

DEFINING INSTRUCTIONAL COACH ROLES TO PROVIDE EQUITABLE EXPERIENCES FOR NEW TEACHERS

Janet Kimbriel, M.Ed.

Texas A&M University - Commerce

April Sanders, Ph.D.

Texas A&M University - Commerce

Kathryn Dixon, Ph.D.

Texas A&M University - Commerce

Laura Isbell, Ph.D.

Texas A&M University - Commerce

Abstract

This study examined the unique role of instructional coaches and how they can play a critical role in school-wide systematic change. A qualitative case study approach was utilized to examine how the role of an instructional coach in one school district was defined within the context of situated learning theory. Results were grouped based on three tenets of situated learning theory: situated in context, social (MKO), and inclusive tools of practice. Findings indicated the need for consistent and equitable mentor/coach models as a means for cultivating transformative change.

Keywords: Instructional coaching, mentoring, situated learning theory, transformative change

The role of instructional coaching has not always been clearly defined as a person of support in the K-12 schools, but school districts are attempting to curate this role through their instructional coaching positions and better prepare and retain novice teachers entering the profession. The expansion of intentionally trained instructional coaches in school districts could be one way to create a systemic change impacting how educators who are new to the field can be supported during the critical first few years of teaching when teacher attrition is most common. Teachers leaving the profession not only has a negative impact on student performance and success (Schleicher, 2018; Carver-Thomas & Darling-Hammond, 2019) but also on our economy (Sorensen & Ladd, 2020). As a result of this level of impact to students, the school district creates and provides a strong support structure that helps novice teachers establish themselves in the profession as they begin their career.

To accomplish the feat of meeting the unique and varied needs of new teachers through equitable experiences, the role of *instructional coach* should not only be defined but aligned with research-based models, and to do this, the preparation of instructional coaches can be crucial to developing strong supportive structures for new teachers. Aguilar (2013) utilizes a transformative approach to coaching which incorporates strategies from directive and facilitative coaching, as well as cognitive and ontological coaching. Transformational coaching can lead to changes in systems, affecting behaviors, beliefs, and institutional and educational social systems (Aguilar, 2013). Fullan and Knight (2011) support the idea of coaches as system leaders and that the role should be developed with the purpose of systemic change. Not all instructional coaches will be exact replicas of one another but rooting the role in research will provide a much better avenue for designing this role in a district.

The intent of this study was to identify the core practices and conditions that contribute to a high-quality

mentor/coaching program for first year teachers. To examine and identify these practices in one North Texas school district, situated learning theory (Lave and Wenger, 1991) informed interview sessions that focused on effective coaching and opportunities for new teacher growth under skilled teacher mentorship within the classroom and school context.

Literature Review

Teacher coaching has a deep history in educational practice. Pioneering work by Joyce and Showers in the 1980's helped to build the theory and practice of teacher coaching as well as some of the first empirical evidence of its promise (Joyce & Showers, 1982). With the addition of coaching, teachers apply their learning more frequently and consistently as they improve their reflective practice and engage in collaborative planning (Neufeld & Roper, 2003). According to Joyce and Showers (1981), "coaching is characterized by an observation and feedback cycle in an ongoing instructional or clinical situation" (p.170). Instructional coaching can be effective for both classroom level change (Darling-Hammond et al., 2009; Sailors & Price, 2015) and system level change (Aguilar, 2013; Fullan & Knight, 2011). Sailors and Price (2015) outline four exchanges teachers can participate in: (1) guided participation where the coach demonstrates a lesson and the teacher purposefully observes through guided questions; (2) co-teaching where the coach and teacher participate in planning and teaching a lesson together including a pre-conference and post-conference; (3) guided reflection where the coach documents a lesson by the teacher while collecting data discussed at the pre-conference; or (4) guided conversations between the teacher and coach discussing the teacher's areas of need and the coach supporting by with providing resources, sharing ideas, and brainstorming. All four exchanges are examples of situated learning in a coaching model that resulted in student gains and improved instructional practice. Sailors & Price (2015) found that interactions between coaches and teachers resulted in the coaches' behaviors influencing teachers' instructional practice, with coaching continuing to be a best practice to improving instructional practices of reading teachers. Research shows an increase in teacher performance and student outcomes when coaching practices are implemented with highly effective and trained coaches who implement coaching models, reflective practice, accountability and consistent interaction and feedback (Darling-Hammond et.al., 2009).

