OBSERVATION OF HQPD TRAINING AND COACHING MATERIALS

Missouri Collaborative Work/State Personnel Development Grant (2014)

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Observation Checklist for
High-Quality Professional Development Training

The *Observation Checklist for High Quality Professional Development*[1] was designed to be completed by an observer to determine the level of quality of professional development training. It can also be used to provide ongoing feedback and coaching to peers who provide professional development training. Furthermore, it can be used as a guidance document when designing or revising professional development. The tool represents a compilation of research-identified indicators that should be present in high quality professional development. Professional development training with a maximum of one item missed per domain on the checklist can be considered high quality.

Context Information

Observer:	**Date:**
# of Participants:	**RPDC:**
Event Location *(circle one)*: Regional / On-site	**Building:**
Duration *(circle one)*: Less than ½ day / ½ day / Full day	**Topic** *(circle one)*: Collaborative Data Teams Effective Teaching/Learning Practices *Assessment-Capable Learners* *Feedback* *Reciprocal Teaching* *Spaced vs. Massed* Common Formative Assessment Data-Based Decision Making
Presenter(s) *(please list)*:	

The professional development provider:	**Observed?** **(Check if Yes)**
Preparation	
1. Provides a description of the training with learning objectives prior to training	
Evidence or example:	
2. Provides readings, activities, and/or questions to think about prior to the training	
Evidence or example:	

[1] Noonan, P., Langham, A., & Gaumer Erickson, A. (2013). *Observation checklist for high-quality professional development in education*. Center for Research on Learning, University of Kansas, Lawrence, Kansas.

The professional development provider:	Observed? (Check if Yes)
3. Provides an agenda (i.e., schedule of topics to be presented and times) before or at the beginning of the training	
Evidence or example:	
4. Quickly establishes or builds on previously established rapport with participants	
Evidence or example:	
Introduction	
5. Connects the topic to participants' context (e.g., community, school, district)	
Evidence or example:	
6. Includes the empirical research foundation of the content (e.g., citations, verbal references to research literature, key researchers)	
Evidence or example:	
7. Content builds on or relates to participants' previous professional development	
Evidence or example:	
8. Aligns with school/district/state/federal standards or goals	
Evidence or example:	
9. Emphasizes impact of content on student learning outcomes	
Evidence or example:	
Demonstration	
10. Builds shared vocabulary required to implement and sustain the practice	
Evidence or example:	
11. Provides examples of the content/practice in use (e.g., case study, vignette)	
Evidence or example:	

The professional development provider:	Observed? (Check if Yes)
12. Illustrates the applicability of the material, knowledge, or practice to the participants' context	
Evidence or example:	
Engagement	
13. Includes opportunities for participants to practice and/or rehearse new skills	
Evidence or example:	
14. Includes opportunities for participants to express personal perspectives (e.g., experiences, thoughts on concept)	
Evidence or example:	
15. Includes opportunities for participants to interact with each other related to training content	
Evidence or example:	
16. Adheres to agenda and time constraints	
Evidence or example:	
Evaluation	
17. Includes opportunities for participants to reflect on learning	
Evidence or example:	
18. Includes discussion of specific indicators—related to the knowledge, material, or skills provided by the training—that would indicate a successful transfer to practice	
Evidence or example:	
19. Engages participants in assessment of their acquisition of knowledge and skills	
Evidence or example:	

Mastery	
20. Details follow-up activities that require participants to apply their learning in a new setting or context	
Evidence or example:	
21. Offers opportunities for continued learning through technical assistance and resources	
Evidence or example:	
22. Describes opportunities for coaching to improve fidelity of implementation	
Evidence or example:	

References

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Shared Understandings Document: Training Checklist

State Implementation Specialist Calibration Tool*

Below please find an amended Shared Understandings Document (April 2014) to align with the Observation of High Quality Training Checklist (2013).

