WISCONSIN COACH EVALUATION SYSTEM

USER GUIDE FOR COACHES AND EVALUATORS

Wisconsin Department of Public Instruction
Carolyn Stanford Taylor, State Superintendent

WISCONSIN COACH EVALUATION SYSTEM

User Guide for Coaches and Evaluators

Developed by

Rachel Fregien
Education Consultant for Coaching Supports
Special Education, Department of Public Instruction

Joseph Kanke
Statewide Coaching Coordinator
Cooperative Educational Services Agency 2

Laura Ruckert
Education Consultant
Educator Development and Support, Department of Public Instruction

Jen Breezee
Instructional Coaching Specialist
PLACE: Professional Learning and Community Education
UW-Madison School of Education

Wisconsin Department of Public Instruction

Carolyn Stanford Taylor, State Superintendent
Madison, Wisconsin

This publication is available from:

Special Education Team
Wisconsin Department of Public Instruction
125 South Webster Street
Madison, WI 53703

(608) 266-1781
https://dpi.wi.gov/sped

July 2020 Wisconsin Department of Public Instruction

Table of Contents

Introduction

This Wisconsin Coach Evaluation User Guide reflects the combined efforts of Wisconsin (WI) educators, Cooperative Educational Support Agencies (CESAs), the Department of Public Instruction (DPI) Educator Development and Support Team, the Wisconsin Statewide Coaching Collaborative Partners, and the University of Wisconsin-Madison Office of Professional Learning and Community Education in the School of Education. Coaches, coach supervisors, and peer coaches can draw upon the following four sections of the user guide to plan and conduct learning-centered evaluations:

- The first section briefly describes the five principles of Wisconsin's learning-centered evaluation approach.
- The second section provides an overview of the Wisconsin Coach Evaluation Rubric and key evaluation process milestones.
- The third section illustrates how to leverage the evaluation process as a cycle of continuous improvement across the year.
- The last section summarizes how to use the end-of-cycle conversation to plan for the coming year and move professional growth forward.

The guide's four main sections provide a foundational understanding of Wisconsin's Coach Evaluation System and readers can access additional, deeper learning opportunities in the appendices. Districts should augment this guide with additional local, regional, or state professional development and training opportunities to continuously improve the quality and efficacy of evaluation processes.

Five Principles of Wisconsin's Learning-Centered Evaluation Approach

Evaluation systems, implemented in isolation as an accountability or compliance exercise, will not improve coaching practice. Coach evaluations have the greatest potential to improve coach practice when all conditions are in place:

1. A foundation of trust that encourages coaches to take risks and learn from mistakes,
2. A common, research-based framework on effective coaching practice,
3. Regular application of coach-developed goals based on data,
4. Cycles of continuous improvement guided by timely and specific feedback through ongoing collaboration, and
5. Integration of evaluation processes within school and district improvement strategies.

Creating and maintaining these conditions help move an evaluation system from a bureaucratic exercise to a learning-centered, continuous improvement process.

Foundation of Trust

Conditions of trust are critical in a learning-centered evaluation approach. Effective school leaders develop and maintain trust among coaches, administrators, teachers, students, and parents. In the evaluation context, creating conditions of trust first occurs during an orientation session, where coaches and their evaluators discuss the following items with transparency:

- the evaluation criteria, or what rubric the evaluator will use to evaluate the coach,
- the evaluation process, or how and when the evaluator will observe the coach's practice,
- the use of evaluation results, and
- any remaining questions or concerns.

The evaluator peer coach plays a key role in building a foundation of trust. Evaluators should encourage coaches to stretch themselves in ways that foster professional growth. No one should settle for an expedient route using easily achieved goals. Setting rigorous goals for their practice will result in greater learning for coaches. The evaluator encourages this process by reinforcing that learning happens through struggles and mistakes as well as successes and that these instances will not be punitive, but rather opportunities for learning. Evaluators can cultivate a growth mindset through open conversations that help coaches build on strengths and learn from mistakes.

A Common, Research-Based Framework

Wisconsin developed the Wisconsin Coach Evaluation Rubric based on the state's research-based foundational coaching document, the Coaching Competency Practice Profile (CCPP) because:

- the practice profile describes the essential functions that allow coaching to be teachable, learnable, and doable in educational settings;
- research supports and validates the CCPP; and
- state and regional educational partners are aligning professional growth supports for coaches to the CCPP.

The Coach Evaluation Rubric (see Appendix B), a four-level rubric, helps coaches identify their typical, current practice and map a path for growth based on reflection.

Data-Driven, Coach-Developed Goals

As active participants in their own evaluations, coaches set performance goals based on analyses of client and program data, as well as assessments of their own practice using the Wisconsin Coach Evaluation Rubric. These goals address client or coaching program priorities (referred to as the Client or Program Outcomes Goal) and self-identified needs for individual improvement (referred to as the Professional Practice Goal). The goals may have the most impact when they are connected and mutually reinforcing (e.g., "I will ____ so that clients can ____"). Evaluators, peers, school staff, and other stakeholders can provide information relevant to the goals and feedback to strengthen them.

Continuous Improvement Supported by Professional Conversations

A learning-centered approach facilitates ongoing improvement through regularly repeated continuous improvement cycles. Improvement cycles represent intentional instruction that involves goal-setting and collection of evidence related to goals, reflection, and revision. Some refer to this type of work as a Plan-Do-Study-Act or Plan-Do-Check-Act process. Each step in a continuous improvement cycle should seamlessly connect to the next step and be repeated as needed.

Professional conversations (i.e., coaching and timely feedback from trained evaluators/peer coaches) strengthen continuous improvement cycles. With effective training, evaluators/peer coaches can establish a shared understanding and common language regarding best practice, as well as ensure consistent and accurate use of the Coach Evaluation Rubric when selecting evidence, identifying levels of practice, and facilitating professional conversations to move coaching practice forward.

Integration with District and School Priorities

Self-identified goals based on rigorous data analyses help personalize the improvement process and create ownership of the results. The improvement process becomes strategic when it also aligns with identified school and district priorities. Many districts have intentionally restructured professional learning opportunities to build on linkages between the learning of teachers and administrators. For example, Hortonville Public School District has committed to a coaching program centered on inclusive classrooms. In an article on the Hortonville Area School District's inclusion efforts, Statewide Coaching Coordinator Joseph Kanke quotes a district special education guidance document when he states that, "the purpose of an inclusion coach is part of the continuum of services, 'to facilitate, empower and educate in order to create a least restrictive environment in which there is flexibility and ownership by staff to ensure ALL students learn at the highest level'" (Kanke 2020; Hortonville Area School District, n.d.). Educators and coaches align their goals to the district vision.

Example

A principal and leadership team have identified inclusive classrooms as a goal for the school. Coaches in that school or district would develop their CPO based on coaching educators on incorporating instructional strategies that create the least restrictive environment, and utilize common look-fors or a rubric in assessing progress. This helps coaches with their goals and the school with an overarching goal.

Coach Evaluation Overview

The Wisconsin Coach Evaluation System is an optional professional evaluation system created by and for Wisconsin's instructional coaches and is parallel to the Wisconsin Educator Effectiveness (EE) System in format and rigor. The systems are aligned to provide consistency for evaluators while offering specificity for the profession of coaching. The similarities between coaching and teacher evaluations are presented in Table 1.

Table 1: Similarities between the Coach Evaluation and the EE Teacher System Processes.

Coaching Professional Evaluation Cycle	Educator Effectiveness Evaluation Cycle
Self-review based on coaching state standards (Coach Evaluation Rubric)	Self-review based on teaching standards
Professional Practice Goal (PPG)	Professional Practice Goal (PPG)
Client or Program Outcomes (CPO)	Student/School Learning Objectives (SLOs)
Evidence collection	Evidence collection
Observations (announced only)	Observations (announced and unannounced)
Professional conversations and feedback	Professional conversations and feedback
Goal review and assessment	Goal review and assessment
Measures of professional practice goals (PPG) and client or program outcomes (CPOs)	Measures of professional practice goals (PPG) and student learning objectives (SLOs)

Wisconsin Coach Evaluation Rubric

The Wisconsin Coach Evaluation Rubric is intended to provide a common language that helps to define the roles and responsibilities of a coach. Coaches should use the rubric as a guide to reflect on their practice, and then plan and apply appropriate strategies to advance their skills further. Evaluators should use the rubric domains, components, leveled descriptors, elements, and examples to provide detailed feedback and coaching to the coach, as well as to guide collaborative professional conversations.

The Coach Evaluation Rubric uses the Coaching Competencies Practice Profile (CCPP) as the standards of coaching in Wisconsin. The CCPP serves as a launching point for administrators and implementation teams when developing a coaching system that integrates methods for selecting, training, and coaching coaches. The CCPP consists of measurable, observable, and behaviorally-based indicators for each essential function and promotes consistency *across practitioners* at the level of service delivery. The CCPP is the first step in developing a comprehensive coaching system. The intention is that the integration of the use of the CCPP for a local coaching system and the WI Coach Evaluation Rubric for individual coach professional growth can provide a strong, operational approach to improving teacher practice and, ultimately, student outcomes.

Core Competencies

- **Reflective Practice**: Engaging in continuous self-improvement through professional learning is a requisite for continued relevance in the advancement of ever-changing systems. Modeling the habits of lifelong learning and professional growth can lead to clients' ownership of and participation in the change process.
- **Change Facilitation**: Intentionally disrupting marginalizing policies, practices, and structures promotes the sustainability of equitable practices. Facilitating change based on both student- and systems-level data improves access to quality learning opportunities, redresses systemic inequities, increases the likelihood of adaptive change, and builds capacity within the organization.
- **Coaching Conversation Facilitation**: Facilitating the coaching conversation effectively supports clients to impact student outcomes positively.
- **Communication Skills**: Communicating effectively provides a consistent level of shared understanding for all and reduces barriers to impact student outcomes positively.
- **Relationship Development**: A mutually trusting and respectful relationship between coach and client is characterized by the reciprocal sharing of knowledge and perspectives, and honoring the expertise and experiences of all. This provides supportive conditions for shifting behaviors, mindsets, values, and beliefs.
- **Knowledge Base Development**: Developing one's knowledge and understanding of the systemic nature of schools and the core components of schooling, as well as an appreciation of the historical context of who has benefited and who has not, is essential for effective, systemic change. Also, the knowledge of a wide range of coaching approaches and the ability to use them enables one to be responsive to the situational needs of all clients, supporting their attention to and examination of practices that can effectively disrupt systemic oppression.

Levels of Performance

The levels of performance provide a proficiency description for each component and offer a roadmap for growth and improvement of the coaching skill levels. The performance (rubrics) provides a roadmap for elevating coaching practice. Coaches and evaluators should study the full rubric description of each component to gain a solid understanding of the performance of the skill across levels. Each component contains descriptors across each level of performance. The descriptors provide guidance to identify the differences among the levels of performance.