Although there are a variety of models and approaches to instructional coaching, researchers agree that there are certain tenets included in an effective coaching model beginning with the selection criteria of the instructional coach. Coaches must be knowledgeable about their content area, district reform goals, achievement standards and adult learning with strong communication and interpersonal

skills (Neufeld and Roper, 2003; Aguilar, 2013, Knight 2016). The Annenberg Institute for School Reform (AISR) at Brown University identifies three components to include in a well-defined coaching system: (1) Creating structural conditions that support effective coaching (2) A guided, content-based focus on adult learning, and (3) Instructional leadership by coaches.

Researchers agree that coaching effectiveness begins by clearly defining the role of the instructional coach and developing a framework that articulates the roles within the coaching model (Aguilar, 2013; Miller & Stewart, 2013). In addition, a strong understanding of adult learning, relationship building and utilizing data to support coaching strategies and professional development contribute to the effectiveness of the coaching program (Knight, 2016; Aguilar, 2013; Miller & Stewart, 2013). There is little agreement as to what an exceptional, or even adequate, instructional coaching preparation program should look like (Lucas, 2017). Although many exceptional teachers are promoted to the role of instructional coach, it is important to note that coaching requires a different skill set than effective teaching. Adult learners have different needs than students. Andragogy theory explains this difference in the way adults come to learning environments with background knowledge and experience that can reinforce or take away from new learning (Cox, 2015). Instructional coaches who are well versed in adult learning theory will be better prepared to address those different learning needs which will help support an equitable coaching program. Characteristics of an effective coaching program include, building strong relationships (Fullan & Knight, 2011), providing opportunities for teachers to observe one another, provide feedback and create structured times to meet and plan.

Researchers have found that while many approaches to instructional coaching exist, there is little agreement on the exact role of an instructional coach and the best approaches to coaching (Darling-Hammond et al., 2009; Fullan & Knight, 2011). Additionally, recent studies have revealed an imbalance of equity in instructional coaching practices where discussions of bias and inequities are missing from coaching training (Orange et. al., 2019). As a result, coaching frameworks with an explicit focus on equity are being developed and provided at professional institutions (e.g., Learning Forward, 2021).

Theoretical Framework

Situated learning theory was developed by Lave and Wenger (1991) to preserve the learning style of a traditional apprenticeship and engage in learning as legitimate peripheral participation within communities of practice. These changes of relations happen through the dynamic process in which the newcomers gradually become old timers through peripheral participation to full

participation in the communities of practice (Lave & Wenger, 1991). As part of an educative experience, practice-based learning in a professional community is found in both university and school based settings (Hodge et al., 2011; Reddan, 2015). These situations of applied practice are seen during field based or internship experiences at the university level and as PLCs and mentorship programs at the district level. In this study, the community of practice is the situated classroom in which mentors create strategic learning experiences (Welch & Carter, 2018) that expand the skill set and current understanding of the first year teacher. Situated learning theory (Lave & Wenger, 1991) is one lens for viewing research related to the role of instructional coaches; this theory encourages learning that is in context, utilizes feedback, and incorporates the right tools. Expanding on this theory, Putnam and Borko (2000) suggest that in order to become fully participatory in their community of practice, learners must have access to learning experiences that are social, situated, inclusive of tools of their practice, and built around discussions with knowledgeable others. In the context of this study, the more knowledgeable other (Vygotsky, 1978) is the instructional coach providing opportunities for novice teachers to participate in a community of practice as they engage in a variety of coaching models, reflective practice, co-teaching, and reflective discussions that lead to actionable next steps.