This document is designed to help establish consistency in ratings as well as to assist in clarifying the prompts for the Regional Implementation Coach. Please become familiar with the examples provided. It is extremely important each prompt is interpreted in a similar manner by all observers.

*** Shared Understanding is an ever-changing document. This document will be revised as needed through an on-going collaboration with UMKC/KU/MT and State Implementation Specialists*.

SHARED UNDERSTANDINGS: HQPD TRAINING CHECKLIST

1. Demographic (Context) information prompted on the new HQPD checklist will provide descriptive data to inform the SPDG.
   Specific definitions:
   NUMBER OF PARTICIPANTS: Indicates rough head count. If available, attach a copy of the sign-in sheet where role of attendee and building information will be available.
   ONSITE: Defined as any training that takes place within a building that may include only participants from that specific building or from another building WITHIN that district.
   REGIONAL: Defined as any training in a district which participants represent buildings OUTSIDE of the hosting school district OR as trainings that occur outside the district even if participants in the training all represent one building or district. Regional training MAY be for only one building or for buildings from different schools. (PURPOSE: This data may be used to inform future program needs in terms of time, travel, etc.)
   DURATION: Full day: more than 6 hrs. ½ day: 3 – 6 hrs. Less than ½ day: less than 3 hrs.
   PRESENTER(s): If a team is presenting, please list all consultants actively engaged.
   BUILDING(s): List all buildings represented. If participants represent more than one building, include District information for clarity.
2. Item #1: What is meant by “Prior” – Prior could be any time before the content of the training is addressed, e.g., pre-assessments, setting the stage activities that happen the day of the training OR pre-readings, pre-assessment etc. that happen for the participant before they arrive at the training.
3. Item #1: What is meant by “Learning Objective”...it is not necessary to for presenter to use terminology of “objective” to receive a YES. He/She may use outcomes, essential learnings, etc. Is the intended learning identified? If so, this item is marked YES.
4. Item #3: Agenda reference – ANY form of information provided that describes for the participant the flow of the day… can be separate document provided as part of information sent out before training day, handed out as part of PowerPoint and other information at registration/sign-in or contained within a slide in the PowerPoint. It is about meeting the INTENT of keeping participants informed NOT about a specific format.

5. Item # 4: Evidence of “Rapport”: Evidence can be found in body language of participant and presenter, tone of voice, use of humor, etc. Also, evidence can be found in actions and activities that build or encourage or elicits emotive responses from participants
6. ITEM #12: For our purposes “Context” refers to school/building NOT to grade level or subject areas.
7. Item # 14: Represents opportunities for ***personal perspectives***….. presenter might say, “what do you believe”, “how does this align with your present practice or not .” Parking lot type activities where participant is encouraged to share personal questions might be observed.
8. Item #15: Represent opportunities for ***interaction around content***…. Examples might be: Talk to your shoulder partner about the following definitions, jig-saw activities, etc. where conversations are about specific content
9. Comments: The comments we note on the HQPD form many serve multiple functions.
    a. 1. Any comment noted on the HQPD form will be catalogued to serve as an evidence bank of sorts that identifies specific types of actions/artifacts that we as SIS might find that allows us to mark YES on a specific indicator.
    b. The comments can be used during coaching sessions to provide support for feedback on a specific indicator. Remember that feedback conversations are to provide specific information around which actions can be developed and inform the consultant as to the opportunity for change in practice.
    c. HQPD checklist data will be shared with consultant through hard-copies PRIOR to online data system becoming active. Once the online tool is active each consultant may access the observation notes prior to feedback session. Each SIS may need to develop a communication system for their consultants to address the access of HQPD observation results prior to feedback session. If we frame our procedures respecting the intent of this practice to provide consultants time to reflect on our observations prior to feedback, the manner in which this communication occurs prior to the online tool being available can be somewhat personalized for each SIS. (Remember: Each consultant is asked to complete the HQPD Checklist on their session prior to feedback conversation with SIS. The tool **may be** used to check for essential elements during planning and prior to delivery.)
10. Clarity on the “internal coaching” checklist that has yet to be developed. Our mental model at this time is that there will be a tool developed collaboratively with UMKC/KU/MT to guide the SIS’s observation of internal coaching that occurs between RPDC/Internal Coach / School Teams. Secondly that as SIS we will develop a ‘FEEDBACK GUIDE” to align the conversations we have as we debrief the consultants around events/trainings we observe. The “FEEDBACK GUIDE” would provide us a way to document our conversations, set next steps/action plans etc.