Framework for Levels of Performance

Unsatisfactory	Developing	Proficient	Distinguished
Descriptors at this level describe practices that do not convey an understanding of the concepts underlying the component. This level of performance may cause harm.	Descriptors at this level describe practices that demonstrate the necessary knowledge, skills, and attitudes to be effective, but the application is inconsistent (perhaps due to recently entering the profession or transitioning to a new building or grade level). Coaches at this level do not demonstrate the flexibility and experience that is reflected at the proficient level.	Descriptors at this level refer to successful professional practice. The coach at the proficient level consistently provides services at a high level. It is expected that most experienced coaches will frequently perform at this level.	Descriptors at this level refer to professional practices beyond that of the coach and client relationship. The coach's professional practice helps improve the professional practice of other coaches. Coaches performing at this level are master coaches and leaders in the field, both inside and outside of their work environment.

Overview of the Evaluation Process

Wisconsin designed its learning-centered coach evaluation process as a cycle of continuous improvement.

Evaluation Cycles

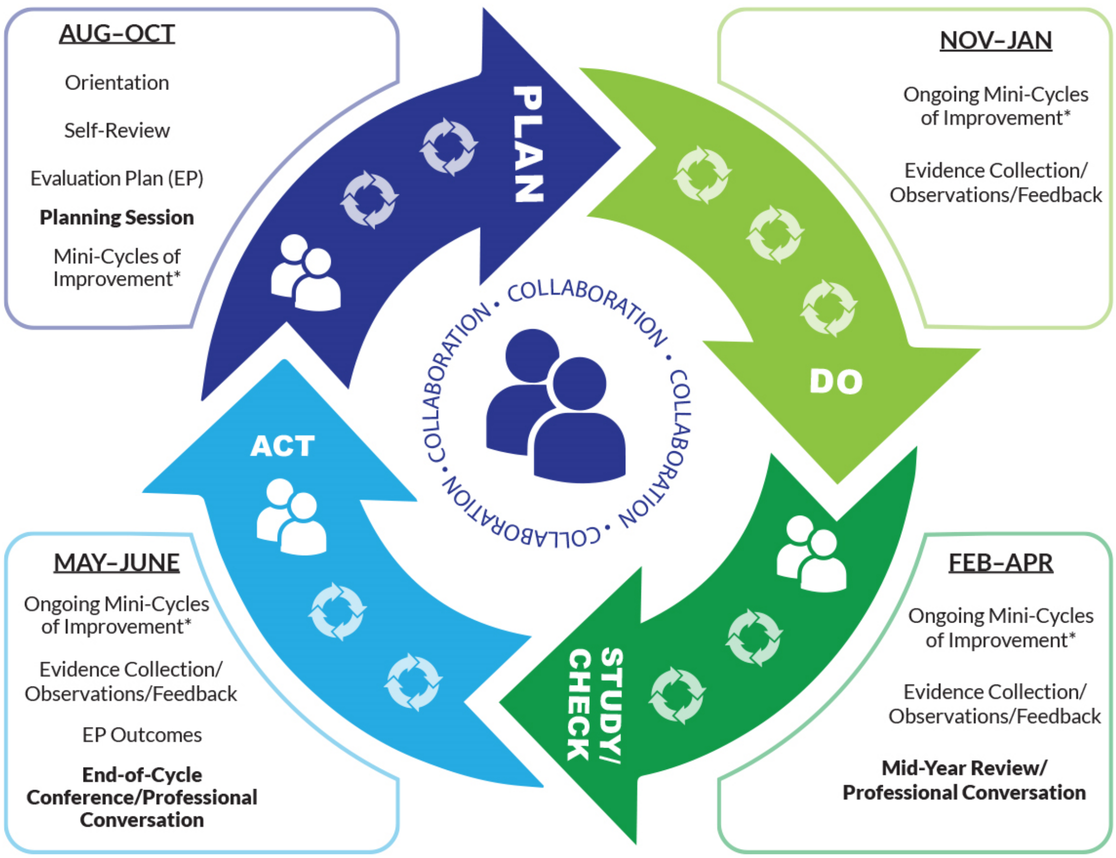
A coach can complete a one-year, two-year, or three-year process, known as the coach's evaluation cycle. District administrators or school principals determine the length of a coach's evaluation cycle (maximum of three years). However, coaches who are new to a district, or new to the profession must complete a one-year cycle.

The final year of an evaluation cycle (or the only year, if a one-year cycle) is called a Summary Year because coaches and their evaluators collaboratively summarize practice across all years. The one or two years before the Summary Year (depending on whether a two or three-year cycle) are called Supporting Years. Supporting Years emphasize collaborative discussions with a peer or evaluator around performance planning and improvement. These discussions should include measures of practice based on the Coach Evaluation Rubric, as well as measures of Client or Program Outcomes (CPO) and the quality of the processes used to impact student learning.

Lessons learned from an evaluation cycle inform the planning and development for the coach's subsequent cycle. Using data from all years within the evaluation cycle, the coach and the evaluator may identify trends in coach impact data and coach practice data to identify and set high-level, long-term goals for the duration of the subsequent evaluation cycle. These high-level goals will inform the development of annual goals within the annual improvement cycles. Progress towards annual goals should move progress towards the high-level cycle goal. (Note: The coach's cycle goal(s) can change across the duration of the cycle if data suggests it should.)

The evaluation cycle goals also offer an opportunity to strategically align district and school goals to coaching goals, while maintaining coach autonomy and professionalism to set individualized annual goals based on appropriate coaching practice and impact data.

Figure 2: Evaluation Milestones within Improvement Cycles



AUG–OCT	NOV–APR	MAY–JUNE
Orientation: Evaluator provides an overview of the system measures and processes, sources of support, timelines, and schedules. **Self-Review:** Coach analyzes client, school, district, or personal data to identify areas of strength and those for improvement. **Evaluation Plan (EP):** Coaches create their PPG and CPO. **Planning Session:** Review EP, discuss and adjust goals if necessary, identify evidence sources, actions, and resources needed.	**Evidence Collection/ Observation/Feedback:** Evidence collection, observations, and feedback continue throughout the cycle. **Mid-year Review/Professional Conversation:** Review PPG and CPO; adjust goals if necessary.	**Goals Outcomes:** Determine the degree of success in achieving CPO and PPG based on evidence. Self-summarize the CPO process at the quality indicator level and on the six levels of the CPO rubric. Evaluator assigns End-of-Cycle CPO Summary rubric levels in Summary Years. **End-of-Cycle Conference/ Professional Conversation:** Receive feedback on PPG and CPO achievement, discuss results on WI Coach Rubric components and CPO results. Identify growth areas for the upcoming year.

The Coach Evaluation Cycle of Continuous Improvement

Getting Started: Orientation

Evaluators must provide coaches who are new to the district or entering a Summary Year with an orientation. The orientation allows coaches and their evaluators to discuss these items:

- the creation, revision, or review of the coach job description,
- the evaluation criteria and the Coaching Competency Practice Profile,
- the evaluation process or the ongoing continuous improvement cycles informed by evidence of coach practice collected during observations,
- the use of evaluation results, and
- any remaining questions or concerns.

During the orientation, the evaluator identifies school or district resources available to coaches to answer questions about their evaluation process (e.g., process manuals, district handbooks, district training, and other resources), and highlights key components of the evaluation process that support the coach in continuous improvement (e.g., ongoing and embedded structures for regular and collaborative data review, reflection, and action planning, mentors, and coaches).

The orientation provides an opportunity for evaluators to build a foundation of trust. Administrators should encourage coaches to set goals that foster professional growth. To support risk-taking, the evaluator should communicate that learning happens through struggles and mistakes. Evaluators can effectively communicate this by modeling their own continuous learning processes and how they have learned from mistakes. Coaches are more apt to take risks when they know they will not be punished for engaging in this learning-centered evaluation process.

Self-Review

Completing a yearly self-review based on the Coach Evaluation Rubric helps provide the focus for the goal-setting processes in the evaluation cycle. The coach's self-review is based on Coach Rubric, as this framework provides the descriptors of effective professional practices, which can support strategic planning for improving practice. At a minimum, best practice is for coaches to complete the self-review annually, and particularly during the Summary Year.

Coaches who analyze and reflect on their practice understand their professional strengths as well as areas in need of development. The reflection that comes as part of the self-review allows the coach to consider how the needs of the coach's clients can, and do, connect to the larger goals of the school or district. A growth mindset is as important for the adults in the school as it is for the students, and applying goal-setting as part of a cycle of improvement helps to align priorities and maximize impact.

The Evaluation Plan (EP)

Coaches create an Evaluation Plan (EP) annually at the beginning of the school year. The EP contains two goals: the Professional Practice Goal (PPG), which focuses on coaching practices as outlined in the Coach Evaluation Rubric, and the Client or Program Outcomes (CPO), which focuses on the coach's impact on educator practices or program effectiveness.

Coaches develop both goals after self-reflection and analysis of client or program data and professional practice data (i.e., their self-reflection and evidence of their own prior performance from past evaluations, if applicable). The coaches' EP reflects goals related to their professional practice and relevant to the needs for client growth or program improvement. Peers and coaches discuss and revisit the EP in formal conferences with evaluations and within ongoing, informal conferences throughout the evaluation cycle. After receiving feedback and reviewing data, the coach monitors and adjusts EP goals, as appropriate, to best meet client or program needs.

Professional Practice Goal (PPG)

This goal serves as the basis for focused, individualized professional development as coaches relate their PPG to areas of further development within their professional practice.

Coaches develop PPGs around an area of improvement identified during their self- review or feedback from peers or their evaluator.

Questions to ask when developing a PPG:

- *What are my strengths and challenges as a coach?*
- *How is my practice reflected in the coach's self-review?*
- *What am I interested in learning/doing/improving?*
- *Where can I build in meaningful networking and collaboration with colleagues?*

Local Decision Point: Meaningful Outcomes of Coach Practice

It is not enough to strive to improve practitioner knowledge, strategies, and implementation of practice. Improved practice is meaningless unless it leads to improved impact on student success. While we cannot make a direct correlation between student outcomes and coaching, research exists connecting improved teacher practice to improved student outcomes. Building on research done by Joyce and Showers, the studies outlined below demonstrate a relationship between coaching and student outcomes:

- Improving teaching practice, with a particular emphasis on increasing the use of practices shown to be highly effective, including evidence-based practices, leads to improved student outcomes (Neufeld and Roper, 2003; Knight, 2009; Kretlow and Bartholomew, 2010; Snyder, Hemmeter and Fox, 2015).

- Improving learner academic and behavioral outcomes through improved teaching practices (Bean, Knaub, and Swan, 2000; Joyce and Showers, 2002; Kretlow and Bartholomew, 2010; Snyder, Hemmeter and Fox, 2015).