Methodology

Using a qualitative case study approach, we examined how the role of an instructional coach can be defined within the context of situated learning theory. The case study is most closely related methodologically to Merriam's (1988) definition of a qualitative study in that assessing the role of the instructional coach cannot be measured fully in the format of the positivist quantitative inquiry. This study was guided by the following research questions:

- What are the key elements included in the training and coaching new teachers receive from the educator preparation program's (EPP) partner school district?
 - What coaching models are utilized by an instructional coach in the mentorship program?
- In what ways does an instructional coach's approaches align with situated learning theory?
 - In what ways does the implementation of an instructional coaching program align with the initial intent and design?

The participant included in this case study is the Director of Recruitment and Retention in a school district located in the southwest region of the United States. In her role, she created and now manages the district's mentor program, which provides mentorship to new teachers

across 20 schools over a three-year period. Each school has a designated lead mentor who works directly with the participant. In addition to the development of the program, the participant collaborates with school principals to hire both lead mentors and campus mentors. The participant develops and presents curriculum and training to the lead mentor teachers to disseminate to campus mentor teachers

Data collection included two semi-structured interviews that focused on the participant's role in implementing the mentor program in her district. Participation was strictly voluntary. Interviews were conducted and recorded over Zoom and then uploaded into Sonix for transcription. Key documents referenced in the interview were provided by the participant and included: (a) selection criteria used in selecting mentors for the program, (b) training topics for the program, and (c) roles and responsibilities associated with the position including procedures at milestone points and data collection. These documents were used to clarify explanations given during the interview and to provide additional insights into the participant's description of certain aspects of her role.

Using the descriptive coding method (Miles & Huberman, 1994; Wolcott, 1994), Author 1 assigned descriptive codes summarizing the responses to each of the interview questions. After determining descriptive codes, the researchers worked collectively with axial coding to find themes that emerged. According to research by Saldana (1994) descriptive coding "summarizes in a word or short phrases – most often as a noun – the basic topic of a passage of qualitative data" (p. 70). The emerging themes were connected to the main tenets of situated learning: situated in context, social interaction with a more knowledgeable other (MKO), and inclusive of the tools of practice (See Table 1). Key documents referenced during the interviews were used to add clarification when reviewing the themes.

Results

Table 1

Emerging Themes and Tenets of Situated Learning

Situated Learning	Emerging Themes
1 Situated in Context	<ul style="list-style-type: none">● Mentor Selection● Basis of Coaching Style (participant's own experience)● Role as Coach
2 Social (MKO)	<ul style="list-style-type: none">● Mentor Selection● Meetings with Mentors/Mentees● Role as Coach
3 Inclusive of Tools of practice	<ul style="list-style-type: none">● Mentor Selection● Self-Care● Procedures/Routines

\Situated in Context

The participant and campus principals are the key people identifying and selecting mentors to serve as coaches for new teachers; the application process was created using open-ended questions that connected with the participant's own first year teaching experience. Those questions serve as a guide that the participant believes will help her find the best mentors. Some mentors do apply hoping participation will lead to movement into leadership positions in the district, but the program director prefers to select mentors that "just love working with new teachers."

The development of the mentor program occurred through the program director's situated perspective. Instead of basing the coach's role on data or literature, the participant discussed how she developed the role based on her own needs from her first year of teaching: "I did start the mentor program just because I can remember my first year." She goes on to explain how in her first year she herself moved through the Moir's (1999) chart of how new teachers experience emotions throughout the first year of teaching. That cycle of emotions was similar to her own experience, and she "feel[s] like all teachers go through this whole process, even though the months may vary. [She] feel[s] like they all go through the process," thus she believed it should be a marker for understanding and developing this program. Therefore, the program director facilitates coaching development monthly with lead mentors, through a book study and journal reflection specifically aligned to Moir's (1999) chart which identifies six phases every new teacher goes through in their first year (anticipation, survival, disillusionment, rejuvenation, reflection and anticipation). As new teachers move through the phases, mentors are trained on specific coaching techniques that are needed at each phase.

