiasts talking about something in which they share a keen interest. It is "shop talk." In a craft conversation the common ground between the teacher and administrator is their mutual interest in skillful teaching and successful learning. The administrator takes the position of a curious, interested colleague who wants to learn more about an aspect of the teacher's craft.



## A structure for Craft conversations:



An enthusiastic invitation for the teacher to elaborate on an episode of particularly effective teaching.

*"I noticed that \_\_\_\_\_ was working very well for you today. Talk a little about how that works."*

or

*"I noticed \_\_\_\_\_ . Talk about why that's important for..."*

Listen to the teacher's responses. Consciously send verbal and nonverbal signals that you are listening, interested, following, curious, and tuned in.

Choose one aspect of the teacher's response and invite the teacher to tell you more, go deeper, and elaborate further.

*"Oh, I get it...you were actually listening to their verb choices. Of all your students, who did a particularly good job today?"*

Follow-up on a second aspect of the teachers response. Or continue to follow-up on the first aspect.

Note: Follow-up topics should tie to the teacher's responses and not take the conversation in a new direction.

An upbeat finish—a professional compliment.  
*"Congratulations, \_\_\_\_\_ worked really well today."*

or

*"Your students benefitted greatly today because of \_\_\_\_\_. I recommend you continue to use that strategy."*

### Four attributes of an effective craft conversation:

1. **Brief.** A CC respects the teacher's and administrator's time— two minutes or so.
2. **Positive.** A CC revolves around an episode of effective/successful teaching.
3. **Enthusiastic.** The energy level of a CC is two steps higher than a casual conversation.
4. **Curious.** The administrator seems motivated by curiosity, appreciation, and learning, not supervision.

Craft conversations, when routinely provided, cause teacher reflection on effective practices, establish positive and professional communication norms between teachers and administrators, and add to administrators' organized knowledge base on effective teaching.

### Treatment 10: School Walk Around (SWA)

(approximate time allotment: 90 minutes)

(Ideally a SWA is performed three times throughout the school year; early (September/October), mid-year (January/February), and toward the end (April/May).)

#### Engagement Platforms: Coaching and Mentoring.

The explanation and agenda for a School Walk-Around that follows is written from the perspective of the facilitator (coach or mentor). Administrators who engage in this treatment will, after reading through how and why the facilitator structures the SWA, benefit from knowing how the process works. An administrator can't really prepare for a SWA, since it involves mostly extemporaneous conversation, but an administrator can increase the benefits of a SWA by being a knowledgeable co-participant with the facilitator. The School Walk-Around (SWA) process seeks to provide administrators with an authentic and insightful assessment of their instructional leadership skills. It focuses on revealing, through observing and talking, the administrator's personal understanding of the instructional strengths and needs of individual faculty members and the faculty as a whole.



In essence, a SWA is an hour-long walking/talking tour of the school with a 30-minute debriefing meeting at the end. A typical SWA process can be accomplished in approximately 90 minutes. The first 60 minutes are spent in the assessment phase (the actual school walk-around) and the final 30 minutes are spent in the reporting/debriefing session.

Key participants include the SWA facilitator (a coach or mentor, perhaps) and the school principal. Others can and should join the process depending on the specific characteristics of the setting. Members of the school's administrative team can join the process and/or members of the school's broader leadership community to include key teachers, instructional coaches, or others who share the role/function of instructional leadership at the school. Others who share the responsibility of developing instructional leadership may also join the SWA facilitator as a co-facilitator or as part of a facilitation team. As the SWA process is described, we will continue to refer to the SWA facilitator and principal as the primary participants. Remember that others can and should join in both the walk-around and the debriefing sessions that follows.

The tour begins near the front door of the school. Here the SWA facilitator asks the principal to elaborate on the faculty as a whole- talents, strengths, needs, liabilities, experience level, openness to coaching and feedback, past professional learning experiences, attitude, culture, past experiences, college preparation, etc. The SWA facilitator also asks the principal to describe his/her journey, experiences, talents, etc.

The SWA facilitator and the principal then begin to slowly walk up and down each hallway of the school. The SWA facilitator engages the principal in an ongoing conversation about the instructional strengths, needs, and development plans for each individual teacher as they stop outside each classroom. For large faculties, a sampling of teachers (perhaps every third or fourth classroom) can be used. Mostly, the discussions happen in the hallway, outside each teacher's classroom. Occasionally (perhaps 5-8 times in a 60 minute SWA), the facilitator and principal step into a classroom to observe instruction for a brief period (2-5 minutes). After each mini-observation, the facilitator asks the principal what effective practices were noticed in the observation, what the teacher's key talents and strengths are, what areas need improvement, and how the teacher might be best developed. The SWA facilitator might ask the principal to identify a teacher in each grade level, team, or department that they believe to be extraordinarily effective. As these teachers are observed the facilitator will ask the principal to talk about why/how these particular teachers are so effective. The facilitator might also ask the principal to identify weak performers in each grade, team or department and observe/discuss the reasons for these teachers' difficulties. Similarly, the facilitator might ask the principal to observe the most experienced and/or the most novice teachers in each grade, team, or department.

Specific assessment "look-fors" and "listen-fors" for the SWA facilitator(s):

#### **In the initial talk at the school's front door:**

Listen for how the principal depicts the faculty's collective talents, strengths, and liabilities. Are his/her comments mostly general or specific?, mostly about instruction or management?, mostly optimistic or negative? Does he/she see patterns and trends or speak mostly of outliers and individuals? How does he/she describe the effects of past professional development efforts? How does he/she describe the faculty's openness to feedback and coaching? Does the principal seem to "own" these characteristics or just "lament" them? How does he/she describe their personal journey? What do they say are their own strengths and weaknesses? Overall, does the principal see the entire faculty as basically talented and developable- or as basically unskilled and hard to develop? Overall, does the principal describe the faculty's attitude toward feedback and coaching as basically positive or as generally negative? Finally, does the principal speak as someone who has the knowledge and ability to change/improve/develop the faculty or as someone who is a victim of circumstances?



### **As the principal walks through the school:**

Does the principal talk about the school through the lens of a physical plant (paint, maintenance, landscaping, technology, furniture) or through the lens of a human resource organization (people, talents, strengths, experiences, accomplishments) or through the lens of organizational design (schedules, programs, approaches, initiatives)? Or another lens...?

### **As the principal interacts with people during the SWA:**

In a 60 minute walk-around, it is common for the principal to run into several people/situations. Watch how the principal interacts with different audiences- teachers, classified staff, students, parents, others. To which group does the principal pay the most attention? With which group is the principal most at ease?

### **As the principal enters each classroom:**

Does he/she look comfortable- like this is a common activity for them? How does the teacher react or respond to the principal's (and the facilitator's) presence in the classroom? Is there a greeting?, eye contact? Does the principal move easily and freely around the space? Does the principal interact with students while in the classroom? Does the principal interact with the teacher in any way? Watch the exit... is there a "thank you" or any communication with the teacher?

### **As the principal observes in each classroom:**

Follow the principal's eyes and movement. What do they notice? Where do they stand? Do they sit? Do they check their phone? Do they turn off their walkie-talkie or other communication devices? Are they comfortable talking quietly about what is happening in the classroom? Is the principal most concerned with the physical aspects of the classroom, the instructional practices, the classroom environment, or classroom management issues?

### **As the principal describes each teacher's key talents and strengths:**

Listen carefully for depth... does the principal speak of the teacher's talents as mostly affective (tone, likeability, respect from students, positive relationships) or as mostly organizational (well planned, prepared, routines, procedures, management) or as mostly instructional (instructional techniques, practices, and approaches)? Does the principal differentiate between natural, innate talents and learned skills?

### **As the principal describes each teacher's key weaknesses:**

Listen again for depth... does the principal describe the teacher's key weaknesses as mostly in the affective, organizational, or instructional domain? Are they in the areas of content knowledge, teaching technique, or relationship building? Does the principal speak of the weaknesses as permanent or developable? Does the principal describe what he/she has done or is doing to address the issue?

### **As the principal describes how each teacher might be best developed:**

Does the principal speak first of building on the teacher's talent areas or of correcting an issue or problem? Does the principal speak of feedback and coaching as a way to develop the teacher? Does the principal speak of what he/she has done or is doing to develop the teacher?

### **As the principal describes his/her most effective teachers:**

Listen for the principal's attribution theory. To what does he/she attribute the teacher's effectiveness (relationships, content knowledge, teaching technique, good attitude, dependability, infrequent problems sent to the office)? Ask "how might you help this teacher get even better?" Listen for the principal's first reaction to this question. Is he/she surprised by it (as if to say "this teacher is already good- no need



to spend time/effort here)? Does the principal have a ready answer (able to speak to it in just a few seconds as if recalling it, not creating it on the spot).

As the principal describes his/her least effective teachers: Listen again for the attribution of effectiveness (or lack of effectiveness). Does the principal speak of the weaknesses as mostly innate and unchangeable (attitude, intelligence, ability to get along) or as mostly addressable through coaching, practicing, or adjusting the setting?

**The debriefing/reporting meeting:** After the SWA, the facilitator and principal retreat to the principal's office or conference area for discussion, debriefing, and reporting. If others were present for the SWA, they can/should be invited to the debriefing also.