How Do We Measure the Impact of Practice for Coaches?

Administrators and evaluators should determine the most appropriate method used to measure positive impact in consideration of the roles and responsibilities of the individual coach, the needs of the clients that they serve (teachers, teams, systems), the availability of coaches to collaborate with each other, and the ability to function as a cohesive program. Coaches should have a voice in the decision-making process used to determine the method of measuring a positive impact. Districts or employers who employ more than one coach should determine if the method used to measure positive impact will be uniformly implemented for all coaches or vary from coach to coach.

Coaches often serve multiple roles and have varied responsibilities within a coaching system. It is important to first understand the roles and responsibilities of the coach's specific practice before determining their impacts. Below is a table that provides several examples of direct impact for different types of coaches.

Direct Impact

Type of Coach	Roles / Responsibilities	Direct Impacts of Practice
Instructional coach	● Partner with individual teachers to set goals and improve instruction. ● Co-plan and co-teach lessons.	● Increased fidelity of the implementation of instruction. ● Engaging lessons aligned to standards.
Teams coach	● Facilitates teams in establishing routines, processes, and protocols aligned to the district/building vision and mission. ● Challenges assumptions and pushes for details and depth when reviewing capacity, implementation, and outcome data.	● Development of a network of collaborative support for educators. ● Engages teams in cycles of continuous improvement.
Systems coach	● Partners with implementation teams to examine existing systems to improve and install supports. ● Development of district-wide training and coaching plan.	● Increase in-district capacity to support the installation of programs and innovations. ● Alignment of the coaching model with methods to collect coaching data and engage in PDSA.

Accurate Measurement of the Impact of Coach Practice

Coaches are one step removed from the direct impact on student learning, so it is not appropriate to rely on measures of student achievement to assess the impact of an instructional coach. Rather, measures such as client feedback connected to job-embedded professional learning, capacity assessments, Professional Learning Community (PLC) fidelity rubrics, and client surveys are useful. For example, coaches who use the Student-Centered Instructional Coaching model will directly impact teachers' use of classroom-level data to guide instructional decision-making, which can be verified by the use of client surveys. Coaches who partner with implementation teams to install systems of support could measure impact via capacity assessments.

It is not recommended to use the general results of teacher evaluation in the Educator Effectiveness System as a measure of coach impact or outcomes. While instructional coaches may have a direct impact on an individual educator's knowledge or application of instructional strategies, accurate use of teacher performance as a measure of coach performance would need to review growth on very specific, leveled critical attributes of the teacher evaluation rubric. That direct correlation between coach practice and teacher growth on specific skills can interfere with coach-client confidentiality, relationship, and rapport. Other individual teacher growth-tracking methods should be employed to review this aspect of coach impact.

The Client or Program Outcomes (CPO)

The Client or Program Outcome (CPO) is one of two goals in a coach's EP. The CPO represents a continuous improvement process similar to other inquiry or improvement cycle processes (PLC, data-teams, etc.). Coaches write at least one CPO each year. The coach should view the CPO as a way to take small steps towards a larger improvement process. While the CPO does require a focus on outcomes that the coach can directly impact, it does not require a coach to produce progress for all clients (or a subgroup of clients) in one year. Rather, it asks coaches to move individual, team, or systemic growth in one identified area of focus closer to that outcome.

The CPO process mirrors practices already in place within PLCs, data teams, or similar processes. The ongoing CPO process of setting goals, monitoring process, and adjusting practice in response to client data can be embedded within existing structures, eliminating duplicative practices.

Within the CPO process, the coach works collaboratively with peers, coaches, district or building administrators, and evaluators to:

- determine an essential target for the year (or interval),
- review client or program data to identify starting points and targeted change associated with the target for the year,
- review personal professional practice data (e.g., self-reflection and feedback from prior years' growth-centered evaluations) to identify strong practices to leverage, as well as those needing improvement, to support meeting the targeted change,
- determine authentic and meaningful methods to assess progress toward the targets, as well as how to document resulting data,
- review evidence of progress, as well as evidence of professional practices,
- reflect and determine if evidence of professional practices points to strengths which support progress toward the targets or practices which need improvement,
- adjust accordingly, and
- repeat regularly.

At the end of each year, the coaches reflect on their clients' progress and their own CPO practice across the year using the CPO Summary Rubric (Appendix F). Coaches draw upon this reflection, in addition to reflections on practice, to inform CPO and practice goals for the coming year.

In the Summary Year, the coach's evaluator reviews all CPOs completed and the corresponding evidence collected in that evaluation cycle using the CPO Rubric. The evaluator uses the CPO Rubric and quality indicators to provide detailed feedback to inform areas of strength, as well as to create a strategic plan for improving any areas needing growth.

Team CPOs

Sometimes teams of coaches from the same school or district may choose a common focus for their CPOs. This allows the team to collect and discuss trends and patterns in the data as well as the effectiveness of various professional strategies in an ongoing, collaborative way. The CPO rationale is based on data (client or program) that leads coaches in the team to focus on their CPO. Importantly, coaches must then collect baseline data from the clients or program and set their own change targets based on the data.

CPOs and New Coaches

Coaches new to the role or district face certain disadvantages because they have not established prior data relative to their practice and current assignment that may help them to narrow the focus of their CPO. One essential first step for new coaches is to ensure their job description is clearly defined and well understood. Coaches and supervisors are encouraged to reference the CCPP to inform conversations related to creating strong and relevant coach job descriptions. These coaches may need access to the historical district, building, or systemic information.

Writing the CPO

Creating a meaningful and achievable CPO is a challenging task. The CPO writing process involves addressing the following key considerations:

- baseline data,
- rationale (or finding your focus),
- focus,
- client population or targeted program,
- targeted growth or change,
- time interval,
- evidence sources,
- strategies and supports,
- implementation, and
- monitoring and adjustment.

Coaches will find it helpful to reference the CPO Quality Indicators (Appendix E) as they write and monitor the CPO across the interval. They may also use this document to support collaborative conversations regarding the CPO across the interval.

Rationale

Near the beginning of the interval, the coach gathers, reviews, and analyzes data on the needs of clients or programs. (Note: see the Accurate Measurement of the Impact of Coach Practice section of this user guide.) This analysis and reflection on needs, trends, strengths, and levels of direct impact leads to the identification of a specific focus for clients or program change. The coach provides narrative and data displays as the rationale for the focus of the goal.

Questions to ask when determining rationale:

- *What types of data (both qualitative and quantitative) are available?*
- *How have past clients I have worked with progressed?*
- *How effective are the programs I have helped to implement?*
- *Taken together, what story or stories do the data tell?*
- *Are there particular groups of clients who typically have more or less success than others? Are there equity issues to consider?*
- *Where do I see trends over time or patterns across data collection?*
- *What improvement goals do I have for my clientss or program?*
- *What strategies have I implemented?*
- *What successes or what barriers have I encountered in my attempts to improve client or program success?*

Baseline Data

Near the beginning of the interval, the coach gathers data on the targeted group of clients or programs for the CPO. Called the “baseline,” this data is reported in the CPO documentation. The baseline marks the starting point for the population group or program.

Focus

Coaches link the focus of the CPO to the appropriate coaching standards from the CCPP and confirm that the focus (content) is taught or reinforced throughout the interval of the CPO. CPOs typically focus on high-level skills or processes rather than discrete skills or outcomes.

When identifying a focus for the CPO, look for processes or skills that meet at least one of the following criteria:

- Endurance – Knowledge or skill that is useful across a lifetime, contexts, settings, years (e.g., coaches engage in self-directed learning to build coaching capacity. Coaches recognize gaps in their own learning and seek out professional learning to address those gaps).
- Leverage – Knowledge or skill that will be of value in multiple disciplines, settings, contexts, or buildings (e.g., coaches develop a variety of coaching strategies and approaches and are able to adjust their approach based on the needs of the client).
- Readiness (for the next level) – Knowledge or skill that is necessary for the innovation or coaching practice (e.g., coaches can identify and explain the importance of some key components of the innovation or practice and are actively developing their knowledge).

Client Population or Targeted Program

The coach defines the client population or targeted program change as a result of the data analysis completed at the beginning of the goal setting process. The data may often point to more than one potential area of focus. The coach has discretion in choosing the client population or targeted program, as there is rarely one right answer. By narrowing the focus to one area of practice, coaches are better able to work intentionally towards achieving their intended outcome.

Questions to ask when identifying the client population.

- *Does the data point to a particular client group(s) that I should identify as the target population for this CPO?*
- *If this group is very large, is there a way to narrow the population contained in this CPO to make it more manageable?*
- *If this group is very large, do I have the knowledge and expertise to write a tiered CPO?*
- *If this group is very large, is the best and most effective approach to create universal programming or strategies for all clients? Note: this approach necessitates involving other practitioners in your school, including building leadership.*

Targeted Client Growth or Program Change

Coaches use the baseline data to set an end goal, called the target, for projected client outcomes or program change. The change in the identified client group or program must be measured. The target indicates the amount of change anticipated in the identified client group or program.

For coaches new to goal-setting based on client outcomes or program change over time, setting the target may seem like an educated guess. Conversations with other practitioners may provide insight into how much change may be realistically possible in a focus area in a year or another interval. The coach who struggles to set the target should be reassured by the fact that the goal can be adjusted at mid-interval if it becomes apparent that it was set too high or too low.

Note that the set target is specific to the growth of clients, not students.

Time Interval

The duration of the CPO, called the interval, should extend across the entire time of the changing focus that the CPO occurs. For many coaches, the interval will span an entire school year. For others, the interval might last a semester or possibly another length of time. Coaches will do well to consider the reality that a longer interval provides more time to apply, monitor, and adjust coaching or facilitation strategies to achieve higher levels of client or program success.

Evidence Sources (Progress Monitoring)

Identifying evidence sources is a challenging but critical part of the CPO process, especially in the first few years. A largely formative, strategic assessment system becomes the basis from which a coach collects evidence of client growth or program change. Coaches may need to develop appropriate measures for their CPO. Coaches analyze the progress the clients or program make relative to the identified growth goals. For more information on evidence using artifacts, see Appendix C.

Interim assessment

An interim assessment is designed to monitor progress by providing multiple data points across the CPO interval. The type of assessment used may look different depending on whether the CPO is connected to instructional, team, or system coaching. Coaches use interim assessments strategically (baseline, mid-point, and end of interval) across the CPO interval to measure client growth or program change.

A system coach, for example, may use a capacity assessment to determine the system's strengths and weaknesses and develop action plans based on the ratings and team dialogue regarding each item. Assessing again at the middle and end of the year would determine if any progress was made in developing the system. Similarly, a team coach may use a team capacity assessment to determine a team's capacity at the beginning, middle, and end of the year. Instructional coaches may use a variety of tools to determine progress towards their CPO, including coach-team designed measures such as a rubric.