SHARED UNDERSTANDINGS ON PROCESS:

HQPD CONTENT MANAGEMENT: SIS

1. HQPD Checklist observation data will be collected
2. Feedback/coaching will be provided to consultants in a timely manner (within 3 weeks) after each observation. (Minimum expectation: two required training and the two required coaching observations for each consultant delivering CW PD.)
3. Feedback Guide Documents: May be used to frame conversations with consultants in all RPDCs to facilitate the SIS in retaining information for future conversations and follow-up opportunities.

HQPD CONTENT MANGEMENT:

Data Submitted to UMKC:

1. Until online format is operational, SIS will submit data upon completion of each HQPD checklist. Quantitative and qualitative data will inform HQPD.
   a. Quantitative data to be reported includes the following: (requested on HQPD Checklist)
      i. RPDC
      ii. # of Participants
      iii. Event location: Regional / On-site
      iv. Topic: Data Teams, FA, EP, CW etc.
      v. Time Frame: full day, ½ day or less than ½ day
      vi. Presenter (s)): (Please list)
   b. Qualitative data to be reported
      i. Notes that accompanied the HQPD checklist to provide evidence of descriptor and support feedback/coaching will be reported

Data to be provided RPDC Directors: **(THIS IS MANAGED BY UMKC/KC/MT)**

1. Collective data will be provided to RPDC Directors twice a year (mid-year/ year- end) to represent patterns / findings from completion of HQPD checklist on events within their specific region.
   a. Collective data reported to RPDC Directors
      i. # of participants served
      ii. # of trainings by event location (onsite/regional)
      iii. # of trainings by topic
      iv. # of events by time frame
      v. Summary findings on each indicator within the checklist (i.e. item 1 – present 11/11 observations etc.)

Observation Checklist for High-Quality Regional Implementation Coaching

WORKING VERSION (November 2013)

Instructions: This checklist is designed to be completed by an observer to determine the quality of regional implementation coaching. This checklist can also be used for self-assessment of fidelity. Fidelity should be monitored "early and often" (Harn, Parisi, & Stoolmiller, 2013). This checklist is a companion to the *Observation Checklist for High Quality Professional Development Training*. The criteria or threshold for fidelity as measured on this checklist is 11 out of 12 items reported to be observed.

State Implementation Specialist (observer):	**Date:**
Coaching Participants	
RPDC:	**CW Building:**
Regional Implementation Coach(es): *(please list)*:	**Recipient(s) of Coaching** *(circle all that apply):* *Classroom teacher* *Collaborative team* *Building administrator*
Location & Duration	
Coaching Location *(circle one)*: Regional / On-site	**Duration** *(circle one)*: <1 hour 1-2 hours > 2 hours
Topic *(circle all that apply)*:	
Collaborative Work Overview	Effective Teaching/Learning Practices
Collaborative Data Teams	*Assessment-Capable Learners*
Common Formative Assessment	*Reciprocal Teaching*
Data-Based Decision Making	*Spaced vs. Massed Practice*
School-based Implementation Coaching	*Feedback*

The regional implementation coach:	**Observed?** **(Check if Yes)**
Preparation	
1. Clarifies purpose and scope of the coaching session.	
Evidence or example:	
2. Builds and maintains rapport, collegiality and confidentiality with participants.	
Evidence or example:	
Feedback & Solution Dialogue	
3. Facilitates conversation about what has gone well and where more support is needed.	
Evidence or example:	
4. Facilitates conversation about relevant student learning and behavior data.	