#### **Agenda for SWA debriefing meeting:**

1. The SWA facilitator should restate the purpose/rationale of the SWA.  
The School Walk-Around (SWA) process seeks to provide administrators with an authentic and insightful assessment of their instructional leadership skills. It focuses on revealing, through observing and talking, the administrator's personal understanding of the instructional strengths and needs of individual faculty members and the faculty as a whole.
2. The SWA facilitator should then report back to the principal (or group) an essence/summary of what was heard in response to the SWA questions. It is not necessary to report back on each and every question from the SWA, but only on the ones that the facilitator thinks were particularly revealing or indicative of the principal's instructional leadership skills and approach. For example, the SWA facilitator might say "After we observed some very effective 4th grade teachers, I asked you to describe the reasons for their effectiveness. You replied that they were great at building positive relationships with students and kept the classroom interesting with fun activities." This was a common theme as we talked about your best 3rd and 2nd grade teachers as well. You added that they were also very knowledgeable about the students' home lives and difficult situations."
3. The SWA facilitator should share their interpretations of the principal's responses. For example, the SWA facilitator might say "From these responses, it seems that you readily see teachers' abilities to build positive relationships with students." Or "As I listened to you talk about the faculty's attitude toward receiving feedback and coaching, it is evident to me that you see that as an important growth area for the school and that you have some good ideas about how to improve in that area."
4. The SWA facilitator should share suggestions (2 or 3) for improvement/development of the principal's instructional leadership skills and practices. The SWA facilitator might say "Based on our conversations, I'd like to suggest that as you visit your most talented teachers' classrooms, you practice identifying (in addition to the teacher's relationship skills) specific instructional skills and patterns that contribute to the teacher's success. The ability to build positive relationships is important and a key to success. You're already adept at seeing this. Practice noticing other elements of success such as the teacher's specific instructional techniques."
5. The SWA facilitator could, optionally, follow with a written report that repeats and elaborates on the key findings from the SWA.



# Missouri Leadership Development System (MLDS)



## Emerging Level Learning Experience 3:

Understanding Self and Others: How successful administrators cultivate self-knowledge and customer focus to create success for all stakeholders.

### Introduction and Rationale:

Of all the traits that quickly come to mind when one imagines a particularly successful leader...courage, vision, commitment, integrity, service- rarely do we place on the A list the trait of honest self-awareness. An insatiable curiosity about the nature of those one purports to lead, likewise, does not make the top ten. These two leadership attributes, however, are directly and tightly linked to success in all enterprises, inside and outside education. The degree to which a school administrator knows well both self and others is the degree to which the administrator is able to design and act for success- both personal and organizational.

In their work *Heart, Smarts, Guts, and Luck* (Tjan, Harrington, and Hsieh, 2012) Tjan states “In my experience — and in the research my co-authors and I did for our book, *Heart, Smarts, Guts, and Luck* — there is one quality that trumps all, evident in virtually every great entrepreneur, manager, and leader. That quality is self-awareness. The best thing leaders can do to improve their effectiveness is to become more aware of what motivates them and their decision-making.”

A logical complement to self-knowledge is the leader’s knowledge of others, customers and coworkers. The best in the business not only study their customers, they have a persistent curiosity and keen fascination with all aspects of their customers’ habits, motivations, home life, relationships, fears, goals, and preferences.

A focus on understanding self and others is the basis for creating a culture of trust (Hurley, 2006). When school administrators spend a great amount of time and energy learning about and studying others, they are rightly perceived as being other-focused, rather than purely self- focused (Russell, 2013). The often quoted observation by former president Teddy Roosevelt “Nobody cares how much you know, until they know how much you care” rings especially true for school administrators. Andrew (2015) explains “When people know how much you care, you have begun building the foundations of trust-based relationships. In business, developing and sustaining relationships based on trust puts you on the track to success, as relationships, particularly trust-based relationships, equal success” (para. 2).

One of the keys of being a successful leader is the ability to build and develop relationships of trust with pertinent stakeholders (Covey, 2006). From the students you serve to the colleagues with whom you collaborate and the community members with whom you engage, creating and sustaining relationships is essential

The learning experience Understanding Self and Others builds administrators’ abilities to:

- A. Develop a deeper and more nuanced understanding of self, including one’s motivations, talents, weaknesses, preferences, personality, values, purpose, temperament, and tendencies.
- B. Discern how the complementary elements of mission, vision, and core values can create clarity of purpose for self and school.
- C. Use capacity mapping to build awareness of the unique and valuable skills and abilities possessed by the current faculty and staff.



- D. Develop a deeper understanding of students by connecting their school and home contexts.
- E. Build and sustain positive, trusting relationships with stakeholders and stakeholder groups.

### MLDS Engagement Platforms and Treatments for LE 3

Understanding Self and Others: How successful administrators cultivate self- knowledge and customer focus to create success for all stakeholders.

#### Treatment 1: Build a Personal Leadership Platform

(approximate time allotment: 75 minutes)

#### Engagement Platforms: Regional Meetings, Coaching and Mentoring

*Know Thyself* is an ancient bit of wisdom claimed by many traditions. This famous Greek maxim is attributed to any number of ancient Greek philosophers, including Socrates. More recently, Daniel Goleman, in his best seller *Emotional Intelligence*, maintains that the first and foundational tenet of emotional intelligence is self-awareness (Goleman, 1995). In his book, *Frames of Mind*, Howard Gardner identifies intelligence as having multiple measures including both interpersonal and intrapersonal components (Gardner, 1983). Mihaly Csikszentmihalyi, in his book *FLOW, The Psychology of Optimal Experience*, shows that people with exceptional personal awareness report being much happier and satisfied with their life and work (Sikszentmihalyi, 1990).

The foundational prerequisite for all leadership effectiveness is self-knowledge. It seems that leaders who first take the time to understand themselves are better able to understand others and lead them effectively. A **Personal Leadership Platform (PLP)** is a self-knowledge tool that organizes a leader's personal values, mission, style, personality, and experiences into a cogent expression of self that provides a foundation upon which leaders can engage their school and community. A PLP is patterned from a platform that a skilled carpenter might build. It contains foundation joists and platform planks that, when skillfully built, provides a sturdy, elevated platform from which one can survey the surroundings. A PLP is also analogous to a political platform, where a person or party makes explicit, for self and others, their beliefs, values, and intentions.

#### EXERCISE: Design a Personal Leadership Platform

A PLP contains two foundation planks (like floor joists) and 6-8 platform planks (floorboards—laid across the foundation planks). A PLP can be constructed in the abstract, by diagramming it on paper, or a miniature version can be constructed of popsicle sticks, tongue depressors, or similar materials. Here's the blueprint:

#### Foundation Plank: Personal Mission Statement

A personal mission statement is a written expression of a life's overarching and long-term purpose. The process of choosing nouns, verbs, and modifiers to describe one's purpose is, essentially, a clarification activity. The clearer our purpose, the more likely we are to accomplish it.

Participants may have already written a personal mission statement. If so, this plank is satisfied by reviewing that statement, updating it, if necessary, and recording it. Personal mission statements are, by definition, personal. Participants may choose to share key words of their mission statements, or a summary, instead of sharing the statement verbatim.

If participants have not yet written a personal mission statement, then this plank should be labeled "under construction." The rest of the platform can be designed and the personal mission statement plank can be added later.



## Foundation Plank: Core Values

Core values are our “rules of the road.” They represent a proactive decision describing what is in bounds and what is out of bounds during our journey. Below is a starter list of possible core values. Read through the list briskly and mark the ones that resonate with you. Mark as many as you like. Feel free to add to the list. Then, from the subset of marked items, choose a handful (3-5) that are most important. Record this handful of values and elaborate a bit on each one.

Honesty	Integrity	Enthusiasm	Creativity
Excellence	Optimism	Service	Humility
Boldness	Courage	Individuality	Cooperation
Success	Synergy	Reflection	Contemplation
Analysis	Recognition	Self-control	Fairness
Beauty	Self-awareness	Social-awareness	Persistence
Insight	Knowledge	Sustainability	Dependability
Truth	Balance	Design	Centeredness
Prosperity	Abundance	Discipline	Partnership
Community	Grace	Relationship	Enlightenment
Purpose	Sacrifice	Gratitude	Loyalty
Fortitude	Judgment	Inspiration	Character

## Platform Plank: Self-knowledge Instruments

It is likely that all participants have, at some point, completed a personality inventory, a temperament assessment, or another self-knowledge instrument. Extract from the results of those instruments some salient and valuable insights and record them here.

## Platform Plank: Unique Selling Proposition (USP)

A USP is a marketing term used to describe a product’s best argument to the consumer for making a purchase. It is like a brand. It differentiates the product from similar offerings. Supermarket shelves are crowded with different brands of the same item. The best-selling items make a clear case to consumers for “why buy me?”

School administrators are not consumer products, to be sure. A leader’s USP (a personal brand, of sorts) makes it easier for followers to find and follow his or her leadership. A personal USP differentiates and clarifies, for all stakeholders, the case for “why follow me?”

A simple way to begin developing a personal USP, is to review the results from the previous platform plank, Self-Knowledge Instruments, and choose two descriptors that illustrate two different, yet complementary aspects of one’s personality. Bold, but thoughtful. Organized, yet flexible. Driven and team-oriented. A school leader builds a USP by living the chosen characteristics, not by advertising them. The effect is the same, however.

In the automobile world, Volvo is recognized for having a particularly clear USP. Volvo’s two USP characteristics are safety and longevity. One of Volvo’s best advertising slogans is “Volvo for life.” Hear the double meaning? Buy a Volvo and save your life... and, keep it for life.

Because of Volvo’s strong USP, when customers drive onto the Volvo sales lot, they are essentially pre-qualified as buyers who are interested in a safe, long-lasting car.

Look through the information provided from your self-knowledge assessments. Add other characteristics of your leadership that you know to be true. Choose two complementary attributes. Wordsmith the two attributes a bit to make the phrasing memorable. Record your results on this platform plank. *This platform plank is difficult, but powerful.* That’s its USP.