Creating common measures for use in the CPO process takes time. To monitor client growth related to coach or team designed assessments, coach teams need regular, structured time to meet and collaboratively identify targets and measures, review data, and create strategies to adjust practices and strategies accordingly.

Formative assessment

In addition to identifying or developing the interim assessment (used to measure progress toward the CPO formally), coaches also build in methods to monitor progress throughout the CPO interval. Effective coaches use informal, formative practices in an ongoing way to determine client needs.

Formative assessment practices serve two functions. First, formative practices remind coaches to implement the strategies and action steps identified within the CPO. Second, formative practices allow coaches to monitor client or program progress regularly and adjust strategies to respond to client or program needs flexibly. Coaches can quickly identify successful strategies and practices and leverage them, as well as unsuccessful practices to adjust or discard. This real-time adjustment within mini-improvement cycles allows coaches to have a greater impact on client or program success. For example, if a coach is coaching a team on their strategic use of data, agendas may illustrate the progress made by indicating the types of data analyzed and how the results were used. If coaches are engaged in an instructional coaching cycle, they may review and update a coaching service delivery plan (linked in Appendix D along with other tools that could be used as formative assessments) as an assessment of coaching progress.

Questions to ask when thinking about evidence sources:

- *Do I currently have a method to measure a given focus area?*
- *If not, can I, or my team, design a method to measure it?*
- *For every potential method: Is it…*
- *Valid: How accurately does it measure the focus area?*
- *Reliable: Will this method ensure consistent results are made in student outcomes or program change?*
- *How will I monitor client outcomes or program change along the way to measure the impact of the strategies without waiting for the middle or end of the interval?*
- *When will I analyze the client or program data, in relation to evidence of my practice, to know whether my strategies are working?*
- *Who will I involve in this ongoing analysis and reflection?*

Strategies and Supports

The strategies portion is key to the success of a CPO. This section of the CPO provides the plan of action the coach will use to meet the goal. It calls upon coaches to be thoughtful and develop a plan that will improve their strategies and actions and utilize available supports that will ultimately result in higher levels of growth for clients or program impact. It is important to understand that improved client growth will not occur if the coach is not also learning (e.g., coaching strategies and skills). Simply identifying new strategies without supporting coaches' ability to learn how to use the strategies effectively will not result in client growth or program change. One strategic tool that may be utilized to capture this information is a coach service delivery plan. This plan specifies the coaching elements that will promote quality service delivery, support for the client, and serve as the basis for further professional development.

It is critical to identify a few key strategies that will lead to better results. Having too many strategies guarantees, they will be lost in the day-to-day business of a school. Having too few strategies or the wrong strategies will not have any impact at all. Strategies that fit one context may not work well in another. Coaches must remember that even the most carefully thought out and crafted strategies may need an adjustment (or replacement) as the year goes on as part of continuously improving practice.

Questions to ask when determining strategies or supports:

- *What am I doing or not doing that is leading to changes in client or program outcomes?*
- *What evidence do I have to support my answers to the question above?*
- *What actions can I take to improve client or program outcomes? What do I need to start or stop doing?*
- *Do I have a colleague or mentor who could help me identify ways I might improve practice?*
- *What kind of learning do I need, and where can I get it?*

CPO Goal Statement (SMARTE Criteria)

A SMARTE goal is simply a type of goal statement written to include specific components. They are:

- **Specific**: Identify the focus of the goal; leave no doubt about who or what is being measured.
- **Measurable**: Identify evidence sources (those used at the beginning, middle, and end of the interval that establishes baseline and measure).
- **Attainable**: Requires reflection and judgment. The goal should be attainable but also rigorous, and it should speak to high standards of achievement for all clients and programs.
- **Results-based**: The goal statement should include the baseline and target for all clients, groups, and programs covered by the CPO. This may be included as a table or even in an attachment that clearly spells out what the starting point and expected ending point is for each client, groups of clients, or program.
- **Time-bound**: The goal is bound with a clear beginning and end time. For the CPO, restate the interval (e.g., September 2019 – May 2020).
- **Equitable**: Goals ensure all clients and programs that can benefit from a strategy, intervention, or program will have the opportunity to participate, regardless of demographic characteristics.

Individuals new to SMARTE goal writing may find it helpful to underline each component in the goal to ensure all parts are included.

Implementation

Even the most thoughtful, well-written CPO will not be successful if the coach does not implement the identified strategies. Some strategies are straightforward, while others are more complicated and will require multiple steps. Coaches who collaborate in an ongoing way about an unfolding CPO process will benefit from mutual accountability as well as the feedback and support that such collaboration provides.

Once developed, the coach shares the PPG and CPO with an evaluator, peer, or coach for reflective discussion. In collaboration, they continue to monitor PPG and CPO progress through evidence collection and reflection over the course of the interval. The next section discusses the processes and conversations that support the coach's EP.

Ongoing Conversations

Coaches meet with their evaluators formally in the beginning, middle, and end of the year, but these conversations should continue informally throughout the year with peers and team members.

Planning Session

The Planning Session serves as the first formal check-in and allows for conversations around goal development and goal planning. At the Planning Session, coaches receive support, encouragement, and feedback regarding their PPG. Collaborative conversations, such as those that happen as part of the Planning Session, encourage reflection, and promote a professional growth culture.

Coaches prepare for these collaborative conversations by sharing their PPG with their evaluator. When preparing for a Planning Session, coaches reflect on all the questions they addressed as they completed the self-review and developed their goal, as well as identify where they need support.

Evaluators prepare for these collaborative conversations by reviewing the PPG in advance to develop feedback related to each goal and to identify questions that will foster a collaborative conversation and reflection.

Mid-Year Review

The Mid-Year Review is one of three formal check-ins built into the process. At the Mid-Year Review, coaches converse with their evaluator about evidence of professional practice, client growth collected and observed, as well as resulting reflections and strategy adjustments to date.

Coaches prepare for the Mid-Year Review by reviewing progress toward the PPG goal based on evidence collected, assessing strategies used to date, and identifying any adjustments to the goal or strategies used, if necessary. They then provide their evaluator a mid-year progress update. The professional conversation should include an authentic discussion regarding the coach's learning process and practice. A discussion solely based on filling in forms for the second time in the year will not impact learning.

Questions to ask when preparing for the Mid-Year Review:

- *What does the evidence I have collected tell me about the progress of my goal?*
- *Am I on track to achieve my goal?*
- *Do I need to adjust my strategy so that I can achieve my goal?*
- *What evidence can help identify which strategies need adjustment?*
- *What support do I need to achieve my goal?*

Evaluators prepare for the Mid-Year Review by reviewing the coach's progress toward the goal, including evidence collected and strategies used to date, as well as developing formative feedback questions related to the goal.

Summative Feedback and End-of-Cycle Summary Conference

The End-of-Cycle Conference provides an opportunity for deep learning, reflection, and planning for the next steps. The conference provides the coach and evaluator an opportunity to align future goals and initiatives at the system, team, and individual level. The foundation of trust developed over the course of the ongoing, collaborative process is rewarded as coaches, and their instructional leader both grow professionally.

Coaches prepare for the End-of-Cycle Conference by sharing results of their PPG and CPO with their evaluator or peer coach.

Questions to ask when preparing for the End-of-Cycle Conference:

- *What does the evidence I have collected tell me about the results of my goals?*
- *Did I achieve my goals?*
- *If not, why did I not achieve my goals?*
- *If yes, why did I achieve my goals?*

Evaluators prepare for the End-of-Cycle Conference by reviewing goal results, including evidence collected, and plan feedback related to the goals. At the end of the Summary Year, the evaluator provides summative feedback on the coach's practice using the descriptors for each component of the WI Coach Evaluation Rubric and on the CPO processes using the Quality Indicators and levels on the six criteria of the CPO Summary Rubric. As previously noted, preparing ahead of time will help the evaluator align feedback related to goals and professional practice to more effectively and efficiently structure the End-of-Cycle Conference conversation.

During the conference, the evaluator and coach collaboratively review evidence, goal results, and possible next steps. In a Summary Year, the evaluator shares levels of performance for the CPO and the descriptors of each of the components of the WI Coach Evaluation Rubric. By discussing feedback at the descriptor level, the evaluator and coach not only identify areas of focus (components) for the coming Evaluation Cycle but also develop a strategic plan based on actionable changes (strengths to leverage and areas to improve). As coaches collaboratively reflect on their Evaluation Cycle and the lessons learned during the conference, they also plan for a new Cycle.

Professional Conversations Surrounding the CPO and PPG

Wisconsin's learning-centered evaluation process provides multiple opportunities for collaborative, professional conversations. Coaches meet with their evaluators formally in the beginning, middle, and end of the year, but these conversations should continue informally throughout the year with peers and team members.

The Planning Session serves as the first formal check-in and allows for conversations around goal development and goal planning. At the Planning Session, coaches receive support, encouragement, and feedback regarding their CPO and PPG goals and related processes. Collaborative conversations, such as those that happen as part of the Planning Session, encourage reflection, and promote a professional growth culture.

Coaches prepare for these collaborative conversations by sharing their PPG and CPO with their peer or evaluator. When preparing for a Planning (or Peer Review) Session, coaches reflect on all the questions they addressed as they developed their goals and identified where they need support.

Evaluators or peers prepare for these collaborative conversations by reviewing the PPG and CPO in advance to develop feedback related to each goal and identify questions that will foster a collaborative conversation and reflection. The WI learning-centered evaluation process is based on ongoing, timely feedback that will stretch thinking and foster educator growth. Peers or evaluators can foster such conversations by using a coaching protocol that has three key elements: validate, clarify, and stretch and apply.

Validate

What are the strengths of the CPO or PPG? What makes sense? What can be acknowledged? ("I see you have done a thorough analysis of your school and classroom data. It's evident you have dug into the coaching competencies and have been thinking about…")

Clarify

This involves either paraphrasing (to show that the message is understood and check for understanding) or asking questions (to gather information, clarify reasoning, or eliminate confusion). ("So, your plan includes professional learning around inclusive practices. What data (e.g., student or professional practice) led you in this direction?")

Stretch and Apply

Raise questions or pose statements to foster thinking, push on beliefs, and stretch goals or practices. ("How might you get your clients more actively involved in setting and monitoring their progress as it relates to the goals within the CPO?")

During the Planning Session, the evaluator and coach discuss and agree upon evidence sources for both the CPO and PPG goals. In the Summary Year, the evaluator and coach discuss and plan possible observation opportunities and related artifacts that will provide adequate evidence for the Summary Year evaluation.

Reflection and Refinement

Reflection includes the identification of both performance successes and areas for performance improvement. Coaches should review performance successes to identify factors that contributed to the success, which of those factors they can control, and how to continue those in the next cycle. Likewise, coaches should reflect upon areas that need improvement to identify potential root causes and explore possible coaching strategies to address those challenges in the future.