The regional implementation coach:	Observed? (Check if Yes)
Evidence or example:	
5. Responds to ideas for improvement by validating and/or adding suggestions for changes in practice.	
Evidence or example:	
6. Provides rationales for why changes are important and how changes will improve outcomes.	
Evidence or example:	
7. Provides opportunity for reflection and clarification of recommendations.	
Evidence or example:	
8. Supports suggestions for change in practice with examples of the content/practice in use.	
Evidence or example:	
9. Offers opportunity or resources for guided practice.	
Evidence or example:	
10. Facilitates identifying next steps from the coaching session.	
Evidence or example:	
Structure	
11. Paces the conversation to allow time for questioning and processing of information.	
Evidence or example:	
12. Adheres to established plan of coaching (e.g., frequency, schedule, and duration).	
Evidence or example:	
Total	

Additional Notes:

Shared Understandings Document: Coaching Checklist

State Implementation Specialist Calibration Tool*

Below please find an amended Shared Understandings Document (April 2014) to align with the Observation of High Quality Coaching Checklist (December 2013).

This document is designed to help establish consistency in ratings as well as to assist in clarifying the prompts for the Regional Implementation Coach. Please become familiar with the examples provided. It is extremely important each prompt is interpreted in a similar manner by all observers.

** Shared Understanding is an ever-changing document. This document will be revised as needed through an on-going collaboration with UMKC/KU/MT and State Implementation Specialists*.

THE REGIONAL IMPLEMENTATION COACH:

Preparation

Item #1: Clarifies purpose and scope of the coaching session.

The expectation of this prompt is grounded in the act of coaching being a collaborative reciprocal relationship.

EXAMPLES: To meet this expectation you might hear language such as

"We are meeting today to…. What would you think we should focus on during our work today? Here is what I see as our purpose for today's conversation, what are your thoughts?"

"In your e-mail, phone call or when we talked during last week's meeting, you said you wanted me to look at a CFA that you developed."

Language to infer the participant is knowledgeable and will be an active participant in the process.

Item #2: Builds and maintains rapport, collegiality and confidentiality with participants.

This is the relationship prompt. You might hear "friendly language, topics not specifically related to the work, warm and open body language (smiling, joking etc.)

In consideration of a group not liking what the consultant has to say to them and pushing-back or being confrontational: Data recorders (SISs) will watch and listen to the interaction, and if the consultant tries to establish or build rapport, it will be documented in the evidence section on the checklist. Although the group may not like everything they hear from a consultant, it will be rare that rapport will not be established.

Feedback and Solution Dialogue

The prompts in this section of the checklist are listed in a sequential manner, suggesting that a coaching session has a somewhat formal structure and essential elements to be addressed.

A skilled coach will address the intent of the prompts without specifically restating the prompt or allowing the sequential nature of the prompts to set the tone as one of interrogation or that the coaching conversation is merely one of going down a checklist

Item #3: Facilitates conversation about what has gone well <u>and</u> where more support is needed.

Our caution with this two-part item is to ensure both elements of the items are evidenced.

Example: "What went well: "Teachers were positive and re-wrote CFA items that require higher order thinking skills from students."

"Is there an area in which you need more support?" Teachers: "…having time issues when teaching conceptual understandings."

"Teachers appear to be skilled at writing CFAs that require students to process thoughts at higher levels. So my next session will focus on…."

Item #4: Facilitates conversation about relevant student learning and behavior data.

Did you see or hear references to student learning and (and/or) data and its use by the coaching recipient(s). Did the coach then reference the data in the coaching conversation around what the teacher may have done to facilitate learning, e.g., use of specific practice. (Did you hear "The students did …. ~~A~~long with "I/we did statements" It is not just about adult behavior, but the adult behavior being viewed as an antecedent to change/influence on student learning/behavior.)