The participant serves as the program director, but she sees herself as the lead coach for the mentors in the program who are coaching new teachers during their first year. Further, the program director created the roles and responsibilities for the mentors based on her own experience and observations as a teacher and coach: "And so we have kind of evolved that position. So, they are the liaison between me and the campus." Throughout the interviews, she emphasizes how situated context (related to her own experience) has shaped and continues to guide the development and implementation of the training for coaches. Classrooms for observations are selected by the participant based on the needs of the new teacher cohort each year. For example, if support is needed for classroom management, mentees will observe and reflect on classrooms that support best practices in management. Even though the participant did say observations are selected based on the specific cohort needs, she provided a list of top priorities that are typical of each year and heavily influenced by her own experience as a first-year teacher.

The top priorities in my mind would be they've got to get their classroom set up, obviously, and they really need to have an idea of what their classroom procedures and expectations and consequences are going to be, because if they can't get that established and running smoothly from the beginning, then really, it's going to be a terribly chaotic year for them.

Social (MKO)

The second structure identified was situated learning in the natural social environment in tandem with a more knowledgeable other (MKO). The participant believed that having a MKO is important to this process, but her view of how the MKO operates is not in line with a coaching model using a MKO. Although the participant outlined that campus mentor selection was a collaborative effort between the program director and campus administrators, the participant detailed several instances when she sees herself as the MKO by overriding the administrator's choice of mentor. She stated, "I would have never picked a counselor as a mentor. Her role as a counselor was not really helpful for modeling a lesson or giving constructive feedback." The participant then provided more context about the mentor selection: "Ultimately, the decision to find and pair campus mentors with new teachers in the program is based on the participant's experience of knowing what new teachers need and because campus mentors are "in the trenches as well."

The program is intended for mentors and new teachers to do classroom observations, group training, modeling, and twice-weekly mentor/mentee check-in meetings. The participant explains the progression of the program throughout the school year which consists of encouraging the pairs to meet and answer open-ended questions to better understand the new teacher's stress level and form a relationship. In late October, the pairs are asked to observe each other and provide feedback regarding pedagogy, but this has not been fully implemented as she further explains:

My ultimate wish is that the lead mentor could be the instructional coach on the campus and could work solely just doing that. That's not an option, so my goal is to be on campuses and in classrooms and watching the instruction and making sure that they are using the framework that [school district] has established for what good teaching looks like...So that's my undertaking at the moment. And it's huge. And I don't speak very cohesively about it because it's still in my brain and hasn't been mapped out on paper.

Throughout the meetings between mentor and new teacher, the mentor has been instructed to take the lead in helping the new teacher work through various logistics at the beginning of the school year regarding grades, classroom rules and procedures, and communication with parents. By taking the role of MKO who is conveying knowledge, the campus mentor can show the new teacher how to handle daily tasks that fall outside of the instructional role of a classroom teacher. In addition, lead mentor teachers and the program director participate in monthly meetings where data are shared and professional development is created based on the data. At every layer of the program, there is a top-down approach for conveying

knowledge. The program director creates the training presentation given to the lead mentors, who then provide training to the campus mentors, and from there, campus mentors use the content of the presentation to inform new teachers.