> **Example:**
> It is inefficient and ineffective to try to improve upon all 16 Coach Evaluation Rubric components at once. By evaluating all 16, the evaluator and coach can identify which components are currently strengths to leverage and which require growth. Using this information, the evaluator and coach can collaboratively identify areas of focus for improvement.

A rubric is a holistic tool with connections between components. In setting goals for the next Evaluation Cycle, look for relationships between the indicators and focus on one or two high-leverage components. For example, a goal that focuses on component 3c, (challenges assumptions) may also contribute to component 2c (generates productive conflict (disequilibrium)). By providing feedback for the components at the discrete, descriptor level, evaluators and coaches can create strategic plans and next steps for moving practice in a component forward.

Evidence Collection

At the end of each year, coaches review the evidence collected during the Cycle and the relationship of the evidence to both their PPG and CPO goals.

Coaches in all years of the cycle ensure that they have collected evidence that demonstrates their progress and successes in achieving both their PPG and CPO goals. CPO evidence will include baseline, mid-point, and end of interim assessments given to the population or program identified in the CPO as well as the results. Coaches in their Summary Year will have additional evidence related to the domains and components of the WI Coach Rubric and should ensure that they have collected evidence related to each of the components.

Artifacts

Artifact Portfolio

Coaches are strongly recommended to use the DPI provided forms. However, if your current forms are working, you can continue to use them.

Artifacts are documentation (e.g., time logs, reflection logs, feedback forms, coaching service delivery plan) containing evidence of certain aspects of professional practice (i.e., components of the rubric) that may not be readily visible through an observation. The evidence identified in artifacts demonstrates levels of professional practice related to the components of the coach evaluation rubric. Evaluators and coaches use evidence from individual artifacts to inform goal monitoring and feedback as well as discussions about the levels of performance for related coach evaluation rubric components.

There is no requirement related to the number of artifacts for each component. Coaches should strategically identify high-leverage evidence sets that relate to more than one component and fill in gaps with other evidence as needed to illustrate practice fully.

Announced Observations

Observations provide a shared experience between coaches and their evaluators. Observations allow evaluators to see coaches in action and to provide the most direct method of obtaining evidence of practice.

Given the confidential nature of a coach-client partnership, observations must always be announced. Furthermore, the client must give permission for the evaluator to be present and conduct an observation. Given that a coaching partnership is confidential, the observer must respect this confidentiality. Another best practice would be for someone other than the building leader to conduct the observation. Clients may be less likely to engage in an authentic coaching cycle if the coach observer is their evaluator. This protocol is necessary to protect trust within the coach-client partnership, given that honesty is essential to the reflective process of the educator.

The announced observation provides a comprehensive picture of practice and opportunities for formative feedback at the rubric descriptors level. **One formal announced observation is typically 30-45 minutes in length from the beginning of the session to the end. Additional observations may provide more in-depth information about the meaningfulness of the rubric for providing feedback to the coach but are not required.**

Evaluators may have many natural opportunities to observe the coach perform other duties outside the primary coaching role. These occasions may be utilized to collect additional observation evidence and to provide growth-oriented feedback for the coach. These opportunities to observe leadership skills and knowledge or expertise are not limited to and may include planning and leading professional development, PLC meetings, team meetings with teachers, and consultation check-ins with leadership teams.

Evaluatiors should remain engaged in the purpose of the consultation or meeting and not allow the collection of evaluation evidence to divert their focus. However, the evaluator may choose to collect notes on evidence observed during those interactions and add that information to the evaluation documentation in the form of a mini-observation. This evidence and post-event feedback should be shared with the coach within the same timeframe as other types of observations.

The coach and evaluator may decide that several (three to four) announced mini-observations spread across the year might provide a more comprehensive picture of practice and opportunities for formative feedback. Mini-observations must follow the collaborative nature of any announced observation to protect coach-client confidentiality. Mini-observations are typically 15-20 minutes in length.

Pre-conference

The pre-conference allows coaches to provide context for the observation and share what the coaching competencies look like and sound like within their sessions. It provides essential evidence related to a coach's skill in planning a session. The pre-conference discussion allows the coach to identify potential areas that might benefit from feedback and sets the stage for the evaluator to better support the teacher following the observation.

Post-conference

The post-conference also plays an important role in the observation process as it provides immediate, actionable feedback to the coach. Wiggins (2012, 10-16) defines actionable feedback as neutral (judgment-free), goal-related facts that provide useful information. The discussion enables the evaluator to learn about the coach's thinking and reflection related to the session, what went well, and how the session could be improved. The coaching protocol can help the evaluator or peer to plan questions that both support and stretch the coach's thinking and practices.

Tips and Considerations for Conducting Announced Observations of Coaches

Focus on what's important and what's immediate
To maximize the impact and relevance of feedback, evaluators should ask coaches what they most desire feedback on and what practices they would most like the evaluator to observe.

Additionally, an evaluator can draw upon previous evidence of practice (past Evaluation Cycles or observations) to identify areas for growth. The evaluator can focus efforts during the observation to find evidence of the identified components.

Manipulate time or remain invisible
The presence of an evaluator may affect how the coach or clients behave. Evaluators could avoid this by using a variety of observation methods, including asking coaches to record themselves in action and submit links or videos for their evaluators to review. This method not only removes anxiety for the coach but can also address the scheduling and capacity limitations of the evaluator by removing the requirement for the evaluator to observe the practice in real-time.

Use high-leverage evidence sets
High-leverage evidence sets result from the intentional and strategic collection and use of observations and artifacts. These evidence sources differ from a random collection of artifacts or observations that are then retroactively assigned to components (e.g., coach time log with no context or reflection, coach service delivery plan with no context or reflection, PD (professional development) session attendance record with no agenda or evidence of how the learning was utilized).

Isolated or random evidence sources may provide little insight about professional practice and insufficient information to evaluate individual components and have little strategic value in and of themselves. In contrast, high-leverage evidence sets help illustrate professional practice as it deeply informs professional practice, providing a rich basis for reflection and growth.

A high-leverage evidence set covers multiple components. Thus, coaches may potentially collect fewer evidence examples, which can ease their burden. Additionally, high-leverage sets ease the burden of the evaluator, who otherwise must try to figure out what all the disparate artifacts tell about professional practice.

Completing the CPO

After collecting and reviewing evidence, coaches summarize the CPO process using the levels for each of the six CPO criteria of the CPO Rubric as well as the Quality Indicators Checklist (Appendix E). Assessing the CPO requires a coach to reflect on evidence. The engagement of coaches in the CPO process, along with their Supporting Years' Self-review become evidence of their ability to accurately reflect on their practice and its impact on client or program progress. The evaluator will use this as the evidence to support feedback and discussion in the coach's Summary Year.

In a Summary Year, the evaluator reviews all available CPOs (three in a typical three-year cycle, only one for a first-year coach) and identifies the level of performance for each of the six CPO criteria using the CPO Rubric as well as the Quality Indicators Checklist (Appendix E), which best describes CPO processes across years.

The evaluator reviews the CPOs completed over the course of the cycle before meeting with the coach, as this provides an opportunity for the evaluator to prepare notes for the End-of-Cycle Conference. Advance preparation supports conversations and reflections aligned to the criteria level and provides the most specific and actionable feedback to inform changes in the coach's practice.

References

Bean, Rita M., Allison L. Swan, and Rebecca Knaub. 2003. "Reading Specialists in Schools with Exemplary Reading Programs: Functional, Versatile, and Prepared." *The Reading Teacher* 56, no. 5 (2003): 446-55. www.jstor.org/stable/20205223.

Hortonville Area School District. n.d. *Special Education: Hortonville Area School District.*

Joyce, Bruce R., and Beverly Showers. 2002. *Student Achievement through Staff Development*. Alexandria, VA: Association for Supervision & Curriculum Development.

Kanke, Joseph. 2020. “Hortonville Area School District's Dance with Inclusion.” https://dpi.wi.gov/coaching/interview-hortonville-area-school-district

Knight, Jim. 2009. *Coaching Approaches and Perspectives.* Thousand Oaks, CA: Corwin Press.

Kretlow, Allison Graves, and Christina C. Bartholomew. 2010. “Using Coaching to Improve the Fidelity of Evidence-Based Practices: A Review of Studies.” *Teacher Education and Special Education* 33, no. 4 (November 2010): 279–99.

Neufeld, Barbara and Dana Roper. 2003. “Coaching: A Strategy for Developing Instructional Capacity.” *Annenberg Institute*

Snyder, P. A., Hemmeter, M. L., and Fox, L. 2015. Supporting Implementation of Evidence-Based Practices Through Practice-Based Coaching. *Topics in Early Childhood Special Education, 35*(3), 133-143. doi:10.1177/0271121415594925

Wiggins, Grant. 2012. “Seven Keys to Effective Feedback”, *Educational Leadership* Volume 7, pp.10-16. Retrieved from http://www.ascd.org/publications/educational-leadership/sept12/vol70/num01/Seven-Keys-to-Effective-Feedback.aspx

Appendices

Appendix A: Resources for Continued Learning

Appendix B: WI Coach Evaluation Rubric

Appendix C: Type and Frequency of Observation and Supporting Artifacts and Evidence

Appendix D: At-A-Glance Artifacts Sheet

Appendix E: CPO Quality Indicator Checklist

Appendix F: CPO Summary Rubric

Appendix A: Resources for Continued Learning

Trust

Trust between educators, administrators, students, and parents is an important organizational quality of effective schools.

Bryk, A.S., and Schneider, B. (2002). Trust in schools: A core resource for improvement. New York, NY: Russell Sage Foundation.

Tschannan-Moran, M., and Hoy, W. (2000). A multidisciplinary analysis of the nature, meaning, and measurement of trust. Review of Educational Research, 70(4), 647-93.

Goal-setting

Public and private sector research emphasizes the learning potential through goal-setting.

Locke, E. and Latham, G.P. (1990). A theory of goal-setting and task performance. New York: Prentice Hall.

Latham, G.P., Greenbaum, R.L., and Bardes, M. (2009). "Performance Management and Work Motivation Prescriptions", in R.J. Burke and C.L. Cooper (Eds.), The Peak Performing Organization. London: Routledge. pp. 33-49.

Locke, E.A., and Latham, G.P. (2013). New Developments in Goal-setting and Task Performance. London: Routledge.

Coaching, Support and Feedback

Aguilar, Elena. (2013). The Art of Coaching: Effective Strategies for School Transformation. San Francisco, CA: Jossey-Bass.

Aguilar, Elena. (2016). The Art of Coaching Teams: Building Resilient Communities That Transform Schools. San Francisco, CA. Jossey-Bass.

Barkley, Stephen G., with Bianco, Terry, Quality Teaching in a Culture of Coaching. Lanham, MD: Rowman and Littlefield Education.