Example: "What is the data telling you?" "In looking at the student CFA data what conclusions do you draw as to what you need to do next?" " I see the post-test data on the unit of instruction shows a decrease as opposed to an increase in the scores of the students. What do you think might be influencing the data?" " I noticed you indicated (instructional method) was employed in the teaching of XXYZ skills. How did the students respond to this practice?"

"Can you think of anything regarding your instructional method that might help us better understand these scores (outcomes)" "I noticed that the Data Team was receiving CFA data when the team meeting started? What is getting in the way of the data being submitted in time to allow it to be copied and distributed to all Data Team members? What did you notice about how the team worked that you think supports quality Data Team practices? Did you notice anything that may be impeding the work of the team and If so what might help?"

"Remember when we looked at the team functioning survey, we found that we were weaker in team member communication than in other areas. How can we use that data to problem solve further some strategies to strengthen our collaborative team work?"

"What was your movement on the practice profile for the CFA package when your team assessed current status? What strategies or practices contribute to that movement? Let's talk further about how to close the gap between where we are and where we want to go."

"As you reviewed your SMART goal for this quarter, how did you utilize that data to pinpoint your focus with this practice?"

Item #5: Responds to ideas for improvement by validating and/or adding suggestions for changes in practice.

May often hear evidence of both indicators somewhat simultaneously, although the implementation query could happen independently. It may be reflective in nature guiding the participants to a conclusion or more directive depending on the context, consultant, etc. Does the coach connect results to implementation?

Example: "This is what I saw happening……" "What if you tried…"

"You said that you are looking at fidelity in your use of (instructional practice) and whether fidelity may be a direct result of a decrease seen in your students' scores."

"You stated that ______ has been a cause for data being submitted late and ____ will be done to assist teachers in having data prepared in advance in order for all team members to have the opportunity to examine prior to the meeting."

Item #6: Provides rationales for why changes are important <u>and</u> how changes will improve outcomes.

Indicators in Feedback and Solution Dialogue section embody the solution-orientation of the coaching work. It isn't only about identifying the issue/challenge, but about providing opportunities for the coaching recipient(s) to brainstorm and identify possible solutions, followed by the reinforcing support of the coach in honoring their possible solutions and expanding on the ideas as appropriate.

Example: "Lack of fidelity in the use of (instructional practice) can certainly be a contributor to lack of student progress. Your plan to improve your fidelity of instruction using (instructional practice) sounds like a good start. Research indicates that (instructional practice) will improve student learning, however, the practice will not show the improvement you are looking for without focusing on fidelity of the instruction."

Item # 7: Provides opportunity for reflection and clarification of recommendations.

Evidence of this coaching practice may be embedded in the conversational stream. Again the expectation is not that each prompt be a stand-alone discrete action or item.

Example: "I hope I have been clear in that you understand I am not suggesting additional work, just that the work to be done prior to team meetings become intentional through the use of reminders, calendar prompts…however you think would work best knowing ….. What do you think? "

Item #8: Supports suggestions for change in practice with examples of content/practice in use.

Examples of content/practice in use may be from consultant or participant.

Example: "So it has been suggested to improve student learning as measured by our CFA. You will not change the number of practice activities, so no additional prep is needed. You will have students complete a practice activity every other day for two weeks. You said, "had success with this spacing out of the practice opportunities when you were working with the stages of a butterfly ….."

"Having an agenda with time limits set for each item for your team meetings was suggested to keep the meeting on track. Having an agenda is identified as a critical component of effective team functioning, and using the agenda to manage your time sounds great. I will be anxious to hear how it worked for you."

"You will increase the fidelity of the (instructional practice) which research indicates is an effective practice to improve student learning."

Item # 9: Offers opportunity or resources for guided practice.

"Let's think about what the agenda might look like." "Let's outline your next agenda."