### Platform Plank: Positive Prophecy

Who we become is shaped by the predictions of others. This platform plank asks participants to remember and record some of the positive predictions that were made by significant others. Perhaps a school principal said to you in your first year as a teacher *“I see leadership potential in you. I hope you’ll consider getting your Master’s in educational administration. I think you’d make a fine administrator one day.”* Maybe a favorite teacher predicted that *“You’d be a great teacher. I hope you’ll keep that in mind.”* Your parents may have said something like *“You have a natural heart for others. I know you’ll do something wonderful for other people in your life.”*

It is instructive and insightful for us to recall and record these early predictions. They are often accurate and to recall and list them is encouraging. For this plank, recall and list some of your most memorable positive prophecies. Note: Not all participants will be able to recall positive prophecies. Not everyone is surrounded by supportive voices during their developmental years. If this is the case, simply write: “under construction” and move on to the next plank.

This is a good time for all participants, those with many positive prophecies and those with few, to redouble one’s determination to be a provider of positive prophecies to others.

### Platform Plank: Model Resonant Leader

Name (or write initials) a few of the most effective leaders you’ve ever known. Now, list what traits or attributes of these people most **resonate** with you. What characteristics do they possess that you’d like to emulate in your own leadership journey.

### Platform Plank: Dissonant Anti-Leader

Think of a few especially ineffective leaders you’ve known. Give them a pseudonym or false initials. Now, list the traits or attributes they possessed that are most **dissonant** with you.

What characteristics do they possess that you’ll do your best to avoid in your own leadership journey?

### Platform Plank: Ego Excesses

One of the most important aspects of self-knowledge is the ability to predict one’s own likely downfall. If your leadership skills were an investment portfolio, which ones are the most likely to lose money? What is your leadership Achilles’ heel? For many, our most likely leadership failures occur in the overuse of our greatest strengths. We can refer to this as an ego excess. An ego excess is a strength overused or over extended. A leader with great persuasion skills could be tempted to use those skills for personal gain, rather than for good of the organization. A leader with great empathy and teambuilding skills might be tempted to seek harmony instead of taking a strong stand for core principles. These are ego excesses—too much of a good thing.

For this plank, identify which personal traits, if allowed to run amok, are most likely to lead to failure.

**Extra credit.** . . .ask a few others who know you well, both personally and professionally, what they believe your ego excesses to be. Often our ego excesses hide in our blind spot. A blind spot, for purposes of leadership development, is defined as a set of personal traits that others can see plainly, but that are invisible to us. All humans have a blind spot. As a leader, it’s a good idea to know what’s in there.

### Platform Plank: Wild Card

A wild card is an important aspect of an individual’s leadership platform that does not fit into one of the listed categories. It is a unique trait or characteristic that was born of a unique circumstance. For example, a school administrator might share that they were born in Japan and grew up, through middle school, immersed in Japanese culture. This experience resulted traits that central to the administrator’s current PLP. Another administrator might share that they are a cancer survivor, and that experience has shaped their PLP. An administrator’s strong religious faith, or experiences as an athlete, or being raised on a farm might all be important wild cards that, if not captured, would result in an incomplete PLP. Note: In the design and construction of a PLP, wild cards are optional.



**EXERCISE, cont'd: Share your PLP and receive feedback.** After designing and creating a PLP, it is profitable to share it with other like-minded administrators and receive feedback. This is best accomplished in a group of three or four administrators who share their foundation and platform planks one at a time and receive feedback from the group. For example, participant A shares her **Foundation Plank: Personal Mission Statement**. The group provides feedback on the plank's *clarity* and the degree to which it is *compelling*. Those are the two consistent feedback criteria. Is it clear? Is it compelling? Then another administrator shares his personal mission statement plank and receives feedback. The group shares and receives feedback as they spiral through the entire PLP. Participants are encouraged to take notes on their feedback and use the notes to enhance their PLP.

## **Treatment 2: Clarifying Mission, Vision, and Core Values**

(approximate time allotment: 45 minutes)

### **Engagement Platforms: Regional Meeting, Coaching and Mentoring**

A key component of one's understanding of self and others is **clarity of purpose**. What are we trying to accomplish? What are our motives? What guides our day to day work? An analogy: clarity of purpose is like a triple braided rope. The rope is more than three times stronger than the individual strands. The strands are strong by themselves, but stronger yet when they bind together to form a composite. The three strands that comprise clarity of purpose are: mission, vision, and core values. These components are strong individually, but stronger yet when they are woven together.

**EXERCISE:** Engage in a Socratic seminar on the article: *Fighting Fuzzy Purpose*

A Socratic seminar is a group discussion strategy that leads to higher level thinking and interdependent learning. Named after Socrates, the great Greek questioner, a Socratic seminar asks participants to read a piece of writing (or consider a piece of art) and participate in a small group discussion by responding to these three prompts (or similar):

1. Re-name this selection of writing with a new title that captures the essence of the author's purpose. (This prompt cause the participants to consider the gestalt of the selection, before considering the details.)
2. Pan for gold. Share specific excerpts from the selection that were especially valuable or insightful, in your opinion. (This prompt steers the participants into the details of text)
3. Share a specific idea from the text that has immediate application for your work. (this pushes the participants toward the future and how they might specifically apply ideas from the selection.)
4. In all cases, participants are invited to not only respond to the prompts, but also to respond to others' responses.

### **Fighting Fuzzy Purpose**

Perhaps the first and most important task of a successful education leader is to establish **clarity of purpose**. The vocabulary list for this concept well known...mission statements, vision casting, core values identification, goal setting, coherence of effort, teamwork, and shared commitment to a common future. Successful education leaders often define this task by defining and attacking its enemy...**fuzzy purpose**. Organizational psychologists suggest that 70% of interpersonal conflict in the workplace is not the result of employees' poor interpersonal skills, but rather of unclear direction. Fuzzy purpose leads to a perpetual low performance state called psychic entropy. Entropy is a scientific term that refers to the degree of disorganization or randomness in a system. Psychic entropy, then, is the degree of disorganization of thought and intention in a person or a group. The effects of fuzzy purpose are well known...low energy, pettiness, interpersonal conflict, poor teamwork, and a lack of persistent follow-through.

**Mission, Vision, and Core Values**...taken together, form a powerful cocktail for curing fuzzy purpose. Each of these three key direction setting ingredients adds an essential element to the overall mixture. Mission establishes purpose, vision adds clarity and energy, and core values guide the day to day operations. When these three complementary forces combine, the result is clear, compelling direction. For individuals and for groups, clear direction results in high energy, graceful interaction, focus, persistence, teamwork, and collaboration.



**Mission.** In its essence, mission is the answer to the questions: What is my (our) purpose in this undertaking? Why am I (we) choosing to be a part in this enterprise? When it is all over, what are the most important contributions I want to make? Mission is foundational. It pertains to all our endeavors. It is long-lasting and doesn't change from application to application. Mission serves to provide our primary compass bearing, our general direction, even in uncertain times. A mission statement, then, whether it is that of an individual or that of a group, is an expression of this foundational, purpose describing, life's direction. A functioning mission provides real-time, dynamic, individual and organizational purpose and direction.

#### **Key understandings on Mission:**

1. Forgetting your mission leads to getting caught up in meaningless details.
2. Mission enables us to recognize and focus upon the important...and to say "no" to other attentions.
3. You are either living your mission or you are living someone else's.

**Vision.** In its essence, vision is the answer to the question: What do I (we) want to create here, at this time? It is more focused than mission. Rather than a purpose or a direction, vision is a mental image of a desired future state. Vision is specific, it is tangible. It is an important project on the journey to mission fulfillment, not another expression of the mission itself. In contrast to mission, we hold many visions simultaneously. We finish some, begin to work on others, all the while holding mission constant. Vision can be small or large, short term or long term, simple or sophisticated. A functioning vision provides energy, focus, and a sense of urgency. A vision enables us to prioritize our resources towards mission fulfillment – what should be done first, second, what should not be done, or left to do later?

#### **Key understandings on Vision:**

1. Vision produces energy.
2. Vision is best developed as three images – past, present, and future.
3. It is the gap between present and future that produces energy.
4. Both personal and shared visions are necessary. Neither are, by themselves, sufficient.

**Core Values.** In its essence, core values are "rules of engagement." They are the answer to the question: "How are we going to behave, especially toward one another, as we pursue our visions and mission?" Even in wartime, there are agreed upon values governing how combatants are to engage one another. These values are called "rules of engagement." What is permissible in pursuit of our visions and mission and what is not? In the organizational setting, core values govern how we will interact with each other, with colleagues, with students, families, with our environment and resources, and with external stakeholders.

#### **Key understandings on Core Values:**

1. Clear and commonly understood core values support better communication, higher job satisfaction, less conflict, and better teamwork.
2. Core values address how we view our time, resources, colleagues, clients, and communities.
3. Core values should be proactive, intentional, clear, written down, and practiced- with feedback.

#### ***Some ways to remember how the three key ingredients work together...***

Mission is the **why**. Vision is the **what**. Core values are the **how**.

Life and work is a journey. On that journey, **Mission** is a compass, always pointing toward true North.



**Vision** is a picture of the destination. We keep it in our pocket to clarify our direction and add motivation. **Core values** are our “rules of the road.” They tell us what’s in bounds and what’s out of bounds as we travel.