Bloom, G., Castagna, C., Moir, E., and Warren, B. (2005). Blended Coaching: Skills and Strategies to Support Principal Development. Thousand Oaks, CA: Corwin Press.

Cheliotes- Gross, Linda, and Reilly- Flemming, Marceta. (2010). Coaching Conversations: Transforming Your School One Conversation at a Time. Thousand Oaks, CA: Corwin Press.

Danielson, C. (2016). Talk about Teaching: Leading Professional Conversations. Thousand Oaks, CA: Corwin Press.

Hattie, J. (2009). Visible learning: A synthesis of over 800 meta-analysis relating to achievement. New York: Routledge.

Hall, Pete and Simeral, Alisa. (2008). Building Teachers' Capacity for Success: A Collaborative Approach for Coaches and School Leaders. Arlington, VA. Association for Supervision and Curriculum Development.

Hargrove, Robert. (2008). Masterful Coaching. San Francisco, CA: Jossey-Bass.

Kee, Kathryn; Anderson, Karen; Dearing, Vicky; Harris, Edna; and Schuster, Frances. (2010) Results Coaching: The New Essential for School Leaders. Thousand Oaks, CA. Corwin Press.

Kise, Jane, and Russell, Beth. (2010). Creating a Coaching Culture for Professional Learning Communities. Bloomington, IN: Solution Tree Press.

Kluger, A.N., and DeNisi, A. (1996). The effects of feedback interventions on performance: A historical review, a meta-analysis, and a preliminary feedback intervention theory. Psychological Bulletin, 119(2), 254-284.

Knight, Jim. (2007). Instructional Coaching: A Partnership Approach to Improving Instruction. Thousand Oaks, CA: Corwin Press.

Kraft, M.A., Blazar, D., Hogan, D. (2016). The Effect of Teaching Coaching on Instruction and Achievement: A Meta-Analysis of the Causal Evidence. Brown University Working Paper.

Lipton, L., Wellman, M. (2013). Learning-focused supervision: Developing professional expertise in standards-driven systems. Charlotte, VT: MiraVia, LLC.

Psencik, Kay. (2011). The Coach's Craft: Powerful Strategies to Support School Leaders. Oxford, OH. Learning Forward.

Reiss, Karla. (2007). Leadership Coaching for Educators: Bringing Out the Best in School Administrators. Thousand Oaks, CA: Corwin Press.

Reeves, Douglas B., and Allison, Elle. (2009). Renewal Coaching: Sustainable Change for Individuals and Organizations. San Francisco, CA: Jossey-Bass.

Reeves, Douglas B., and Allison,Elle. (2010). Renewal Coaching Workbook. San Francisco, CA: Jossey-Bass.

Sweeney, Diane, and Leanna Harris. Student-Centered Coaching: the Moves. Corwin, 2017

Stoltzfuss, Tony. (2008). Coaching Questions: A Coach's Guide to Powerful Asking Skills. Virginia Beach. VA: Tony Stoltzfuss.

Tschannen-Moran, Bob, and Tschannen-Moran, Megan. (2010). Evocative Coaching: Transforming Schools One Conversation at a Time. San Francisco, CA: Jossey-Bass.

Whitworth, Laura, Kimsey-House, Karen, Kimsey-House,Henry, and Sandahl, Phillip. (2007). Co-Active Coaching: New Skills for Coaching People Toward Success in Work and Life. Mountain View, CA: Davies-Black Publishing.

Appendix B: WI Coach Evaluation Rubric

1. Reflective Practice				
Component	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
1.a. Develops coaching capacity through professional learning	• Does not recognize the need to build coaching capacity • Does not engage in opportunities for professional growth	• Engages in directed learning to build coaching capacity • Engages in opportunities for professional growth with no awareness or regard of individual gaps	• Engages in self-directed learning to build coaching capacity • Recognizes gaps in own learning and seeks out professional learning to address those gaps	• Demonstrates a deeper understanding by engaging in dialogue with others related to self-directed learning • Notices gaps in the learning of other coaches and engage in collaborative learning or peer coaching to address the gaps
1.b. Develops emotional intelligence and resilience	• Regularly interjects thoughts and feelings throughout the coaching conversation • Interacts in negative or defensive ways, is easily offended • Shifts the focus of the conversation from the client to the coach • Fails to connect their own emotional responses to the beliefs and biases that underlie them	• Inconsistently regulates and monitors their own emotional state • Inconsistently makes choices about when and how to share own feelings and thoughts • Maintains focus on the goals of the client when prompted • Connects their emotional responses to personal values, beliefs, and biases when prompted	• Consistently regulates and monitors their own emotional state • Proactively makes choices about when and how to share own feelings and thoughts • Maintains focus on the goals of the client • Consistently articulates the values, beliefs, and biases they bring to the coaching conversation	• Supports and promotes emotional regulation in peers • Acknowledges peers for their proactive choices in sharing thoughts and feelings • Clarifies alignment of client and system goals • Prompts peers to share their values, beliefs, and biases
1.c. Seeks and applies feedback for self-improvement	• Becomes defensive when feedback is offered • Does not engage in learning to address the feedback • Does not incorporate appropriate change in practice	• Accepts and responds to feedback • Inconsistently engages in learning to address the feedback • May not always incorporate appropriate change in practice	• Intentionally seeks feedback, accepts it and responds • Engages in learning to address the feedback • As a result of feedback or learning/supports, incorporates an appropriate change in practice	• Reveals personal feedback and intended response to peers as a model for improvement • Uses personal feedback to intentionally engage in shared learning • Coach and peers engage in reciprocal accountability to use learning as a catalyst for change

2. Change Facilitation				
Criteria	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
2.a Analyzes data, evolving and fluid situations, and systems for the conditions of change	• Does not consult data • Makes decisions with irrelevant data from insufficient sources or perspectives • Uses deficit-based approaches when interacting with the client • Consistently misses opportunities to	• Looks at data on own and shares results with a client • Collects information from limited sources and perspectives • Inconsistently supports the client with identifying strengths • Inconsistently identifies barriers or opportunities to leverage change	• Strategically looks at data with the client • Collects information from multiple appropriate sources and diverse perspectives to inform continuous systemic improvements • Consistently supports the client with identifying strengths • Consistently identifies barriers and opportunities to leverage change	• Encourages clients to examine how their individual or team data may affect the larger building/district system • Supports client to make data-informed decisions which incorporates information from multiple and diverse perspectives to inform continuous systemic improvement • Supports the client in identifying and highlighting the strengths of a system • Supports the client in identifying systemic barriers that need to be addressed at a
2.b Supports client to develop action plans and goals that include evidence-based, high-quality educational practices implemented with fidelity	• Does not consider the school or district strategic/improvement plan fidelity measures • Does not use gradual release strategies	• Works in alignment with the school or district strategic /improvement plan without considering fidelity measures such as professional learning, data collection, and leadership support • Inconsistently uses gradual release strategies	• Consistently works in alignment with the school or district strategic /improvement plan while considering fidelity measures such as professional learning, data collection, and leadership support • Consistently uses gradual release strategies in response to the clients' needs and skill levels	• Engages in dialogue regarding action items in the school or district strategic improvement plan to include the development of policies, procedures, and guidelines to support a new way of work and reduce administrative barriers to using a program as intended • Intentional use of gradual release strategies has built client's capacity to develop a system of shared leadership
2.c Generates productive conflict (disequilibrium)	• Maintains the current way of being by not encouraging clients to seek out different or innovative approaches	• Selects strategies that encourage clients to seek out different or innovative approaches	• Consciously selects strategies that encourage clients to seek out innovative approaches to leverage opportunities and address barriers	• Actively selects strategies that encourage clients to disrupt marginalizing policies, practices, and structures to promote equitable practices
2.d Expects, attends, and mitigates resistance to change	• Responds in ways that enhance the client's resistance to change	• Recognizes resistance to change and retroactively addresses it	• Consistently and proactively anticipates, recognizes and accepts resistance to change	• Questions, probes and investigates the underlying causes of resistance to change and proactively address them

3. Coaching Conversation Facilitation				
Criteria	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
3.a. Structures conversations around a cyclical model	• Provides no structure to conversations • Mis-structures conversations, so that forward progress is not aligned or facilitated	• Inconsistent in use of a cyclical model • Sometimes provides structure to conversations or there is a commitment to a new action that is misaligned to goal	• Consistently uses a cyclical model for structuring conversations • Consistently moves client to generate a commitment to action that is aligned to goals	• Prompts client to reflect on how past coaching cycles influence current cycles and inform goal-setting, change in practice and data collection • Supports client's understanding of how their individual actions and goals are part of the larger system
3.b. Promotes reflection	• Overlooks the need for consistent and ongoing feedback	• Inconsistent and unpredictable in providing feedback	• Provides process feedback by restating what is being observed or articulated	• Encourages the client to reflect on feedback
3.c. Challenges assumptions	• Positions self as the expert • Directs decisions without considering the needs of the client	• Uses questioning to clarify • Seldom draws upon the expertise of the client	• Consistently uses questioning to clarify, extend and deepen thinking, explore options, invite diverse perspectives • Consistently draws upon the expertise of the client	• Encourages the client to consider how the assumptions of others, or assumptions held at the system level, affect student outcomes. • Partners with the client in considering how their expertise can facilitate system change
3.d. Pushes for details and depth	• Neglects or misidentifies focus • Leads client to make uninformed decisions • Does not consider the consequences of uninformed decisions	• Inconsistently identifies focus • Inconsistently gathers background information • Possibilities and obstacles are inconsistently identified	• Consistently identifies focus • Consistently gets background information • Consistently identifies possibilities and obstacles	• Uses questioning to check the alignment of client and system focus • Connects background information to system-wide initiatives • Brings system-level strengths and obstacles into the planning process

4. Communication Skills				
Criteria	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
4.a. Communicates effectively in multiple contexts outside the coaching conversation (e.g., delivering PD, written and verbal communication)	• Uses deficit-based language and focuses on labels instead of people • Uses communication styles that disengage others • Shuts down strong emotions that preclude productive outcomes • Neglects to communicate, or otherwise diminishes or blocks communication loops	• Uses person-first language • Inconsistently uses culturally and linguistically responsive communication methods • Sometimes leverages others' strong emotions in conversations • Communicates with others to support communication loops	• Uses asset-based and person-first language • Uses culturally and linguistically responsive communication methods including non-verbal messaging • Consistently leverages others' strong emotions to maximize productive outcomes. • Consistently facilitates a process to support communication loops	• Uses and promotes asset-based and person-first language • Uses culturally and linguistically responsive communication methods including non-verbal messaging and prompts others to do the same • Leverages others' strong emotions to maximize productive outcomes and prompts others to do the same • Facilitates a process to support communication loops and encourages teams to consider ways to engage with historically excluded stakeholder groups