Consultant reviews a "tuning protocol" with teachers. The protocol outlines steps to writing quality CFAs. Teachers then use tuning protocol with CFA they have written. Consultant suggests additional resources with example tuning protocols to assist teachers in writing quality CFAs.

Item #10: Facilitates identifying next steps from the coaching session.

Examples: Coach says…."What are reasonable next steps? We've scheduled time to touch-base every other week. So over the next 2 weeks, what are some ideas you'd like to try out in your classroom?"

"Let's write down the plan for next steps. This will help us both remember. Are there ways I can support you before our next meeting/feedback session? Sometimes it is helpful to get an email reminder about next steps. Would that be helpful for you?"

<u>Structure</u>

This section assists the coach in time management and in organizing events through goal oriented planning.

Item #11: Paces the conversation to allow time for questioning and processing of information

Did coaching participants have time to complete designed tasks? Did coach refer to time as an obstacle? Did coaching session exhibit most if not all of the elements on the checklist?

Item # 12: Adheres to established plan of coaching (e.g., frequency, schedule, and duration.)

It is important for both parties to be aware of the plan for supporting performance and conscious of the time delay between feedback sessions. Some of the script below touches on this.

Example: At the end of the session, the coach may say, "It is a pleasure to work with you. Please feel free to email or call with questions that come up before our next meeting. As we work together, it is helpful to look at our calendar of feedback sessions, just to make sure the dates and times still work, but also to make sure I'm observing the teaching you want me to observe. I know often classroom schedules need to flexible. So with each session, I want to be sure we touch base on the schedule. Our next date and time is [insert date/time]. Does this still work for you?"

SIS Conference Guide
Reflection/Evidence/Action – Change in Educator Practice

HQPD/Coaching Observed Event:

Date of Event: **Location of Event:** **Consultant(s):**

Date of SIS Conference:

Method: **In-Person** **Technology Assisted:** **Virtual __________** **Email** **Phone**

T = Task Feedback P = Process Feedback S = Self-regulation Feedback

Objective questions (Uncover facts as needed: who, what, when, where, how?)

T Who attended the session? team, grade level, all faculty, etc.
T How many teachers/administrators were present?
T Was the session a complete/partial training?
P What, if anything, did you do differently if this was not the first time to present/coach?
T What was the teachers'/administrator's goal for the session?

Reflective questions (Access presenter's perspective/ feeling: What did you, as the presenter, like/dislike about the training? *Why*?)

P-S What do you think was the most valuable part of the session? Why?
T Was there anything out of the ordinary during the session?
P-P-S What was the most challenging part of the preparation? Delivery? Why?
P-P-S How did you address the challenge(s)? Were you successful? How do you know?
P-S What was the highlight for you? Why?
T-S Do you think the participants learned what you intended? How do you know?
T-S Have you reviewed the pre/post survey questions? What do you think of the results?
P How do you think the teachers will apply information from this session in their classrooms?
T-S What areas do you think require follow-up? Why?
P-S What do you believe was the most significant take-away for participants? Consultant?

Interpretive questions (Engage in analytical thinking around: behaviors/actions/outcomes *using evidence* to support perceptions.)

P What should we celebrate after reflecting on the session?
T-S Did you accomplish your goal(s) for the session? How do you know?
T-S Did you accomplish the teachers'/administrator's goal(s) for the session? How do you know?
P or S What would you say about this session to another consultant?
S What are some things you might want to consider before another presentation/coaching event?
S-S What would you do differently or change for the next session? Why?
S-S What, if any, instructional decisions did you make during the session, based on participant needs?
Please explain your rationale.

Decisional questions (Articulate *decisions/actions*: Now What?)

S What will you use this information in preparation of the next session?

S-S What are your proposed goals or next steps? How would you prioritize these steps?

S What is your action plan for moving forward?

P What supports/resources will you need to fulfill your action plan?

S What information would you like to share with another consultant?