Inclusive of Tools of Practice

The final structure involves using inclusive tools of practice aligned with the ISD's framework that communicates good teaching practices of the district including what the mentor's role looks like monthly and how to report data collection and documentation. The tools primarily consisted of handouts, strategies, and other resources that help novice teachers navigate management systems in their classroom or the school. One example involves mentors referencing a list of questions to guide their observation of classroom management such as, "Did the teacher greet students at the door? Did the students know what to do when the class began? Did the teacher have the objectives displayed and go over them?" Other tools included a list of topics to discuss with mentees at weekly check-ins such as classroom management, implementing rules and procedures, how to address the needs of diverse students, and self-care. In fact, self-care was a major element that occurred throughout the data signaling that it was a prominent feature of the coaching practice. To begin the process of relationship building, the program director created a "one pager" document with the purpose of identifying who her First year teachers are and how she can best support them individually. The document contained the teachers' top 5 Gallup strengths, how they like to be recognized, a "favorites" section, and personality-based questions geared toward identifying their emotional intelligence. Mentor selection was based on the ability to provide tools or support to new teachers, as well as an emphasis on implementing self-care as a tool of practice for navigating the profession during the first year was an important part of the program's focus. Since those two aspects were the primary aspects used to help make the selection of mentors, it was not surprising that both aspects were evident in the data.

Discussion

This study provides us with insight into one way a mentor program is developed and implemented as a support structure for new teachers and demonstrates a need for consistency in mentor/coach selection and implementation of effective coaching practices. Although duties were defined in this study, there was not a coaching training requirement or specific coaching model to implement while working with novice teachers. The pairings are heavily focused on sharing resources and creating relationships between the mentor and mentee. Additionally, the program creation is rooted in the specific experience of the program director. The intention of creating a mentor program is

commendable, but in order for the program to be effective, specific coaching practices need to be implemented.

Further Implications

Research also identifies inconsistencies in coaching practice, instructional coaching requirements, and a weak understanding of the job duties which are often layered with other duties unrelated to coaching (Fullan, 2011). The experience of the program director is helpful and should be used as one source for the program, but a wider set of sources as well as theoretical models should be used to formulate a coaching program that helps support novice teachers dealing with a range of needs. In order for a successful coaching program to be implemented and lead to systems change, criteria for this position should be similar to that of a reading specialist, where extensive knowledge of methods is learned through a master's program and the position in the district is clearly defined. Not all instructional coaches are defined by the same criteria, but a level of consistency of what is needed across all coaching environments would be helpful to districts seeking to add this role. A coaching master's degree or certificate could ensure highly effective coaches who are trained in various coaching methods and adult learning theory. The position would be clearly defined by the district with the purpose of improving new teacher instructional practice and student learning outcomes.

Conclusion

The consistent use of a model for instructional coaching can be powerful and transformative, especially when using situated learning as a foundation. However, the coaching model should align with the specific needs of new teachers on the campus instead of simply employing a top-down, one-size-fits-all approach. Situated learning is one way to meet those specific needs by looking at context, tools of the practice, and social interactions. These tenets of situated learning can be a strong way to look at the specific needs of teachers and connect novice teachers with mentors who can coach them through those first years. Using limited experiences instead of researching key needs can be avoided through preparation of instructional coaches that includes theory, strategies, coaching techniques, and valuable pathways for building a coaching program. With more focus on supporting novice teachers, additional focus should be on those providing and building that supportive structure.

References

- Aguilar, E. (2013). *The art of coaching: Effective Strategies for School Transformation*. John Wiley & Sons. ISBN-10: 1118206539 ISBN-13: 978-1118206539
- Carver-Thomas, D., & Darling-Hammond, L. (2019). The trouble with teacher turnover: How teacher attrition affects students and schools. *Education Policy Analysis Archives*, 27, 1-32.
- Cox, E. (2015). Coaching and adult learning: Theory and practice. *New Directions for Adult and Continuing Education*, 14, 27–37. <https://doi.org/10.1002/ace.20149>.
- Darling-Hammond, Linda & Wei, Ruth & Andree, Alethea & Richardson, Nikole & Orphanos, Stelios. (2009). *Professional Learning in the Learning Profession: A Status Report on Teacher Development in the United States and Abroad*. Dallas TX. National Staff Development Council
- Fullan, M. & Knight, M. (2011). Coaches as system leaders. *Educational Leadership*, 69(2), 50–53.
- Hodge P., Wright S., Barraket J., Scott M., Melville R., Richardson S. Revisiting how we learn in academia: practice-based learning exchanges in three Australian universities. *Stud Higher Educ*. 2011; 36(2): 167–183.
- Joyce, B. R., & Showers, B. (1981). Transfer of training: The contribution of “coaching.” *Journal of Education*, 163(2), 163-172. <https://doi.org/10.1177/002205748116300208>
- Joyce, B., & Showers, B. (1982). The Coaching of Teaching. *Educational Leadership*, 40, 4- 10.
- Knight, J. (2016). *Better conversations: Coaching ourselves and each other to be more credible, caring, and connected*. Thousand Oaks, CA: Corwin.
- Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. New York, NY: Cambridge University Press.
- Lucas, L. (2017). Preparing instructional coaches for teachers in America’s public schools. *Philosophy of Coaching: An International Journal* 2(1), 28-43. Retrieved from <http://dx.doi.org/10.22316/poc/01.1.03>
- Merriam, S. B. (1988). *Case study research in education: A qualitative approach*. San Francisco, CA: Jossey-Bass.
- Miles, M.B., & Huberman, A.M. (1994). *Qualitative data analysis (2nd ed.)*. Thousand Oaks, CA: Sage Publications.
- Miller, S., & Stewart, A. (2013). Literacy learning through team coaching. *Reading Teacher*, 67(4), 290-298. doi:10.1002/trtr.1219
- Moir, E. (1999). The stages of a teacher’s first year. In M. Scherer (Ed.). *A better beginning: Supporting and mentoring new teachers*. (pp. 19-23). Alexandria, VA: Association of Supervision and Curriculum Development.
- Neufeld, B. & Roper, D. (2003). *Coaching: a strategy for developing instructional capacity; promises and practicalities*. Washington DC: The Aspen Institute.
- Orange, T., Isken, J., Green, A., Parachini, N., & Francois, A.. (2019). Coaching for Equity. *The Journal of Staff Development*, 40(6), 45–49.
- Putnam, R. T., & Borko, H. (2000). What Do New Views of Knowledge and Thinking Have to Say About Research on Teacher Learning? *Educational Researcher*, 29(1), 4–15. <https://doi.org/10.3102/0013189X029001004>
- Raddan, G. (2015). Enhancing students’ self-efficacy in making positive career decisions. *Asia-Pacific Journal of Cooperative Education*, 16(4), 291–300.
- Sailors, M., & Price, L. (2015). Support for the Improvement of Practices through Intensive Coaching (SIPI): A model of coaching for improving reading instruction and reading achievement. *Teaching and Teacher Education*, 45, 115–127. <https://doi.org/10.1016/j.tate.2014.09.008>
- Saldana, J. (2009). *The coding manual for qualitative researchers*. Los Angeles, CA Sage.
- Schleicher, A. (2018). *Valuing our Teachers and Raising their Status: How communities can help* (International summit on the teaching profession). OECD Publishing.
- Sorensen, L.C., & Ladd, H.F. (2020). The hidden costs of teacher turnover. *AERA Open*, Vygotsky, L. S. (1978). *Mind in society: The development of higher psychological processes*. Cambridge, MA: Harvard University Press, 6, 1-24.
- Vygotsky, L. S. (1978). *Mind in society: The development of higher psychological processes*. Cambridge, MA: Harvard University Press.
- Welch, & Carter, M. (2018). Deliberate Practice and Skill Acquisition in Nursing Practice. *The Journal of Continuing Education in Nursing*, 49(6), 269–273. <https://doi.org/10.3928/00220124-20180517-07>.
- Wolcott, H.F. (1994). *Transforming qualitative data: Description, analysis, and interpretation*. Thousand Oaks, CA: Sage.