### **Treatment 3: Applying Customer Service Strategies to School Stakeholders**

(approximate time allotment: 45 minutes)

#### **Engagement Platforms: Regional Meeting, Coaching and Mentoring**

The business, sales, and marketing worlds are hotbeds for ideas on customer focus. Customer relationship management, or CRM, is a burgeoning field in business software development as businesses in all sectors scramble to attract and keep loyal clients and customers. Top minds in market research and social science are highly recruited to apply both science and art to business consulting, customer analytics, and social media development. To be sure, schools and businesses have vastly different aims and processes. Yet, there are bound to be some ideas and tactics that overlap. Surely some of the exciting research on customer relationships has application to school settings. This treatment examines four customer focus ideas from the business world that appear to have good crossover value for school leadership.

Customer focus = stakeholder focus. By definition a stakeholder is any person or group who has a “stake” in a school’s success. Stakeholders benefit when a school is succeeding at its mission and suffer when it is not. By that definition then- students, parents, teachers, administrators, school board members, community members, and those that work in local business and industry are all large stakeholders. Many more are smaller stakeholders. In a sense, stakeholders are educational customers.

**EXERCISE:** Consider the article by Inc.com contributing editor Geoffry James, *Be Customer Focused: 4 Basic Tactics* (James, 2012). From your connected device, retrieve the article from [www.inc.com/geoffrey-james/be-customer-focused-4-basic-tactics.html](http://www.inc.com/geoffrey-james/be-customer-focused-4-basic-tactics.html). In the article, James offers four tactics for customer focus success:

1. Constantly gather information
2. Get embedded in their strategy
3. Emphasize customer retention
4. Debrief after customer engagements

In small groups, discuss how school administrators might apply these four tactics from the business world to the education world. After a time of discussion, post the four tactics on walls and circulate in small groups adding application ideas to the four tactics. Record artifacts.

### **Treatment 4: Capacity Mapping of Faculty and Staff**

(approximate time allotment: 60 minutes)

#### **Engagement Platforms: Regional Meeting, Push in to District, Coaching and Mentoring**

Capacity mapping is a simple and illuminating process where the experiences, abilities, talents, skills, interests, and passions of all the various individuals in a group are illustrated in graphic format for all to see. Capacity mapping provides the data to answer the question “what are we, because of the unique, current capacities of our people, able to accomplish for our school right now, without further development or delay?” Capacity mapping is an inherently positive process for a faculty and staff since it highlights and catalogs each individual’s unique and valuable gifts and offers them up for the benefit of the team.

**Teacher Name:** \_\_\_\_\_

Capacity 1: \_\_\_\_\_

Capacity 2: \_\_\_\_\_

Capacity 3: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**EXERCISE:** Build a capacity map of the small group in which you now find yourself. Then, at your first opportunity, recreate the experience back at your home school.

### **Treatment 5: Bus Tour of Student Addresses**

(approximate time allotment: based on context)

**Engagement Platforms: Push in to district, coaching/mentoring**



A moving and memorable way to build understanding and appreciation for the students we serve is take the time to travel to their home address and imagine them in that context. It is most effective to match individual student names and photos with individual addresses. Since it will take a bit of time to cover the miles that link together students' homes, participants can use the time to review and personalize other important demographic and contextual data about students and families. **Extra credit:** Have a school counselor or social

worker volunteer as a tour guide. They will be able to provide even more insight into individual student characteristics, family dynamics, and neighborhood issues. They can also use portions of the travel time to facilitate discussions and/or Q & A that will increase understanding. It is rare to find a faculty member or administrator who has participated in a well-facilitated bus tour that did not find the results well worth the time and effort.





# Missouri Leadership Development System (MLDS)

## Emerging Level Learning Experience 4:

A primer on decision making for new school administrators: How to get things done, empower others, and make the right call on tough issues.

### Introduction and Rationale:

School administrators are asked daily to make hundreds of decisions. Some are simple, some are complex, and some are seemingly impossible - all are important. If the sheer number of important decisions to be made were not challenging enough, administrator decision making is made more complex by a number of cultural and contextual factors.

Communities and the schools that serve them are increasingly more diverse. In addition to demographic distinctions and implications, schools must also address a growing diversity of individual student needs. Expectations for the statistical performance of schools is higher and more visible. And, the political structures that govern and fund schools are increasingly polarized (Shapiro & Stefkovich, 2016).

Since one of the fundamental purposes of public schooling is to prepare the citizenry to participate in a democratic society, it falls on schools to pattern their decision making after democratic principles. School leaders are not merely making management decisions, they are at the same time expected to model participative, democratic governance (Fullan, 2005).

School leaders have, by virtue of their official position, a good deal of power over valuable, and often scarce, resources. Administrators routinely make decisions about things that impact the quality of other's work lives - budgets, room assignments, committee responsibilities, supervision duties, and planning periods, etc. With power over resources comes a responsibility to exercise that power in an ethical and moral manner with both integrity and transparency, (Fullan, 2005, Strike, Haller & Soltis, 2005). In his work, *Paradigms and Promises: New Approaches to Educational Administration*, Foster (1986) writes "Each administrative decision carries with it a restructuring of human life. That is why administration at its heart is the resolution of moral dilemmas."

Each administrative decision contains in it a natural duality. Not only must school leaders make decisions that are rational and technically competent, but also must consider the symbolic, sometimes irrational, impact of the decision on others' perceptions and the school's culture (Deal & Peterson, 1994, 2009).

The learning experience: **A primer on decision making for new school administrators** seeks to:

- A. Develop a clear-eyed understanding by administrators of the importance and potential pitfalls of leadership decisions.
- B. Engage school administrators in an array of learning designs that will build their awareness and basic skills in administrative decision making.
- C. Provide practice and feedback toward initial mastery in the areas of participative decision making, empowerment of others, avoiding unintended consequences, and ethical/moral decision making.

### MLDS Engagement Platforms and Treatments for LE 4

A primer on decision making for new school administrators: How to get things done, empower others, and make the right call on tough issues.

#### Treatment 1: The Technical/Symbolic Duality of Leadership Decisions

(approximate time allotment: 45 minutes)

**Engagement Platforms: Regional Meetings, Coaching and Mentoring**



It is wise to remember that every administrative decision has a dual nature. One part of a decision is purely technical; what is fastest, easiest, least expensive, and more effective. The other part of a decision, the symbolic part, is less obvious, but usually more important and the effects are longer lasting. The symbolic effect of a decision is less visible, but more impactful because symbolism operates in the realm of organizational culture.

**EXERCISE:** Develop examples that illustrate the dual nature of leadership decisions. Position the examples in one of two categories.

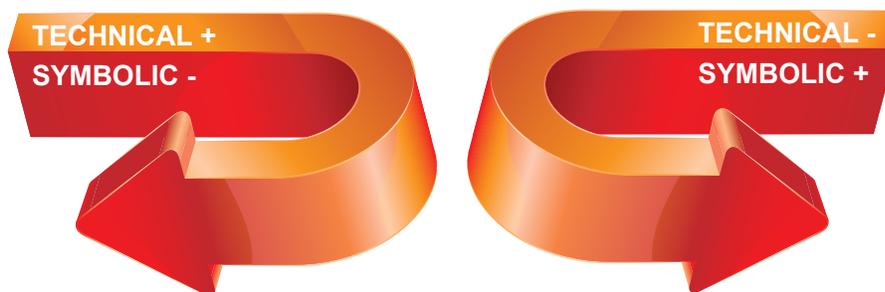
Category A: Decisions which are technically correct, but symbolically negative.

For example: A principal might decide to establish a separate morning drop-off point, behind the school, for students with physical disabilities. Technically that would provide more privacy, more space to maneuver wheelchairs, and speed up the carpool line. Symbolically, however, the decision is a disaster. The optics and symbolism are profoundly negative. The scene of non-handicapped students entering through the front door and handicapped students entering through the back door sends a powerful and memorable negative message.

Category B: Decisions that are technically questionable, but symbolically positive.

For example: An elementary principal decides to take her lunch at a small table in the cafeteria and invite two students each day to join her for lunchtime reading. Technically, this decision is questionable. The principal is not a trained reading teacher. The total reading time is only 10-12 minutes. The students can choose anything to read so their choices are often above or below level. There are 1500 students in the school so only a small fraction ever get to participate. Symbolically however, the decision is a winner. The cultural message is that reading is important and enjoyable. Everyone is a reader at our school—even the principal.

After examining these (and/or other) examples as models, Populate the two categories with additional example scenarios. Real life examples are welcome, but be sure to change the names to protect the symbolically challenged.



**Extra Credit:** Make an anchor chart that illustrates the technical/symbolic duality of administrative decisions and post it in a place that is often visible. Do this as a reminder and to keep the concept in the front of your mind, until it is second nature. Take a photo of the chart and share it with colleagues.

## Treatment 2: An Introduction to Participative Decision Making

(approximate time allotment: 45 minutes)

### Engagement Platforms: Regional Meetings, Coaching and Mentoring

Sometimes an administrator needs to make a quick decision, communicate it to the staff, and move on. At other times it is wise to get advice or delegate decisions to others. Here is a simple list of five levels of participation that administrators can employ to match the type of decision to the circumstance. Each of these types of decisions can be effective. Each of these types of decisions has pros and cons. The trick is to match the level of participation to its best-fit circumstance.



1. I decide
2. I seek others' advice and input, then I decide
3. I provide advice and input, then delegate the decision to others
4. We vote on the decision- majority rules
5. We make the decision by consensus

**EXERCISE:** Generate a list of pros and cons for each of the five levels of participation. For example, a pro for “I decide” is that it is a fast method of decision making. A con for “vote on the decision” is, if the vote is close, nearly half the voters will be disappointed.

**EXERCISE:** Based on the pros and cons of each level, generate a list of example decisions that are a best-fit match for each of the five levels. For example, If some of the faculty want nachos and salsa for the PLC meeting and some want pita chips and hummus—take a vote.

### Treatment 3: A Primer on Ethical Decision Making

(approximate time allotment: 60 minutes)

#### Engagement Platforms: Regional Meetings, Coaching and Mentoring

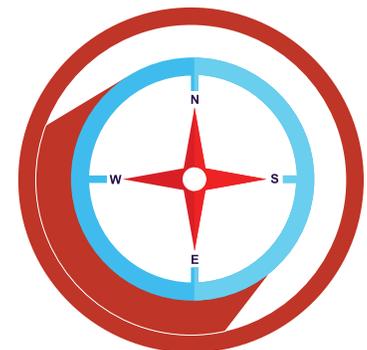
Successful school leaders inspire trust and confidence in their schools through their consistency and predictability in matters of high moral or ethical importance. This treatment details a process by which administrators can begin with a natural sense of ethics and fair play and develop those instincts into a dependable “internal compass” that can be trusted for direction even in the midst of ambiguous circumstances.

#### Three components of successful ethical/moral decision making:

1. **An external standard to follow.** Ethical and moral decisions require a set of standards outside of the self... a chosen set of values, beliefs, and commitments that exist above and apart from the current situation and from current feelings and emotions. A compass can't point North unless North is external to the compass' current position. At the magnetic poles of the earth a compass simply spins. Similarly, an administrator's ethical/moral standards, in order to orient toward them, must exist externally.

**EXERCISE:** What external standards do you follow? Examples: statements of professional ethics from school or district materials or professional organizations, personal and organizational mission statements, religious beliefs, the golden rule, others...

2. **An internal compass.** Since many ethical and moral decisions are made quickly and at the subconscious level, leaders must develop the “habit of ethics,” an internal guidance system that operates without conscious attention. This internal compass becomes more accurate over time as it is calibrated. Leaders can calibrate their internal compass by practicing making small, easy ethical decisions at the conscious level- by intentionally noticing them.



**EXERCISE:** Share 3-5 small ethical decisions you've made over the past few days. Perhaps you made them automatically at the time. Notice them intentionally now.



Share the ethical/moral attributes of the decisions. Make a habit of this and your internal compass will become more and more accurate- able to find true north from any location.

3. **A way to choose.** Most ethical decisions are simple and straightforward. Some are not. For the tougher dilemmas of ethical decision making it helps to have a process- a way to choose when the alternatives are not obvious. Here is a basic process for making tough ethical decisions.
  - a. Avoid binary thinking. Buy some time, if possible. When faced with an urgent decision, the human brain reduces the complexity to two choices- friend or foe, for me or against me, right and wrong. Recognize binary thinking and avoid it.
  - b. Make the decision explicit. Write it down, draw a picture, list pros and cons. Representing the decision graphically can help the brain see hidden insights.
  - c. Get some counsel. Share the dilemma with one or more others whom you respect as having a well calibrated compass. Where is their north? You won't be simply adopting another's advice. Rather, you're gathering multiple compass headings, in addition to you own.
  - d. If still in doubt- take the higher road. After a, b, and c, if the best decision remains elusive, choose the path that requires the most of you- the higher road. This advice is admittedly metaphorical—compasses and roads. At this point in the decision, however, the higher road is often easy to spot.
  - e. Own the decision, but reserve the right to get smarter. By definition, these are difficult, no-win decisions. They won't all turn out well. A tough ethical decision is its own reward. It is gratifying to work the process and make the best call possible.

**EXERCISE:** Try out the “A way to choose” process on one or more of these ethical dilemma scenarios. These scenarios have no predetermined right or wrong answers. They are simply exercises for practicing the “A way to choose” process. Make your thinking explicit along the way.

### **Ethical dilemma scenarios: The adventures of Jango Reinhart, school administrator.**

#### **Scenario 1: Green Thumb.**

Jango Reinhart is conducting a post-observation conference with the school's vocational agriculture teacher, Jim Greengrass. Jango judges Jim to be an adequate teacher, but not without need for improvement in several key areas. The observation conference is over. Jango has again rated Jim as adequate.

Jango, however, is restless with a dilemma... Jim is very outgoing and friendly and consistently offers to work extra around the school on landscaping projects and school beautification. Jim insists that this is his hobby and he doesn't mind at all. He often plants flowers and mulches around plants at his own expense. Jango is uncomfortable with Jim's generosity because he feels an obligation to return the favor for Jim's extra work. Jango wonders if, even unconsciously, he slants Jim's evaluations to the positive side as a sort of reward for the extra work. Jango wonders...“If Jim did not do so much around the school, would I be quicker to call attention to some of his classroom weaknesses?”

Should Jango continue to allow Jim to do extra work around the school?

Should Jango re-do Jim's evaluation?

How would you advise Jango to proceed?



## Scenario 2: Sticky Fingers.

Sally Saboteur is an 8th grade Math teacher at Jazzville Middle School where Jango Reinhart is principal. Sally is a professional obstructor, in Jango's opinion. She is always trying to stall, obstruct, and oppose any and every effort at school improvement. Sally is not a great teacher, but she is not incompetent and the former principal gave her fairly high evaluations. She is pretty well connected in the community and believes she is "untouchable."

One day after school, Polly Pureheart, the school secretary comes into Jango's office with a piece of paper. "Look what I found on the copying machine." She says. Jango takes a look. "Oh my my," Jango says to himself as he stares at what appears to be a summons to appear in superior court in a neighboring city to answer charges of shoplifting. The name on the summons... Sally Saboteur. Sally must have left the copy on the machine as she was making copies for her records. Jango ponders his options... should he leak the information on Sally as justice for her ongoing bad attitude? Should he simply return the paper to Sally and say "I believe this is yours. It was found on the copy machine yesterday." Should he swear Polly to silence, throw away the paper and keep quiet?

That afternoon at the faculty meeting, Sally is particularly obstructive... rolling her eyes and huffing and puffing at everything Jango said. Then she started publicly criticizing two of the first year teachers for being "too creative." What should Jango do??

## Scenario 3: Juicy Dilemma

Jango Reinhart is on the district's soft drink policy committee. The committee's job is to review proposals from various soft drink companies for contracts in the districts 4 high schools and 7 middle schools.

The proposals are down to two contenders. Both offer good financial returns to the schools as a percentage of sales. One vendor offers only juice and water drinks in their machines while the other offers juice, water, and regular soft drinks too.

Jango has always thought vending machines should offer healthy alternatives to soft drinks. Both proposals have the healthy drinks, but one offers soft drinks too. Jango knows that the revenue will be greater from the vendor who offers soft drinks too because sales will be much higher. Student health is a priority for Jango. But should the choice be the students' or the committee's? The money from the drink sales funds several positive initiatives that help underprivileged kids.

What should Jango do??

## Scenario 4: Not Another One

Mrs. Efficacy is a truly great teacher. Her scores are always on top. Her students and their parents sing her praises and she was chosen to be the district's teacher of the year this past year.

Jason Wellbehind is a new student. Jason just enrolled on March 15 and his records show that this is his 3rd school this year. His parents have had financial problems and they move from rental house to rental house to avoid landlord problems.

The guidance counselor, Diana Lemma (Di for short), comes into Jango's office with a request... "Let's place Jason in Mrs. E's language arts class. He's so far behind- she's the only teacher I know who can help him catch up this year." "How many students does she have now, asked Jango." "32 I'm afraid" said Di. "How many students do the other LA teachers have?" asked Jango. "25, 24, and 27" replied Di.

What should Jango and Di do? Is it fair to continue to overload Mrs. E's class? What if she agrees- does that change things? Should Jango move some of Mrs. E's better students into other LA classes to make room? What would you advise?



# Missouri Leadership Development System (MLDS)

## Emerging Level Learning Experience 5:



Reading and Shaping School Culture: How to see and shape the invisible, but powerful, forces that fuel or freeze a school's improvement efforts.

### Introduction and Rationale:

Each and every school comes equipped with a strong, existing culture. This invisible, but powerful, force is the primary determiner of success for a school's improvement efforts (Fullan, 2007; Hollins, 2015). It is an unfortunate twist that many school administrators are selected for their positions based on their abilities to produce tangible, structural results; designing a school schedule, supervising employees, enforcing school discipline, or balancing a budget. However, beginning on day one of the job as school administrator, the primary factor for success is no longer tangible (Cunningham & Cresso, 1993). It is the leader's ability to understand, assess, and positively shape the intangible, but powerful, force that fuels or freezes a school's improvement efforts- school culture.

Culture, being an invisible force, lends itself to several definitions and descriptions...

- The totality of socially transmitted behavior patterns, arts, beliefs, institutions, and all other products of human work and thought characteristics of a community or population. (The American Heritage Dictionary, 1975)
- The set of attitudes, values, goals, and practices that characterizes a company or corporation. (Merriam-Webster's Collegiate Dictionary, 1993)
- The guiding beliefs and values evident in the way a school operates (Fullan, 2007)
- The qualities of any specific human group that are passed from one generation to the next. (Kotter & Heskett, 1992)
- A system of informal rules that spell out how people are to behave most of the time. (Deal & Kennedy, 1982)
- The way we do things around here. (Bower, 1966)

The culture of a school plays an essential role in improving performance. Positive culture can infuse work with meaning, passion, and purpose (Deal & Peterson, 1999). A positive school culture is associated with more rapid and lasting school improvement, higher teacher motivation, greater teacher collaboration, more application of professional development skills, reduced absenteeism, and higher levels of adult and student learning (Hofsteade, 2005; Fullan, 2007; Deal & Peterson, 2009).

The learning experience **Reading and Shaping School Culture** seeks to develop administrators' abilities to:

- A. Gain a clearer understanding of the nature and power of school culture by identifying, describing, and analyzing powerful non-school organizational cultures.
- B. Demonstrate the ability to understand, read, and assess current school culture by applying culture assessment criteria.
- C. Understand elements of culture such as heroes, stories, myths, traditions, rituals, ceremonies, symbols, and signs, which have, over time, shaped the current school culture.
- D. Assess and improve aspects of personal and organizational trust.



## MLDS Engagement Platforms and Treatments for LE 5

Reading and Shaping School Culture: How to see and shape the invisible, but powerful, forces that fuel or freeze a school's improvement efforts

### Treatment 1: Creating an Operational Definition of School Culture

(approximate time allotment: 45 minutes)

**Engagement Platforms: Regional Meeting, Retreat, Coaching, Twitter Event**

School culture, organizational culture, school climate, group norms, the way it feels around here...these are all descriptive words and phrases that point to a key concept in education leadership. This treatment asks participants to consider a number of definitions and descriptions of school culture, thoughtfully consider and analyze each one, and synthesize a personal operational definition of the concept.

1. Start with the definitions and descriptions offered in the Introduction/Rationale.
2. Research other definitions and descriptions.
3. Create a synthesis of the best descriptors from the introduction and your research.
4. Wordsmith your personal operational definition.
5. Share your definition with at least three other colleagues—consider their work.
6. Create a second version of your operational definition that includes some of your colleague's best thinking.
7. Create a graphic organizer to capture and illustrate your work.
8. Post, share, comment, and provide feedback.



### Treatment 2: Re-estimating the Effect Size of School Culture

(approximate time allotment: 45 minutes)

**Engagement Platforms: Regional Meeting, Retreat, Twitter Event, Push-in to Districts**

Since the concept of organizational culture is, well, a concept—it is common to underestimate its power and effect size. It is abstract. It is essentially invisible. As concepts go, it is a soft concept, not quantitative, measureable and visible like a school schedule or a budget. Organizational culture is a paradox. It is invisible, yet omnipresent. It is a soft concept that yields hard-hitting effects. It is easy to miss, but impossible to avoid. Like viruses, gravity, and electrical fields, organizational culture's wispy appearance belies its formidable power. Culture is best examined by looking toward its effects, rather than directly at the culture itself. Strong organizational cultures alter and align the behavior of people within the culture. A strong culture changes what we do—it alters our behavior. It similarly alters the behavior of others around us to produce a more uniform set of behaviors among the group—alignment.

**EXERCISE:** Identify examples of powerful cultures—places or events where there is a strong, mysterious alignment of human behavior. To begin with, let's stay away from school culture examples. Rather, identify several non-school cultures that meet the criteria—they **alter** and **align** the behavior of individuals and groups. Elevators, rock concerts, or college football games might be a good place to start...add to the list, and explain how and why you think organizational culture works in these instances.



1. Individually, think and record examples of strong, non-school cultures.
2. Share examples along with best efforts at describing how you believe the altering and aligning actually works.
3. Share further examples of where you believe powerful non-school cultures have been intentionally designed to alter and align human behavior.
4. Think hard and, with your small group, push beyond the first few “easy” examples. As any skillful teacher knows, example building is the best assessment for concept attainment.
5. **Extra credit:** Try to see and explain the actual cause-effect relationships that comprise the evidence for a strong culture. What happens? What happens next? What happens as a result of what happened?

A sobering, yet promising thought: Stephen R. Covey, in his bestselling book *Principle Centered Leadership*, writes...“Where culture is strong, laws are unnecessary. Where culture is weak, laws are unenforceable.” (Covey, 1991)

### **Treatment 3: Assessing School Culture: Making the Invisible Visible**

(approximate time allotment: 3 hours, depending on proximity to other schools)

#### **Engagement Platforms: Regional Meeting, Retreat, Coaching, Push-in to Districts**

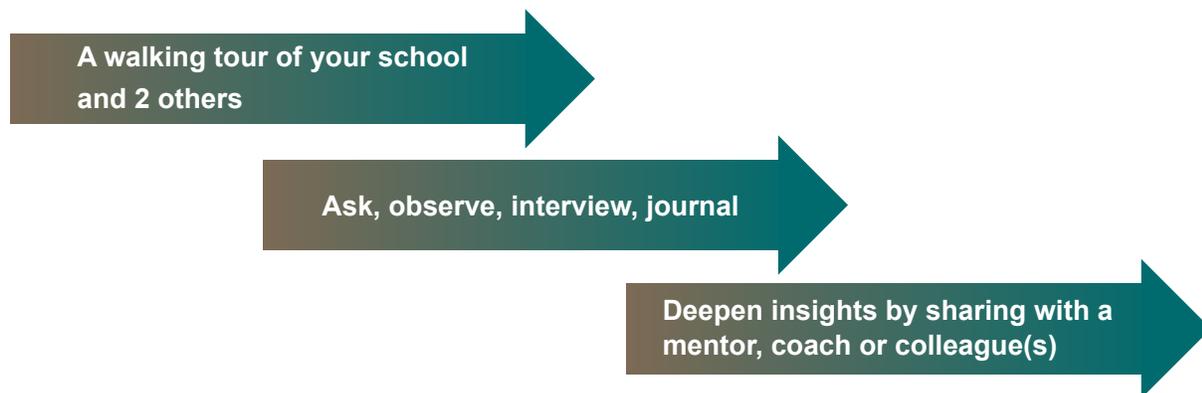
Since school culture has such a powerful influence on individual and group behavior, it is important to develop the ability to see it and assess the degree to which the culture is influencing behavior in the direction we desire. Organizational culture, being invisible, does not lend itself to direct observation and assessment. We can, however, gain insight by examining the effects and artifacts that any particular culture produces. In this way, school administrators are a bit like anthropologists, seeking to infer meaning from the evidence left in the wake of a school’s culture. Admittedly, this sounds pretty theoretical. Let’s examine some practical ways administrators can assess school culture by looking for that culture’s effects and artifacts. These strategies are adapted from the sources listed in the introduction and particularly from *Corporate Cultures: The Rites and Rituals of Corporate Life* (1982), by Terrence Deal and Allen Kennedy, pages 129-135.

1. **Study the physical setting of the school.** The school’s culture doesn’t determine the actual physical layout or architectural style of a school. Culture effects can be seen, however, in the manner in which humans have altered the environment. Is the school tidy or messy? What is on the walls and display cases? How is student work displayed? Human beings alter their work environments in ways that provide accurate insights into the cultural forces at play. Administrators do well to learn to see and analyze these clues. It’s difficult to change a culture without first seeing it.
  - A. Do a walking tour of your school. Take notes. Look for where people have altered the environment. Analyze what you see. Link artifacts from the physical setting with possible culture clues.
  - B. Ask two administrator colleagues, who are not familiar with your school, to accompany you on the walking tour. Newcomers to an environment always have different insights than people who work there every day.
  - C. Plan to reciprocate. As you accompany your colleagues on walking tours of their schools, you’ll gain insights that will add value to your colleagues’ assessments and make you a better culture detective back at your school.
2. **Other practical ways to assess school culture:**
  - A. Ask open-ended questions. What’s our school culture like? What is like to work here? Who’s doing really good work lately? I noticed\_\_\_\_\_. What do you think that means?
  - B. Watch how strangers are greeted and treated. Outsiders always cause a culture to react in some way. Try to see the reaction.



- C. Observe how people spend their time. People don't have much discretionary time at school. So watching how people spend this scarce resource is telling.
- D. Note what stories, rumors, or anecdotes are being circulated.
- E. Interview newcomers. New employees have a short window of opportunity to better see aspects of a school's culture. In a short time, the window will close as they become a part of the culture and lose their outsider/newcomer status.

**EXERCISE:** Form a group of three administrators whose schools are in reasonable proximity. Complete a 30-minute walking tour of your school and of your two colleagues' schools. Take notes, discuss insights, note your increasing awareness and insight into school culture. Ask the questions and make the observations recommended above and record your insights. Write a brief journal entry about the insights gained through the questions, observations, and interviews. Compose a brief journal entry to capture your insights. Be ready to share and deepen these insights with your mentor/coach or as a part of an online function.



This quote, from the Effective Schools pioneer, Dr. Larry LeZotte, offers a keen insight into the role of culture in school improvement. Lezotte quips “You cannot improve a school from the outside. And, you cannot improve a school from the inside. To improve a school, you must be an insider with the eyes of an outsider.”

#### **Treatment 4: Identifying the Elements of School Culture**

(approximate time allotment: 45 minutes)

#### **Engagement Platforms: Regional Meeting, Retreat, Coaching**

An element is a fundamental, irreducible building block. Ask any Chemistry teacher...if you want to understand a substance and how it behaves, you must determine the elements from which it is made. And, to change a substance, you must change and recombine the elements from which it is made. What follows is a periodic table, of sorts, listing the elements that react and combine to form organizational culture. By knowing the elements, school administrators are better prepared to understand and re-shape the substance.

An incomplete list of the Elements of Organizational Culture:

Heroes and Heroines | Priests | Rites and Rituals | Routines | Ceremonies | Signs and Symbols

Shared Values | Shared Vision | History | The Cultural Network | Stories, Myths, Legends

Shared Beliefs | Group Norms | Place and Physical Structure | Language, Jargon, Metaphor | Other Elements



**EXERCISE:** Choose an organization, not your school, that you know well and interact with regularly. It could be a nationally known organization like Starbucks Coffee, Harley Davidson Motorcycles, or Google. It could be smaller and more local such as your church, a ball team, or a group of longtime friends. Using the elements of organizational culture above, diagram the molecular structure that best describes this organization. Choose which elements are front-forward and which are less present or absent altogether. Illustrate your work in a molecular diagram such as the example below.



### Treatment 5: Building a Culture of Trust

(approximate time allotment: 60 minutes)

**Engagement Platforms: Regional Meeting, Retreat, Coaching**

Organizational culture is powerful and persistent in its ability to alter and align human behavior. School administrators, as they become more skillful at seeing and shaping school culture, are in a position to not only understand and assess a culture, but also to participate in the culture and shape it from within. An administrator's personal characteristics, then, become important culture shaping elements. It's hard to imagine, for example, a lethargic principal leading the charge to create a high-energy school culture, or a secretive principal shaping a school's culture toward openness and transparency.

One characteristic that is present in high-performance organizations and markedly absent in low-performing organizations is **trust**. School leaders who can build and maintain high-trust relationships, both personally and organizationally, are in a position to optimize their school's effectiveness to the great benefit of all stakeholders.

The famous American psychologist and writer Carl Rogers was one of the first and best to speak and write about the nature of human trust and its importance. Rogers maintained that although trust was a unitary concept, it was best understood by examining its parts (McLeod, 2014). Rogers' work has been popularized, amended, and widely disseminated as the *four elements of trust- reliability, acceptance, openness, and congruence* (Ayers, 2009). These four elements of trust can help administrators to understand the concept of trust more deeply and also serve as an assessment approach to gauge an individual's or a school's progress toward a high-trust culture.



A closer look at the four elements of trust:

1. **Reliability**—Being dependable. The attribute of keeping commitments and following through on promises.
2. **Acceptance**—Being trustworthy. The attribute of being non-judgmental.
3. **Openness**—Being trusting. The willingness to freely engage in dialog and feedback, both personally and professionally. Self-disclosure.
4. **Congruence**—Being transparent. What you see (with all one's senses) is what you get. No surprises. No hidden agendas.

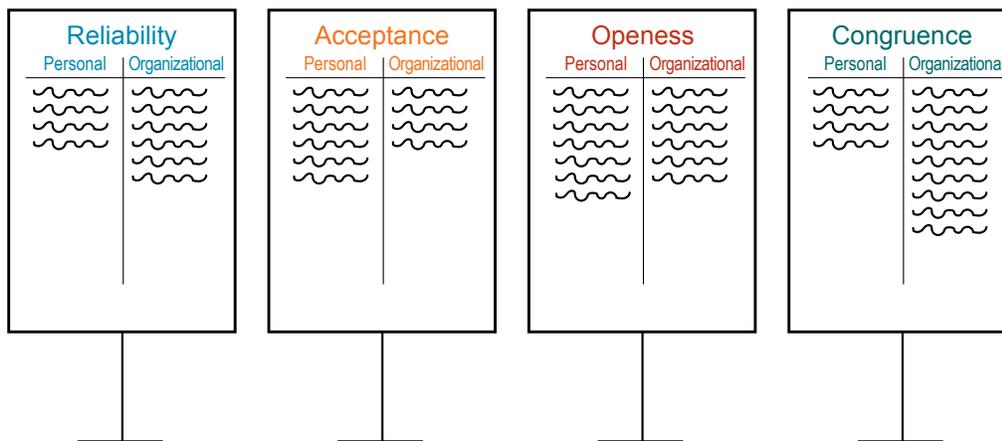
Note that these elements can be used to describe an individual or a group.

**EXERCISE:** It is unusual for a person to be naturally and equally strong in all four of these areas. It is more likely that each administrator will exhibit strength in one or two elements and recognize the need for development in the others.

- A. Do a personal self-assessment of the four elements of trust by reflecting on the brief descriptions and scoring oneself on a five-point scale.
- B. Then, organize four rounds (10 min. each) of interviews. Round 1: Ask those that self-scored highest in Reliability to meet with a few colleagues who self-scored low in Reliability. Take notes, gain insights, plan to improve by adopting some of the practices of the high scorers. Round 2-4: Same process for the other three elements.
- C. Regroup into mixed score teams (each member self-scored high in a different element of trust) and discuss how the elements of trust can be applied at the school level instead of the personal level.
- D. Extend your reflection and learning by engaging with mentors, coaches, and colleagues in person and online.



**EXERCISE:** Post blank flip-chart size paper in four areas of the room. Label the papers with the four elements of trust. On each paper divide the space (T-chart style) into two categories: personal and organizational. Post significant insights and learning to the collection areas. Do a gallery walk to view, appreciate, and aggregate the finished artifacts.



# Missouri Leadership Development System (MLDS)

## Emerging Level Learning Experience 6:



Make Time for Instructional Leadership: Managing the management so principals do the instructional work necessary to move teaching practice forward.

### Introduction and Rationale:

Research shows that principals can make a dramatic difference in student performance if their focus is on work with teachers to improve practice. Most leaders fall into a trap where their focus becomes school management. The culture in many schools supports a principal as manager rather than instructional leader.

In 2003 the Wallace Foundation funded the **SAM<sup>®</sup> process** to determine if leaders could create structures and culture where they could spend the majority of their time on instructional work rather than management. Ten years of research resulted in a surprising answer: Yes, and the success of a principal is not limited by staffing, social economic factors or school size.

Additionally, these principals worked a shorter day and expressed a higher level of job satisfaction. The research is clear: principals can spend the majority of their time working to improve teaching and learning. (PSA, 2011, Vanderbilt, 2015) The SAM process is now used by schools across the United States with services provided by the non-profit National SAM Innovation Project, NSIP.

Stephen R. Covey, in his bestselling book *7 Habits of Highly Effective People*, illustrates the school leader's dilemma through what he calls the time management matrix. In Covey's illustration, leaders are encouraged not to mistake urgency for importance in daily tasks, but rather to focus on the things that are not urgent, yet important. (Covey, 1989)

School leadership is second only to teaching among school-related factors in its impact on student learning. (Leithwood, 2004) High quality school leadership is an important factor in attracting and retaining high quality teachers (Mitgang, 2008). Once employed, high quality teachers are more engaged and productive when administrators focus on instructional capacity building and the moral implications of excellent instruction (Fullen, Cuttress & Kilcher, 2005).

Teacher working conditions, in schools where administrators are highly engaged in instructional leadership, are reported as more positive, professional, collegial, and productive (Wahlstrom, Louis, Leithwood, & Anderson, 2010).

This learning experience, **Making time for instructional leadership**, will focus on three activities developed and provided by the National SAM Innovation Project (NSIP):

- A. TimeTrack<sup>®</sup> Dashboard: Participants will use a SAM principal's time spent on management and instruction to determine the principal's overall priorities. Participants will also review the principal's time spent with an individual teacher to determine next steps in the teacher's development and consider how to apply the lessons learned in this simulation with their work with their own teachers.
- B. Time/Task Analysis<sup>®</sup> Participants will learn more about the instructional and managerial descriptors used by SAM principals and use a modified version of NSIP's Time/Task Analysis to track their time during a randomly selected school day while identifying barriers to instructional leadership time and focus.
- C. First Responders<sup>®</sup> Participants will identify and train key staff members to make the first effort in dealing with specified management issues at the school. Participants will use the NSIP training and support materials to begin developing a school culture where the principal is not the first person approached for management issues.



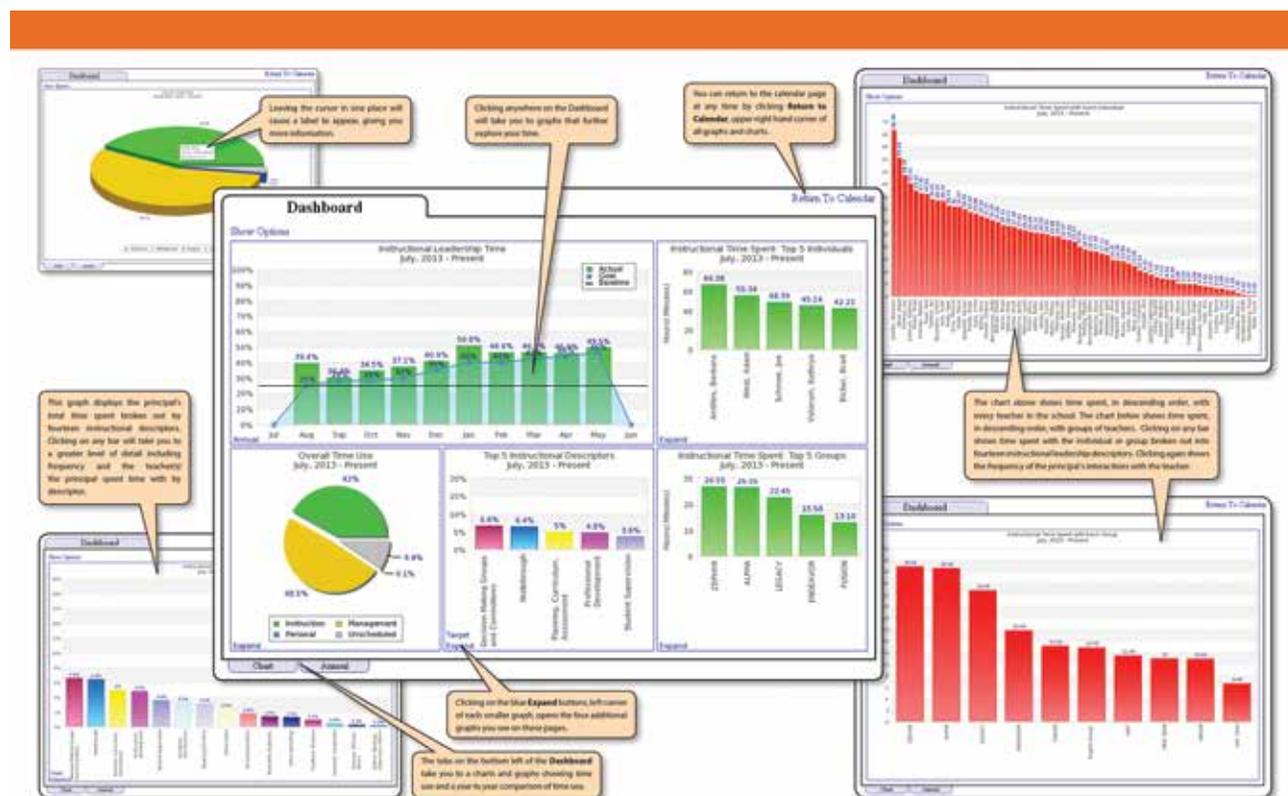
## MLDS Engagement Platforms and Treatments for LE 6

Make Time for Instructional Leadership: How effective administrators can succeed at both school management and instructional leadership.

### Treatment 1: Examining Principal Time Use (approximate time allotment: 45 minutes) Engagement Platforms: Regional Meetings, Coaching and Mentoring

As principals begin to think and reflect on how their time allocation decisions affect school outcomes, it is helpful, at first, to depersonalize the issue. This treatment asks principals to examine other, anonymous principals' time allocation data and make inferences about how those principal's decisions might be affecting their school outcomes. This examination of other principals' decisions helps to establish the cause-effect link between time allocation and school success.

**EXERCISE:** Consider a principal's time allocation data by examining this data as collected by TimeTrack, a statistical tool used in the School Administration Manager (SAM) project.



Respond to the following discussion prompts:

- Which teacher does this principal spend the most time with? Which teacher the least? What might be the reason for the difference?
- Why is it important for principals to spend time with teams of teachers in addition to one teacher at a time?
- Which leadership activity does this principal engage in the most that supports high-quality instruction and student learning?
- How does the principal's time spent on leadership activities that support high-quality instruction and student learning compare to the amount of time they spend on leadership activities that support management?
- Is this principal achieving the goal they have set for themselves for the amount of time spent on leadership activities supporting high-quality instruction and student learning?

Based on this data, what general conclusions might you draw about this principal as an instructional leader? How would this principal compare to you as the instructional leader of your school.



## **Treatment 2: Gather Data on Administrators' Time Use**

(approximate time allotment: 30 days for data collection; 60 minutes for reflection/debriefing)

### **Engagement Platforms: Coaching and Mentoring**

**EXERCISE:** With the support of a coach or mentor, develop a way to informally gather data on one's own time allocation decisions. Track this data for 30 days.

After the data is gathered and displayed, discuss the results with a coach or mentor. Use the following prompts:

- Were you able to track the amount of time you spent working with the teachers in your school?
- Which teacher did you spend the most time with? Which teacher the least? What was the reason for the difference?
- Did you spend time with teams of teachers?
- Were you able to determine a particular leadership activity that supports high-quality instructional and student learning that you engaged in the most?
- How did the amount of time you spent on instructionally related leadership activities compare to the amount of time you spent on management related leadership activities?
- If you could change something about your data, what would you like to change? Why would you want to change it?

## **Treatment 3: Identifying and Implementing First Responders (Part A)**

(approximate time allotment: 45 minutes)

### **Engagement Platforms: Coaching and Mentoring**

First responders are members of the school staff that can be called on to step in and handle specific management issues as they arise, freeing the school principal to remain engaged in activities designed to improve teaching and learning. The mentor/coach supports the school administrator in doing the following:

- Identify 5 management tasks that could be initially addressed by a designated first responder.
- Identify specific people on staff who could serve as the first responder for each of the identified tasks.
- Develop a process for training each first responder for effectively addressing the management task for which they are responsible.

## **Treatment 3: Identifying and Implementing First Responders (Part B)**

(approximate time allotment: 45 minutes)

### **Engagement Platforms: Coaching and Mentoring**

Administrators, with support from a mentor/coach, puts into motion the process of having first responders initially address particular management issues. During treatment 3B, The mentor/coach discusses the following with the school administrator:

- How is the first responder process working? What is working well? What could be working better?
- How much additional time did this free up in your schedule? How did you spend this additional time?
- For what other managerial tasks in your school might you be able to develop first responders?
- How much impact do you think you had redeploying this additional time?



# Missouri Leadership Development System (MLDS)

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**MLDS Emerging Level Competencies****The Emerging Principal****Visionary Leader**

at the Emerging Level

1. Examines and attempts to understand the existing core values and culture of the school and how it connects to the mission and vision (PSEL 1a,b,d,e; 5f; 7c; 10c)
2. Examines how the mission, vision and core values are communicated to, and supported by, stakeholders (PSEL 1c,d,f,g; 5f; 8c,h; 9l)
3. Examines the sources of data used to evaluate the existing mission, vision and core values (PSEL 1d,e; 4a; 6e; 9a; 10a,b,g)

**Instructional Leader**

at the Emerging Level

4. Examines and becomes familiar with the existing curriculum and learning standards (PSEL 4a,b; 6d; 9i; 10a,e)
5. Identifies existing instructional practices and reinforces those that are appropriate to the learning content (PSEL 2b; 4b,c,d,e; 6d,e; 10a,f)
6. Observes classroom instruction and provides meaningful and timely feedback to build teacher practice and student response (PSEL 2b; 4b,d; 6a,e,f; 10c,e,f)
7. Assesses teachers' understanding and use of formative and summative assessments and their relationship to student learning (PSEL 4a,b,f; 6d)
8. Assesses current teacher analysis of student level data for improving the instructional process (PSEL 2c; 3a; 4b,g; 6e; 7g; 9g; 10a,c,e,g,h)
9. Uses data from multiple sources to identify strengths and needs for professional learning (PSEL 6a,c,d,f,h; 7a,f,g,h; 10a,e,f,g)

**Managerial Leader**

at the Emerging Level

10. Analyzes the immediate and long-term needs for building and sustaining a safe and functional school (PSEL 2a; 5a,c; 8g; 9e; 10h)
11. Analyzes routines, instruction, procedures and schedules for building and sustaining a safe, healthy, orderly and compliant learning environment (PSEL 3d,e; 5a,c,e; 9a,e,f,h,j; 10a)
12. Analyzes personnel to determine areas of strength and need (PSEL 6a,b; 9b; 10a)
13. Determines the effectiveness of existing expectations, guidelines and procedures (PSEL 2a,d,f; 4a; 7a,c; 9b,h; 10a,f)
14. Assesses and reviews data to determine appropriate interventions and support for personnel (PSEL 6a,b,c,h; 9k; 10f)
15. Understands and complies with district, state and federal requirements for records and reporting (PSEL 9h)
16. Assesses how current fiscal resources support school goals and priorities and determines compliance with district, state and federal requirements (PSEL 2a; 5c; 8j; 9a,b,c,d,h)
17. Assesses how current non-fiscal resources support school goals and priorities and determines compliance with district, state and federal requirements (PSEL 2a; 5c; 8j; 9a,b,c,d,h)



## MLDS Emerging Level Competencies

### The Emerging Principal

#### **Relational Leader** at the Emerging Level

18. Determines how to analyze the extent of diversity in the school based on ethnicity, gender, economic background, etc. (PSEL 1c; 2d,e; 3a,b,c,e,f; 4a; 5b; 7b,d; 10a,c)
19. Determines how resources and strategies in the school community are used for addressing the overall well-being of each student (PSEL 2c,e,f; 3a,b,c,d,f,h; 5b; 8e,g,l; 10a)
20. Builds relationships with students and establishes high expectations for behavior and learning to promote a positive culture (PSEL 2e; 3a,b,d; 5b,d,e)
21. Intentionally interacts with staff by being visible, accessible and approachable (PSEL 2a,e,f; 7e; 9j)
22. Analyzes the culture of support and respect among staff and determines strengths and opportunities for improvement (PSEL 2b,d,e,f; 3g,h; 6h; 7a,b,c,d,e,g; 9k; 10a,d,f)
23. Identifies potential teacher leaders (PSEL 6g; 7b,d,h; 10a,e,j)
24. Creates formal and informal opportunities to interact with families (PSEL 2d; 3a,h; 5d,f; 8a,b,c,d,g; 10a)
25. Identifies key stakeholders in the community and begins to build relationships (PSEL 3f; 5d,f; 8a,b,c,d,f,g,j; 10c)

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#### **Innovative Leader** at the Emerging Level

26. Observes and gathers knowledge, skills and best practices relevant to teaching and learning in the school (PSEL 4c,e; 6f; 10a,c,f,i)
27. Engages in professional networks to expand relationships and generate avenues for new knowledge and understanding (PSEL 6i; 10g)
28. Begins reflecting on experiences of being a new principal, personal strengths and weaknesses and takes some action to grow and develop (PSEL 2b; 6i; 10c,g,h)
29. Demonstrates receptivity and generates a plan for receiving constructive feedback from others (PSEL 6i; 10c,g,h)
30. Begins applying time management practices to allow focus on the school's highest priorities (PSEL 6i)
31. Acts in accordance with the belief that a principal's primary role is to promote student learning (PSEL 2a; 3g,h; 7f; 8h; 9f; 10d,i)
32. Explores existing circumstances related to student learning & considers possible areas for change (PSEL 2b; 3f; 7f; 8j; 9f; 10d,e,i)



**Professional Standards for Educational Leaders  
(PSEL)**

# Professional Standards for Educational Leaders

National Policy Board for Educational Administration

# 2015

October 2015

formerly known as ISLLC Standards

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