5. Relationship Development				
Criteria	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
5.a. Builds trust, rapport, and respect with clients and stakeholders	• Breaks confidentiality • Disregards commitments • Does not consider how their own emotions may affect their interactions at work • Demonstrates apathy • Does not consider others in goal setting • Fails to address or fosters unsafe or hostile environments • Creates or perpetuates hierarchical relationships or dominates interactions • Listens with intent to act as an expert • Suspicious of ill intentions • Interjects opinions • Interjects judgment	• Often maintains the confidentiality of others • Inconsistently keeps commitments • Inconsistently encourages clients to speak about their emotions to examine how their feelings and emotional responses affect their interactions and work • Inconsistently demonstrates empathy • Inconsistently demonstrates the ability to leverage individual ways of knowing as an asset to accomplishing goals • Inconsistently supports the client to create and maintain norms that foster a safe and supportive environment • Inconsistently seeks and models an equal partnership between coach and client • Inconsistently listens for the benefit of the speaker • Inconsistently assumes positive intentions • Sometimes expresses opinions • Sometimes expresses judgment	• Consistently maintains coach/client confidentiality • Consistently and independently keeps commitments • Consistently and independently encourages clients to speak about their emotions to examine how their feelings and emotional responses affect their interactions and work • Consistently and independently demonstrates empathy • Consistently and independently demonstrates the ability to leverage individual ways of knowing as an asset to accomplishing goals • Consistently and independently supports the client to create and maintain norms that foster a safe and supportive environment • Consistently and independently seeks and models an equal partnership between coach and client • Consistently listens for the benefit of the speaker, from a place of compassion and curiosity • Consistently assumes positive intentions • Consistently refrains from giving opinions • Consistently suspends judgment	• Promotes a culture of confidentiality between others • Consistently and independently keeps commitments and praises/prompts others to do the same • Consistently and independently encourages clients to speak about their emotions to examine how their feelings and emotional responses affect their interactions and work within the system • Consistently and independently demonstrates empathy and praises/prompts others to do the same • Consistently and independently demonstrates the ability to leverage individual ways of knowing, honors the expertise and experiences of others as an asset to accomplishing goals and makes explicit connections to how they fit within and affect the system • Consistently and independently supports the client to create and maintain norms that foster a safe and supportive environment and encourages their use by prompting the client to consistently review and assign a process observer • Consistently and independently seeks and model and equal partnership between coach and client and documents the work using a coaching service delivery plan • Consistently listens for the benefit of the speaker, from a place of compassion and curiosity, and praises/prompts others for doing the same • consistently assumes positive intentions and praises/prompts others for doing the same • consistently refrains from giving opinion and uses questioning to check others' opinions • consistently suspend judgment and praises/prompts others for doing the same

6. Knowledge Base Development				
Criteria	**Unsatisfactory (1)**	**Developing/Basic (2)**	**Proficient (3)**	**Distinguished (4)**
6.a. Understands systemic oppression and how it is interwoven and affects all pieces of the system	• Fails to assist the client to identify and act upon their sphere of influence and control • Does not engage in conversations with others about oppression • Fails to support clients examine how their interactions and decisions perpetuate the current ways of being	• Inconsistently assists the client to identify and act upon their sphere of influence and control • Engages in conversations with others about oppression • Sometimes supports clients in considering how their interactions and decisions perpetuate the current ways of being	• Assists the client to identify and act upon both their individual sphere of influence and control as well as their influence within the system • Actively names and stands up to oppression and engages in conversations with others about it • Consistently supports clients to examine how their interactions and decisions perpetuate the current ways of being	• Assists the client to identify and act upon both their individual sphere of influence and control as well as their influence within the system and effectively disrupt systemic oppressions • Actively names and stands up to systemic oppression and engages in conversations with others about how to disrupt it • Consistently supports clients to examine how their interactions and decisions perpetuate the current ways of being and encourages clients to effectively disrupt systemic oppressions
6.b. Understands a range of coaching approaches	• Uses a limited number of coaching approaches, regardless of the client or context	• Often uses a variety of coaching strategies and approaches and is often able to adjust their approach based on the needs of the client	• Is fluent in a variety of coaching strategies and approaches and is consistently able to adjust their approach based on the needs of the client	• Is fluent in a variety of coaching strategies and approaches and can anticipate the appropriate approaches based on the needs of the client
6.c. Understands the innovation or practice on which they coach	• Does not identify or explain the importance of key components of the innovation or practice	• Identifies the importance of some key components of the innovation or practice and is developing their knowledge	• Consistently identifies and explains the importance of key components of the innovation or practice	• Consistently identifies and explains the importance of key components of the innovation or practice and can explain the connections to the system as a whole

Appendix C: Type and Frequency of Observation and Supporting Artifacts and Evidence

The Table below outlines the frequency and type of observations during the supporting and summary years. Districts have options to the complete required Evaluation Cycle observations as noted in the options column.

Evidence Source	Definition	Options	Specifics	Tips for Success
Formal Observation(s)	Observation of Coaching Session To protect coach-client confidentiality**, all observations** of the coach **in a coaching session** by the evaluator to gather evidence of practice should be **scheduled** in advance **and pre-approved** by the client(s).	**Summary Year:** One (1) full-length observation (30-45 min.) Or 3 to 4 short (15-20 min. each) observations *following pre- and post-conference processes	Pre-Observation Conference Observation Post-Observation feedback Post-Observation Conference within one week *If frequent, short observations are used, the evaluator and coach still meet prior to observation to determine areas of focus. This conference may include identified components or practices to watch for. Collaborative conversations still occur based on observations to plan the next steps.	Observations should generate evaluative evidence that a) is specific to the coach, b) can be tagged to a component, and c) generates actionable feedback. Coaches or evaluators collect artifacts to support the observation and related feedback before or after the event. Evidence may come from any part of the observation process (pre- or post-conferences, observation, reflections on the observation).
Informal Observation(s)	Natural opportunities to observe the coach by their evaluator to gather evidence of practice. **To protect coach-client confidentiality, **all observations** of the coach **in a coaching session** by the evaluator to gather evidence of practice should be **scheduled** in advance **and pre-approved** by the client(s).	**One-Year Cycle** (new employee Summary Year): 3 informal observations (15-20 min. each) are required in the year, in addition to the 1 formal observation. **Summary Year of Multiple Year Cycle:** 2 informal observations (15-20 min. each) are required, in addition to the full-length formal. or	**Observation Post-observation feedback provided within one week *If frequent, short observations are used, the evaluator and coach still meet prior to observation to determine areas of focus. This conference may include identified components or practices to watch for. Collaborative conversations still occur based on observations to plan the next steps.	(Same as Formal Observations above) During a Supporting Year, peers may conduct observations for formative practice.

Evidence Source	Definition	Options	Specifics	Tips for Success
		A total of 5-7 informal observations in a Summary Year if using more frequent option in place of the full-length, formal observation. **Supporting Years:** A minimum of 1 informal observation per Supporting Year is required.		
Artifacts (High-leverage artifact sets)	Documents or videos that contain evidence of demonstrated practice or CPO implementation and results. *"High leverage artifact sets" are recommended to contextually and efficiently document evidence.*	**Per school year:** Evidence to support the CPO Evidence of Coach practice **Per Evaluation Cycle:** Evidence of **all** Coach practice components Evidence of all CPOs completed within the cycle	Upload as often as possible.	No specific artifacts required by the system. Coaches should consider collecting high-leverage artifacts that support multiple domains or components and provide a rich demonstration of all of coach practice and results. This process may be coach or evaluator driven.

The information in the rest of Appendix C is designed to facilitate the coach collection of evidence for support of the professional practice. It identifies indicators related to each component of the Coach Evaluation Rubric, and sources likely to contain the supporting evidence.

The following tables outline possible evidence sources for each domain of the Coach Evaluation Rubric. Coaches and evaluators are encouraged to consider how artifacts can work together to create a well-rounded picture of the coaching practice. Depending on who the client is (individual/team/system), some of the evidence sources listed may not be applicable.

<table>
<tr><th colspan="2">Domain 1: Reflective Practice
1.a. Develops coaching capacity through professional learning</th></tr>
<tr><th>Indicators/”look-fors”</th><th>Evidence/Artifacts</th></tr>
<tr><td>• Demonstrate self-directed learning
• Networks with other educators and engages in collaborative learning</td><td>• Coach Self Review Results
• Professional Learning Plan
• Professional Learning Certificates of Completion
• Notes/Reflections taken during or after a professional learning opportunity
• Evaluator/Coach conversation
    o Questions, reflections, documentation of conversations</td></tr>
</table>

<table>
<tr><th colspan="2">Domain 1: Reflective Practice
1.b. Develops emotional intelligence and resilience</th></tr>
<tr><th>Indicators/”look-fors”</th><th>Evidence/Artifact</th></tr>
<tr><td>• Regulates and monitors their own emotional state and supports others to do the same.
• Coaching cycle is focused on a goal.
• Coaches are clear about values, beliefs, and biases and provide space to articulate their own.</td><td>• Observation
• Evaluator/Coach conversation
• Questions, reflections, documentation of conversations
• Self-Reflection Form
• Client Survey
• Coaching Service Delivery Plan</td></tr>
</table>

Domain 1: Reflective Practice 1.c. Seeks and applies feedback for self-improvement	
Indicators/"look-fors"	Evidence/Artifact
• Models seeking and using feedback to engage in continued learning and reflection. • Models use feedback to make appropriate changes in practice.	• Observation • Evaluator/Coach conversation • Questions, reflections, documentation of conversations • Client Survey • Professional Learning Plan • Self-Reflection Form

Domain 2: Change Facilitation 2.a Analyzes data, evolving and fluid situations, and systems for the conditions of change	
Indicators/"look-fors"	Evidence/Artifact
• Coach engages in coaching data discussions with a systemic lens. • Supports data-informed decisions that draw from multiple and diverse data sources. • Facilitates the examination of strengths and barriers within the system.	• Coaching Service Delivery Plan • Coaching System Development Worksheet • Self-Reflection Form • Observation • Evaluator/Coach conversation • Questions, reflections, documentation of conversations • Time Log • Client Survey • District/Building Improvement Plan • Implementation Data • Capacity Data

Domain 2: Change Facilitation 2.b Supports client to develop action plans and goals that include evidence-based, high-quality educational practices implemented with fidelity	
Indicators/"look-fors"	Evidence/Artifact

• Facilitates conversation around action items that push on policy, guidelines, and procedures.
• Supports the development of shared leadership.
	• Coaching Service Delivery Plan
	• Coaching System Development Worksheet
	• Self-Reflection Form
	• Observation
	• Evaluator/Coach conversation
	  o Questions, reflections, documentation of conversations
	  o Time Log
	  o Client Survey
	  o District/Building Improvement Plan
	  o Implementation Data
	  o Capacity Data

Domain 2: Change Facilitation 2.c Generates productive conflict (disequilibrium)	
Indicators/"look-fors"	Evidence/Artifact
• Disrupts marginalizing policies, practices, and structures.	• Observation • Coach Self-Reflection • Evaluator/Coach conversation o Questions, reflections, documentation of conversations • Client Survey • Coaching System Development Worksheet • District/Building Improvement Plan • Implementation Data • Capacity Data

Domain 2: Change Facilitation 2.d Expects, attends and mitigates resistance to change	
Indicators/"look-fors"	**Evidence/Artifact**
• Productively addresses resistance to change.	• Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Client Survey • Coaching System Development Worksheet • District/Building Improvement Plan • Implementation Data • Capacity Data

Domain 3: Coaching Conversation Facilitation 3.a. Structures conversations around a cyclical model	
Indicators/"look-fors"	**Evidence/Artifact**
• Begins coaching cycle by prompting clients to reflect on past coaching cycles. • Pushes for connections between individual client actions and goals and the larger system.	• Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Time Log • Client Survey • Coaching Service Delivery Plan • Coaching System Development Worksheet • District/Building Improvement Plan • Implementation Data • Capacity Data

Domain 3: Coaching Conversation Facilitation 3.b. Promotes reflection	
Indicators/"look-fors"	**Evidence/Artifact**
• Encourages clients to reflect on feedback.	• Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Time Log • Client Survey

Domain 3: Coaching Conversation Facilitation 3.c. Challenges Assumptions	
Indicators/"look-fors"	**Evidence/Artifact**
• Uses questioning to deepen thinking and challenge assumptions. • Draws upon the expertise of a client.	• Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Client Survey

Domain 3: Coaching Conversation Facilitation 3.d. Pushes for Details and Depth	
Indicators/"look-fors"	**Evidence/Artifact**
• Identifies focus within a coaching conversation. • Establishes necessary background knowledge. • Identifies possibilities and barriers.	• Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Client Survey • District/Building Improvement Plan • Implementation Data • Capacity Data • Coaching System Development Worksheet

Domain 4: Communication Skills 4.a. Communicates effectively in multiple contexts outside the coaching conversation (e.g., delivering PD, written and verbal communication)	
Indicators/"look-fors"	Evidence/Artifact
• Communicates using asset-based and person first language. • Promotes the use of culturally and linguistically appropriate communication. • Leverages strong emotions to maximize productive outcomes. • Establishes thoughtful communication loops.	• Service Delivery Plan • Professional Learning Evaluation Forms • Written evidence of communication loops* • Email examples* • Time Log * ensure client confidentiality

Domain 5: Relationship Development: 5.a. Builds trust, rapport, and respect with clients and stakeholders	
Indicators/"look-fors"	Evidence/Artifact
• Is confidential in coaching relationships. • Keeps commitments. • Speaks openly about their emotions and encourages others to do the same. • Demonstrates empathy. • Leverages the expertise of others. • Co-creates equal partnerships between coach and client. • Listens for the benefit of the speaker. • Assumes positive intentions. • Refrains from offering opinions and suspends judgment.	• Self-Reflection Form • Observation • Evaluator/Coach conversation o Questions, reflections, documentation of conversations • Client Survey • Service Delivery Plan • Coaching System Development Worksheet

Domain 6: Knowledge Base Development 6.a. Understands systemic oppression and how it is interwoven and affects all pieces of the system	
Indicators/"look-fors"	Evidence/Artifact
• Assists clients to determine what is within their sphere of influence, especially in regards to disrupting systemic oppression. • Actively names and stands up to oppression. • Supports clients to examine how their actions may support the status quo.	• Professional Learning Plan • Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Client Survey • District/Building Improvement Plan • Implementation Data • Capacity Data • Coaching System Development Worksheet

Domain 6: Knowledge Base Development 6.b. Understands a range of coaching approaches	
Indicators/"look-fors"	Evidence/Artifact
• Demonstrates fluency of a variety of coaching stances and engages in them appropriately.	• Professional Learning Plan • Coaching Service Delivery Plan • Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Time Log • Client Survey

Domain 6: Knowledge Base Development 6.c. Understands the innovation or practice on which they coach	
Indicators/"look-fors"	Evidence/Artifact
• Engages in discussions about connections of innovation or practice to the larger system.	• Professional Learning Plan • Coaching Service Delivery Plan • Self-Reflection Form • Observation • Evaluator/Coach conversation ○ Questions, reflections, documentation of conversations • Time Log • Client Survey • District/Building Improvement Plan • Implementation Data • Capacity Data • Coaching System Development Worksheet

Appendix D: At-A-Glance Artifacts Sheet

The following tools can aid coaches in gathering evidence for the evaluation cycle. The tools are simply suggested artifacts and are not required. Coaches may choose any or all of these tools as part of their artifact portfolio.

Name of Tool/ Instrument	Audience	Suggested Method and Frequency of Administration	Suggested Data analysis
Coach Self-Assessment	Individual Coaches Evaluator	Online survey Twice Annually	Tracking patterns and trends related to the self-reported need for support. Informs individual professional practice goals and system improvement goals.
Coach Reflection Logs	Individual Coaches Evaluator	Online survey After each unique coaching session	Patterns and trends of professional growth of coaches within one year and across all years to inform professional learning through support, coaching, and practice
Coach Time Logs	Individual Coaches	Online (or paper) survey Monthly	Patterns and trends of professional growth of coaches within one year and across all years to inform professional learning through PD support, coaching and practice
Client Feedback Form	Individual Coaches Coach Clients	Online Survey After each unique coaching session submitted anonymously	Patterns and trends of professional growth of coaches within one year and across all years to inform professional learning through PD support, coaching and practice
Announced Observation Form	Evaluators Individual Coaches	Completed at each unique announced observation session throughout the evaluation cycle	Progress of professional growth of coaches within one year and across all years to inform professional learning through PD support, coaching and practice
Coaching Services Delivery Plan	Individual Coaches Coach Clients	Completed for each unique coaching cycle	Progress of professional growth and progress toward CPO within and across coaches
Professional Learning Plan	Individual Coaches Evaluators/ Administrators	Completed annually	Progress of professional growth of coaches within one year and across all years to inform professional learning through PD support, coaching and practice

Appendix E: CPO Quality Indicator Checklist

The Quality Indicators are a list of best practice processes and procedures for each area of the CPO. The orchestra of all these actions throughout the CPO interval can lead to the improved impact of a coach's practice. Quality Indicators can guide the CPO development, progress monitoring, and goal review. The list also provides a framework for the determination of individual process strengths and areas for improvement through the coach Self-Summary at the end-of-interval for each CPO as well as end-of-cycle feedback with the evaluator.

Quality Indicators
Baseline Data and Rationale
The coach used multiple data sources to complete a thorough review of the client or program needs data, including subgroup analysis.
The coach examined data and considered a client or program equity in the goal statement.
The data analysis supports the rationale for the chosen CPO.
The baseline data indicates the individual starting point for each client or program success included in the target.
Focus
The CPO is aligned to specific coaching standards representing the critical area for growth within the client's or program's need area.
The coaching standards identified are appropriate and aligned to support the area(s) of need and the client population or targeted program change identified in baseline data.
The CPO is stated as a SMARTE goal.
Client Population or Targeted Program
The client population or the program identified in the goal(s) reflects the results of the data analysis.
Targeted Client Growth or Program Change
Growth or change trajectories reflect appropriate gains for clients or changes in program functioning, based on identified starting points or benchmark levels.
Growth or change goals are rigorous, yet attainable.
Targeted growth or change is revisited based on progress monitoring data and adjusted if needed.
Time Interval
The interval is appropriate given the CPO.
The interval reflects the duration of time (coaching cycle) that the coach is engaged with the target client population or program.
Mid-point checks are planned, data is reviewed, and revisions to the goal are made if necessary.
Mid-point revisions are based on strong rationale and evidence supporting the adjustment mid-course.

Artifacts/Evidence Sources
The methods of measurement chosen to serve as evidence appropriately measure intended growth or change goals.
Methods of measurement are valid, reliable, fair, and unbiased for all members of the target client population or program.
The evidence reflects the strategic use of measurement tools.
Progress is monitored continuously, and an appropriate amount of evidence can be collected in time for use in the End-of-Cycle Summary Conference. (*Note: The amount of evidence available may vary by coach role*).
Coach-created rubrics, if used to measure client growth or program change, have well-crafted performance levels that: • Clearly define levels of performance; • Are easy to understand; • Show a clear progression to the intended outcome(s).
Strategies and Supports
Strategies reflect a differentiated approach appropriate to the target population or program.
Strategies were adjusted throughout the interval based on formative practices, interim assessments, and progress monitoring data.
Collaboration with others is indicated when appropriate.
Appropriate professional development opportunities are addressed.
CPO End-of-Interval Self-Summary
Indicates accurate and appropriate levels of performance on the six (6) rubric criteria.
Indicated levels are substantiated by client or program data and evidence of implementation process.

Appendix F: CPO Summary Rubric

Criteria	Level 1	Level 2	Level 3	Level 4
Goal Setting	The coach sets an inappropriate goal(s) or did not consider any data sources.	The coach sets a goal(s) based on the analysis of required or supplemental data sources.	The coach sets goal(s) based on the analysis of all required and supplemental data sources.	The coach sets rigorous and appropriate goal(s) based on a comprehensive analysis of all required and supplemental data sources.
Measurement Practices	The coach consistently used inappropriate measurement practices.	The coach inconsistently used appropriate measurement practices.	The coach consistently assessed clients or programs using appropriate measurement practices.	The coach consistently assessed clients or programs using strategic, appropriate, and authentic measurement practices.
Monitored Client or Program Progress	The coach did not monitor progress.	The coach infrequently monitored progress using evidence/data.	The coach frequently monitored progress using evidence/data.	The coach continuously monitored progress using evidence/data.
Reflection	The coach inconsistently and inaccurately reflected on client, program, and individual practice evidence/data.	The coach consistently reflected on client, program, and individual practice evidence/data.	The coach consistently and accurately reflected on client, program, and individual practice evidence/data and made connections between the three.	The coach consistently and accurately reflected on client, program, and individual practice evidence/data and consistently and accurately made connections between the three.
Adjustment of Practice	The coach did not adjust practice based on evidence/data or reflection.	The coach inconsistently and inappropriately adjusted practice based on evidence/data and reflection.	The coach consistently adjusted practice based on evidence/data and reflection.	The coach consistently and appropriately revised practice based on evidence/data and reflection.
Outcomes	The coaching process resulted in no client growth or program change.	The coaching process resulted in minimal client growth or program change.	The coaching process resulted in client growth or program change.	The coaching process resulted in exceptional client growth or program change.

Wisconsin Department of Public Instruction • Carolyn Stanford Taylor, State Superintendent

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION