

Teachers Leading Teachers:  
The Experiences of Peer Assistance and Review Consulting Teachers

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This paper was prepared for the 2009 Annual Meeting of the American Educational Research Association, San Diego, CA, April 13-17.

This research was generously supported by grants from Al and Katharine Merck and the Bill and Melinda Gates Foundation. The views expressed are solely those of the authors.

## **Introduction**

To meet the challenges of standards-based accountability, schools and districts increasingly rely on skilled, experienced teachers to lead their colleagues in large-scale improvement efforts. These teacher leaders demonstrate lessons, observe and provide direct feedback to their peers, and in some cases, evaluate their performance. In significant ways, these activities diverge from those of the traditional teacher, whose responsibilities on the first day of his or her career are identical to those on the last day. Thus a growing number of expert teachers work in new roles as instructional coaches or staff developers with responsibilities that differ from those of both administrators and classroom teachers.

In what has been described as the “flat” career of teaching, the most common route for a teacher to become a leader has been to become an administrator. Other leadership positions either have not existed, have faded quickly after being introduced, or have met with considerable resistance from other teachers (Donaldson, et al., 2008; Hart, 1990; Little, 1988). Research shows that teachers in recently implemented instructional leadership roles face resistance from their peers, who question the authority and legitimacy of their role. Peers ask, “What makes you better than the rest of us?” and “What gives you the right to tell me what to do?” Many teacher leaders express frustration when their reform efforts are rebuffed (Berg, et al., 2005; Donaldson, et al., 2008; York-Barr and Duke, 2004).

This study investigates a teacher leadership role found in the Peer Assistance and Review (PAR) programs of seven local districts. In these programs, expert teachers serve as coaches and evaluators of their peers. In contrast to the experiences of teacher leaders in most other settings, Consulting Teachers (CTs) said that they were able to give critical feedback and instructional advice to peers and to make formal recommendations, which districts used in deciding whether

to rehire or dismiss teachers. In so doing, the CTs acted contrary to traditional norms of teaching.

Within these PAR programs, CTs reported feeling successful and satisfied in their role. This CT's comment was typical: "It was a fabulous experience for me" (SJUSD CT 22). In particular, CTs found rewards in helping teachers improve their practice. Many echoed a Minneapolis CT, who said that the best part of the role was that she got to "see people improving all the time" (MNCT 13). CTs widely reported having more influence on other teachers' practice than they could as a classroom teacher. How were these CTs able to accomplish what other teacher leaders are seldom found to do? This study examines CTs' experiences, the components of their work, and the factors these teacher leaders said made it possible for them to carry out the role of CT.

### *The traditional teaching career*

The teaching career has historically been "flat," with unvarying job responsibilities (Lortie, 1975). Unlike other professions, teachers traditionally have not assumed increasing responsibility outside their classroom, even though they gained experience, knowledge, and skills. A norm of "egalitarianism" has long existed among teachers, whereby all are seen to be equally skilled and knowledgeable (Johnson, 1990; Lortie, 1975). Even teachers' pay and privilege are based on a uniform scale, typically determined by years of experience and accrued graduate credits, rather than demonstrated expertise (Odden and Kelly, 2002). Under these conditions, any teacher's presumption of greater expertise has traditionally been viewed with suspicion by peers (Donaldson, et al., 2008; Johnson, 1990; Lortie, 1975). Traditional markers of career development found in other professions—increased pay, differentiated titles, status, supervisory authority, decision-making authority—are rarely found in a teacher's career.

### *Teacher leadership roles*

For decades, however, reformers have called for greater differentiation in the teaching career. In 1986, the Carnegie Forum on Teaching and the Economy issued its landmark report, *A Nation Prepared*, recommending new positions for Lead Teachers. These roles were meant to improve schools and provide an opportunity for career development among teachers.

Subsequently, many districts introduced such roles and basic career ladders. However these efforts met with mixed success and most faded over time (Donaldson, 2005; Hart, 1995). The most consistent finding regarding these leadership roles was their effect on the teacher leaders, themselves, who tended to feel greater degrees of motivation and engagement in their work (Smylie, 1992; York-Barr and Duke, 2004). At the same time, however, teachers in these early leadership roles often reported that they experienced uncomfortable relationships with peers as they navigated new hierarchies in the workplace (Little, 1988; Smylie, 1992; York-Barr and Duke, 2004).

Recently, instructional leadership roles for teachers have increased in number (Mangin and Stoelinga, 2008; York-Barr and Duke, 2004). Research about these roles is still inconclusive (Lord, Cress, and Miller, 2008; Mangin, 2008), although it is clear that these roles continue to be difficult to carry out and the teachers who hold them report encountering resistance from their peers (Donaldson, et al, 2008; Stoelinga, 2008). These relationships are particularly challenging when the role involves teachers giving critical feedback in order to improve their peers' instruction (Donaldson, et al., 2008; Stoelinga, 2008; Lord, Cress, and Miller, 2008). In an effort to make their work seem less threatening to colleagues, teacher leaders often dilute their message or take other actions to reduce peer resistance, which may limit the effectiveness of their role (Donaldson, et al., 2008).

## **The CT Role in PAR Programs**

In districts with PAR programs, CTs serve as instructional coaches, usually working with all novices and selected underperforming veteran teachers who have been referred to the program by their principals. CTs regularly observe and advise teachers in their caseload in an effort to help them meet the district's performance standards. As an instructional coach, the CT may co-plan curriculum, model lessons, assess student work, or arrange a visit to another expert teacher's classroom. The CT provides ongoing feedback (usually weekly or bi-weekly) to the novice or veteran teacher about her teaching. In addition to providing regular coaching support, CTs conduct formal observations of each teacher with whom they work, periodically submitting written reviews to program officials. At meetings of the PAR Panel—a committee of teachers and administrators that oversees the PAR program—the CT reports whether each of the teachers in her caseload has met the district's expectations for good teaching. The Panel uses this information in deciding whether to recommend to the superintendent that the teacher should be retained or dismissed. In almost every case, the district endorses the CT's assessment of a teacher's performance.

Case studies of PAR programs indicate that the CT role is overall a positive experience for those who serve in it (Fiarman, 2005; Koppich, 2004; Koppich, et al., 2002). However, there is virtually no research on the CTs' own experiences of the leadership role, nor is there research comparing CTs' experiences across different programs.

### *Research Questions and a Preview of Findings*

This study examines the teacher leadership CT role to determine what structures and expectations influenced teachers' experiences in the role across seven districts. The research questions include:

1. How is the role of Consulting Teacher within a Peer Assistance and Review program designed and implemented in seven districts?
2. How do teachers who currently hold or previously held Consulting Teacher positions describe their experience in the role?
3. What components of this role do CTs report are important in enabling them to carry out their responsibilities?

We found that the CTs were able to do their work effectively because various components of the program strengthened and reinforced the legitimacy and authority of their role. Because the CT's work was formally authorized and defined by labor and management in the teachers contract and district policies, it enjoyed unusual acceptance among teachers and administrators. An advertised and rigorous selection process ensured that the program hired CTs who would be respected and could do the work well. In addition, the procedures by which CTs carried out their work were well specified and accepted by all parties. Also, CTs based their performance assessments on the district's clearly defined teaching standards, which provided an authoritative foundation for their work as they assisted and then reviewed teachers in their caseload. Also, CTs were supported by training both before and during the term of their appointment. Finally, being directly accountable to the PAR Panel gave CTs the sense of obligation and resolve they needed to carry out unfamiliar and, at times, uncomfortable work. In the discussion that follows, we first describe the research methods, then discuss each of these findings in turn before considering their implications for policy and practice.

### **Research Methods**

This research is part of a larger study undertaken by the Project on the Next Generation of Teachers (PNGT). We collected data from seven districts in five states. Pairs of researchers

visited each district and interviewed 25-30 stakeholders, including principals, union leaders, district administrators, those responsible for governing the PAR program, as well as current and former CTs. We investigated many aspects of the PAR program, including financial costs and benefits, union-management collaboration, the role of principals, and teacher leaders' experiences in the role. This analysis of teacher leaders' experiences of the CT role focused on a subset of these interviews.

The sample includes seven districts: Montgomery County Public Schools (MCPS), MD; Minneapolis Public Schools (MPS), MN; Syracuse City School District (SCSD), NY; Rochester City School District (RCSD), NY; Toledo Public Schools (TPS), OH; Cincinnati Public Schools (CPS), OH; and San Juan Unified School District (SJUSD), CA. We sought to include variation in our site sample by choosing districts with different amounts of experience with the program and different elements of program design (See Table 1).

**Table 1. District Characteristics and Programmatic Features During School Year 2008-09.**

	Toledo	Cincinnati	Montgomery County	Rochester	San Juan	Minneapolis	Syracuse
Urbanicity	Urban	Urban	Urban/ Suburb	Urban	Urban/ Suburb	Urban	Urban
Total number of students	30,423	36,872	139,398	34,096	48,325	38,538	22,123
Total number of teachers	1,852	2,357	9,371	2,861	2,267	2,250	1,856
Union affiliation	AFT	AFT	NEA	AFT	NEA	NEA/AFT	AFT
Number of years implementing PAR	27	23	6	21	8	24	3
Typical number of CTs per year	10-12	15	30-40	150-200	6	8	6

We interviewed teachers who, at the time of the study, were or had been a CT within a PAR program. They had been identified by a local contact person, often the PAR director or Panel co-chair. In each district, we asked to speak with a range of CTs, emphasizing that we wanted to hear from individuals who were satisfied as well as those who were dissatisfied with the program. We checked with both union and management respondents to confirm that our sample did, in fact, represent a range of views and experiences with the program. We interviewed 6 to 13 CTs in each district, depending on the size of the program, for a total of 61 CTs across all sites. In the total study we conducted 155 interviews, using semi-structured interview protocols, tailored to the specific context of each district (see Appendix). We recorded and transcribed all interviews.

As a first step in data analysis, we wrote a thematic summary for each district, which allowed us to identify broad similarities and differences across the programs. Subsequently, we conducted detailed data analysis by coding documents and interview transcripts as well as writing analytic memos (Miles and Huberman, 1994). We wrote what we called “design briefs” about different aspects of the PAR programs and through that exercise investigated similarities and differences across programs. We compiled a detailed matrix comparing program characteristics across all seven districts.

There are several threats to validity in our study. First we studied only programs that had endured – the apparent successes. We have no information about the CT’s experience in programs that failed. Also, there may be selection bias in the sample of CTs, since most of those we spoke with were recommended by the program sponsors. Their views and experiences may not reflect those of the larger population of CTs.

## **The Application and Selection Process**

Teachers are typically wary of leadership roles that elevate one teacher above others. Colleagues ask what qualifies this particular teacher to be selected rather than another. Without clear answers to this question, teachers may resent a colleague's having a leadership role or resist her reform efforts. In each PAR program, the Panel's open application and rigorous selection process not only was said to yield skilled CTs, but also to lend legitimacy to their position.

Positions for CTs were advertised prominently in all districts by both the union and district. In Montgomery County, San Juan, and Syracuse, where the program was relatively new, the district sponsored information sessions where teachers could learn about the CT's role and responsibilities. Panels signaled publicly that selection for the role was based on merit by requiring applicants to demonstrate their strengths in multiple ways. Most districts required candidates to have had five years of teaching experience, while Rochester required seven. In addition, prospective CTs had to demonstrate that they worked well with both colleagues and supervisors by submitting references from administrators and teachers. As one Rochester CT explained, CTs needed to be "diplomatic and agreeable with people and know how to work with all sorts of personalities...to be effective" (RCSD CT 1). CTs also provided a writing sample or were required to respond to a writing prompt in a test-like situation so that the selection committee could judge their ability to write clear reports. Finally, selection committees interviewed each applicant and some also visited their classrooms unannounced to observe teachers in, what one CT called, "their natural environments" (MCPS CT 21).

CTs' accounts of the interview process were remarkably similar. Candidates were typically interviewed by five to nine people. The team of interviewers, which sometimes was the entire PAR Panel, included high-ranking members of the administration and the teachers

union This “huge cast of characters,” as one Cincinnati CT called them, contributed to the process feeling formal and intimidating (CPS CT 20). Those selecting CTs asked challenging questions about the district’s instructional standards, how applicants would work with underperforming teachers, how they would advise people whose teaching styles differed from their own, and whether they would be able to recommend firing a colleague. The interview was not only rigorous, but also acquainted candidates with the skills and high-stakes performance that would be required of them in making formal presentations to the Panel throughout the year.

In several districts, lead CTs or Panel members who were involved in the selection process conducted unannounced observations in the applicants’ classrooms. A Lead CT in Montgomery County said that observations ensured “quality control” (MCPS CT 21). One Syracuse Panel member said that, as a result of an observation, they decided not to hire someone who had interviewed well but whose classroom practice was “horrific.” From the CTs’ perspective, observations further raised the stakes of the selection process.

This demanding and competitive process was widely said to yield an elite group of educators, highly qualified for the role. Cincinnati, Montgomery County, and Minneapolis reported receiving approximately ten applications for each CT position. In San Juan and Toledo, there were approximately twice as many applicants as open positions. In Rochester, which employed close to 200 part-time CTs each year, approximately 4 out of 5 applicants were hired. About the same proportion were hired in Syracuse, which was in its second year of its program.

“They’re amazing,” said a Panel member in San Juan. A principal in Montgomery County echoed: “CTs are like superman, superwoman, who will come in. . . . They are the master teacher.” A Panel member in Syracuse called CTs “a very dedicated group of people, who

really love the profession” (SCSD Panel 12). The Executive Director of Human Resources in Minneapolis said simply, “They’re worth their weight in gold.”

### **Clearly specified procedures**

The CT’s’ responsibilities varied and the decisions they made carried high stakes for the teachers they worked with. Having their assignments set forth in clearly specified procedures made their actions far less controversial than they otherwise would have been.

#### *CT remained official peers*

Central to PAR programs is the fact that CTs are peers and are expected to remain so after they are no longer CTs. Most districts required or strongly recommended that CTs return to classroom teaching upon completing their term. CTs reported that their formal standing as a peer rather than an administrator helped them build trust with the teachers in their caseload. Program proponents were convinced that, when CTs returned to teach, the schools they joined—which might or might not be their original school—benefited from their recent experience. A CT in Toledo explained that the benefit was “to spread the growth, the professional growth, around as much as possible.”

#### *A clear referral process for experienced teachers*

Contracts stipulated a formal process for referring underperforming tenured teachers to Intervention, PAR’s most controversial component. These teachers were either referred directly by their principal or indirectly as the result of an unsatisfactory evaluation. Once a veteran teacher was referred to the program, most Panels assigned a CT to conduct an investigation, which included several prescribed steps—observing the teacher, assessing her performance on the district’s standards, and reporting back to the Panel, where the final decision about entry to

the program was made. District handbooks or teacher contracts described each of these steps and the administrator and union members of the PAR Panel ensured they were carried out fairly.

### *Having authority for final evaluations*

In some districts, the PAR policy called for the Panel to consider a CT's report as the sole, complete, and final evaluation of teachers in PAR. In Toledo, for example, CTs were granted the exclusive right to evaluate novices, while administrators were prohibited from conducting additional evaluations. In other districts, the Panel considered CTs' reports alongside administrators' evaluations. For example, in Cincinnati, administrators could submit letters for the Panel to consider along with the CTs' reports on the progress of both novices and veterans. In all districts, however, the CTs' assessments were the primary documents considered by the Panel as it weighed decisions about reappointment and dismissal.

### **Teaching Standards: The Foundation for Assessments**

Teaching has traditionally been viewed as a private matter carried out independently behind the closed classroom door. A norm of autonomy has led teachers to resist opening up their practice to the inspection and evaluation of peers. Within this context, teachers often question the right of a teacher leader to judge another's practice (Donaldson, et al. 2008; Neufeld and Roper, 2003). In districts implementing PAR, however, CTs observed colleagues' practice, suggested improvements, and formally assessed the quality of their teaching.

According to CTs, instructional standards played a central role in their ability to carry out their challenging and unconventional work of coaching and assessing peers. As a non-threatening, external definition of best practice, these standards justified their right to advise peers about how to become better teachers. CTs in six districts—all except Rochester where the

focus of the program was more on mentoring—spoke in strikingly similar ways about how their district’s teaching standards helped them address potential peer resistance.

*Widely accepted standards*

Standards went by different names—“criteria of evaluation” in Toledo, “performance indicators” in Syracuse, “performance standards” in Montgomery County, “standards of effective instruction” in Minneapolis—but these districts all used the standards as the accepted tool for assessing teaching performance. Some included them in PAR handbooks; others printed them directly in their contract. Across these districts, CTs consistently said the purpose of their PAR program was to help teachers meet those standards. For example, a CT in Montgomery County said:

We have professional growth standards that every teacher in this school system is held to. And there are six of them. . . . When a consulting teacher works with a teacher, that’s what they are basing their write-ups on. . . . [Y]ou are supporting teachers to get them to meet standard, so that, as you go through the years of having a PAR program, you hopefully have a group of teachers that are all meeting standard and are excelling at their craft. (MCPS CT 24)

As an assessment tool, standards were far more detailed and complex than the traditional checklists that districts had used prior to PAR. For example, Montgomery County adopted six standards, adapted from the National Board for Professional Teaching Standards. Each standard was subdivided into 4-10 “performance criteria,” which further described what the standard would look like in practice. Finally, like many of the districts, Montgomery County’s standards included a rubric that explained in detail what specific behaviors a teacher would demonstrate when meeting—or not meeting—each performance criterion linked to a standard. Within the rubric, some performance criteria had as many as thirty examples of the types of behaviors a teacher would need to perform to meet the criteria and thereby the standard.

### *Standards structured how to collect and report evidence*

Through multiple observations, CTs collected “evidence” or “data” documenting the ways in which a teacher did or did not meet each standard in her work with students. CTs would then present their findings in written and, in most cases, oral reports to the Panel. For example, in Montgomery County, when teachers were found to be below standard, CTs produced a growth plan which detailed not only the standard the teacher had still to work on, but also the types of data that CTs would use to determine whether the teacher had mastered the standard.

The process required CTs to have a deep understanding of the pedagogical rationale behind the standards so that they could identify relevant teacher behaviors in a variety of teaching contexts. For example, in order to assess whether a teacher was “committed to students and their learning,” a CT had to understand a variety of ways this commitment could be demonstrated; the district rubric helped with this. All seven districts required CTs to evaluate teachers’ progress on a given set of standards.

### *Standards facilitated providing feedback to teachers*

CTs in these districts frequently referred to the standards when describing their work as both coach and evaluator. They said the standards ensured that they made reliable and accurate assessments of teaching practice, allowing them to guide the teacher’s improvement and report accurately to the PAR Panel about the teacher’s progress. They also said that they used the standards to help them manage their relationships with peers, while performing tasks that were at odds with the norms to which teachers were accustomed.

CTs reported that the standards increased their confidence about the validity and reliability of their conclusions. One former CT in Minneapolis said that, without training to use

the standards, assessments would have been based “on maybe instinct, or your gut feeling, or your bias” (MN Union 9). A Syracuse CT also gained confidence from the standards: “It’s not just what I think is good teaching. It’s not just my judgment. It is based on those performance indicators. That’s what we’re looking for” (SCSD CT 13). Evidence might include the exact words that teachers used during class, assignments they gave, descriptions of how they interacted with students, numbers of students on-task, or student test scores. Evidence did not, however, include opinion or hearsay. A CT from Syracuse explained, “Your voice has to be silent [in the reports]. It’s factual, data-driven kinds of writing...” (SCSD CT 18).

A former CT said that, when he explained the coaching and evaluation process to teachers, he gave them a copy of the standards to demystify the process and diminish his personal role as evaluator. “So when I met with them and told them about the observations I would hand them a copy of the rule book and say, you know, ‘This is the tool I’m going to be using so this is what I’m looking for’ so it’s not a mystery” (MN Union 9).

Recommending that a teacher not be rehired took courage and confidence. Having the standards squarely in mind enabled CTs to make hard decisions. As a CT from Cincinnati explained:

The way that we were trained was that you were looking at a preponderance of evidence – not an anomaly that happens but a preponderance of evidence – and growth over time so that people are given some feedback –they have the opportunity to use that feedback and improve. And I think that that—if that is done properly, everybody should be okay. (CPS CT 20)

CTs said that providing evidence helped depersonalize critical feedback when they pointed out a teaching weakness or made a claim about a teacher’s performance in a report. Starting with evidence, and removing personal opinion, allowed the CT and teacher to look dispassionately at the data together. A former CT said, “I would sit next to the teacher and we’re

looking at this. So [it was] a ‘this is the bad news; I’m not the bad news’ kind of thing” (MN Union 9).

In this way, the standards served as a kind of “third party,” separate from the CT and teacher. The PAR Panel’s requirement that CTs justify all statements about practice with evidence from observations provided an accepted framework for CTs’ assessment and coaching of colleagues. They said their use of instructional standards ensured that their judgments were reliable and not arbitrary. Such standards, the CTs said, reassured both them and the teachers with whom they worked.

### **Learning a New Role**

The CT’s role differs markedly from that of the classroom teacher. In order to effectively coach and assess peers, CTs need to understand adult development and how individuals abandon previously-held beliefs and practices and adopt new ones. They need to know how to build trust with colleagues while maintaining high expectations, even for weak teachers who are trying hard to improve. They need to manage their time, a demanding caseload, and the necessary paperwork the program requires. One CT in Syracuse explained, “I didn’t know how to be a consultant teacher. I knew how – I know how to teach. I know what good teaching is, but how do I actually put that into practice and to help someone?” (SCSD CT 13). Another described the challenge she faced: “It’s a huge learning curve. I mean, people come to this position at the top of their game. [CTs are] the leaders at their schools and this is sort of a kick to the ego because you have to learn so much in this job, so you have to sort of not be the expert for a little while until you figure out your way” (MCPS CT 21). For most, there was no gradual transition to the role, no practice run with teachers whose careers did not count. From their first day on the job, beginning CTs were expected to carry out the same duties that more experienced CTs performed.

A CT in San Juan explained this feeling of disorientation. “[You’ve] never been in that position and all of a sudden, ‘Guess what? You have a caseload of 13.’ . . . How are you going to train in two weeks...?” (SJUSD CT 25).

CTs in Cincinnati, Toledo, Rochester, and Montgomery County received a week of training in the summer. Others were trained during the school year. A Syracuse CT’s account was typical:

Well I would say that it has been a remarkable professional development experience. I mean I have learned so much, I cannot even believe it.... Like how to work together in a group, how to be a better writer, how to be a better communicator, about the performance indicators [standards], learned more about instructional strategies.... I feel like I am a better leader, I feel like I am you know, more empathetic when I am in my relationships. I mean it is just never-ending. (SCSD, CT 15)

#### *Learning to implement standards-based evaluation*

Beginning CTs often lacked a deep understanding of the standards and how to use them as a coaching tool. A CT in Toledo said that, until the training, she’d never taken the time to “really look at the teaching standards.” A CT from Syracuse admitted to not knowing the standards at all before becoming a CT. In order for CTs to make fair, consistent assessments about teachers’ progress, they needed to know them well, and be sure that their understanding matched that of their peers so they would be consistent in their evaluations.

Minneapolis, Cincinnati, Syracuse, and Montgomery County devoted considerable time in pre-service and in-service training for CTs to learn about the standards. To establish reliability in their ratings, CTs jointly observed instruction either through videotape or in actual classrooms. A CT in Cincinnati, where this process was unusually well-developed, described her initial training in the standards:

We went and did a mock observation on a teacher at the beginning of the school year. And we all scripted it out. And then we compared notes to kind of calibrate. “This is

what I saw.” “Oh, I didn’t see that.” ... Over time, the more you do it, the better you get at it, the more you see. Now when I go in I know what to look for. (CPS CT 18)

At these sessions, CTs would examine a specific piece of evidence and decide together whether or not it was sufficient to demonstrate a particular standard. Through this process, which one called “calibration training,” CTs came to a common understanding of what to expect from teachers for each of the standards. They reviewed examples of previous reports to understand how the standards were incorporated into evaluations. As this CT in Syracuse reported, many CTs found it “really valuable” to read exemplars and learn “what made a good evaluation, a good written evaluation” (SCSD CT 14).

#### *Learning to coach adults*

CTs learned strategies for coaching adults, a process that they described as complex and very different from their work with students. For example, a CT in Toledo explained that during her training she learned about “the phases of adult learning” and discussed “what phases we’ll see our interns go through as we’re working...with them” (TPS CT 16). A Syracuse CT said, “What I learned so much about is how to establish a rapport with people when you’re trying to get them to trust you and how to use that rapport to help them find their own path” (SCSD CT 17).

CTs appreciated learning techniques that fostered teachers’ reflection. Most districts provided training in the Cognitive Coaching method, which required the participating teachers to construct their own model of effective instruction. CTs learned to refer to student work and verbatim student quotes from a lesson to help a teacher assess whether or not she had met the learning goals. Furthermore, CTs learned to listen to a teacher’s description of what happened in a lesson and to respond with questions or observations that would prompt meaningful reflection. A CT in Syracuse described the method and its value:

It teaches you how to listen and it teaches you how to ask those questions, and it also teaches you how to direct conversations so that you – you have your planning conversation, your reflection conversations, and your problem solving conversations.... We want them to become self-reflective and to come up with those answers themselves so that's what cognitive coaching does. It gives you a tool to do that, and it's really, really good. (SCSD CT 13)

### *Learning about the logistics*

CTs also reported receiving training in how to organize their time and approach the logistics of their new responsibilities. A CT from Montgomery County contrasted work in her new role with her work as a teacher:

We're used to bells telling us when to move and we go to the next place. And the bell rings and we go to the next place. We know where we have to be every single morning. We have to check our name off on the sheet as we come in. And all of a sudden instead of that, what you've got is a car, a laptop, cell phone and a list of 15 or 16 teachers spread all over the county and you've got to figure out how to make sure you get there and that you differentiate it so that you give more when they are in trouble and a little less when they are needing some space and all that. So we talk a lot about that, how to schedule and how to manage your time and responsibilities that go with that. (MCPS CT 22)

### *Preparing for Panel presentations*

In districts where CTs regularly reported to the PAR Panel<sup>1</sup>, they practiced their presentations with colleagues. Montgomery County CTs did this individually with the district's Lead CTs, with their peers, and with their designated "PAR Pair" of teacher and administrator Panel members, who also gave feedback. In Toledo and San Juan, CTs organized practice sessions among themselves and took turns playing the role of Panel members who asked follow-up questions as part of a "mock Panel."

### *Informal support from colleagues*

CTs said they also received informal professional advice. In the six districts where CTs were all full-time and district-based, they had a shared office, where they wrote reports and held

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<sup>1</sup> All districts except Rochester. In Minneapolis, CTs presented before school-based teams of administrators and teachers, which functioned in many ways like the PAR Panel in other districts.

meetings. A CT from Toledo described the value of this informal support: “You’re constantly talking to someone and. . . asking advice, too. ‘How else can I help this person?’ ... ‘Am I doing the right thing?’ ‘Am I seeing this?’ ‘Read this report and, you know, what do you think?’ . . . So, just getting that support from the other consultants helps” (TPS CT 16).

This peer-to-peer interaction helped them learn to do their job better. As a teacher in San Juan said, “talking with other [CTs] is what sometimes makes us grow the most” (SJUSD CT 19). Another San Juan CT emphasized the importance of her peers: “There is no way I could do this in isolation.... The support is wonderful” (SJUSD CT 18).

Thus, CTs received both formal and informal training as they quickly assumed responsibility for tasks they had never done before and which they knew some of their peers might challenge. In most districts where CTs worked across the district with no school base, colleagues provided much needed advice, support, and encouragement.

### **The Panel’s Review Process**

Even with the training they received, CTs found their jobs very challenging. For many, the hardest part was reporting on teachers who failed to meet the district’s standards because they recognized that an observation report could lead to a teacher’s dismissal. A CT in San Juan captured the sense of personal responsibility that CTs in all districts said they felt acutely: “You’ve got somebody’s career in the palm of your hand” (SJUSD CT 24).

There is considerable evidence that in most districts teacher evaluation is intermittent and formal dismissals are rare (Toch & Rothman, 2008). However, CTs were obliged to review and report to the PAR Panel on every teacher in their caseload. They knew the final report would affect the teacher’s livelihood. They felt pressure from peers outside PAR and they reported

feeling a sense of personal failure when a teacher did not succeed. CTs said that the direct supervision by the PAR Panel often gave them the resolve to carry out their responsibilities.

*PAR Panel held CTs accountable for their work*

CTs in all districts said the PAR Panel established high standards for their job performance by requiring CTs to report on teachers' progress regularly through written and, in most cases, in-person presentations. Written reports, which CTs submitted to the Panel, included at a minimum: narrative description of the teacher's practice; specific examples of how the teacher did or did not meet standards; and a summary statement about the teacher's performance, which specified whether or not the teacher met standards. Some also had to include an accounting of the observations and conferences the CT had conducted with the teacher. In most districts, CTs presented their cases in front of the PAR Panel once or twice a year. In some cases, those present at the meetings included the principals and teachers with whom they worked. At these meetings, Panel members questioned the CTs closely about their work with the teacher, including how well the CT knew the teacher's practice and how they had decided whether the teacher met standards.

CTs said that the formal nature of Panel presentations, the detailed questioning by the Panel, and the feeling that their work was valued set high expectations, which they wanted to meet. A CT bluntly described the effect of this audience on her reports, "Nine people are going to be reading this, so you want to make sure that it's done well. You don't want to come across as an idiot" (SCSD CT 13).

In some districts where CTs presented in person, the Panel asked follow-up questions. For example, a CT in Toledo explained that if she or one of her peers claimed that a struggling teacher had improved, Panel members would "zero in" and "want more proof" of progress (TPS

CT 22). A CT from Montgomery County described typical questions Panel members would ask following his presentation about a teacher who was not meeting standards:

And then they begin asking questions. ‘So what have you done to help them? Have you video-taped them? Have you taken them on a peer visit to another—to see a master teacher? What resources have you given them? Have you helped them plan if they are having difficulty? What’s the structure in the school like? Do they have a team leader who’s working with them on a weekly basis? Is their staff development teacher helping them?’ ... So you want to make sure you’ve got all your ducks in a row. . . having anticipated all those questions. (MCPS CT 24)

One CT explained why she felt the Panel’s close questioning was helpful, “You know, it held you accountable, I mean, and as it should because. . . [it’s] somebody’s career and people’s lives and careers that you’re reporting on. . . . I felt that they questioned when they needed to question” (TPS CT 22).

CTs reported that this sense of accountability to the Panel directly affected their day-to-day work. When they were not sure what steps to take with teachers in their caseload, they said they would anticipate the Panel’s questions, which helped them carry out work even when it felt difficult. A CT in Toledo said:

And I think that you keep your eye on the Intern Board of Review [PAR Panel] the entire time you’re working with your teachers, because you know what they’re going to ask, you know what’s expected of you, and it’s like - it’s like the finish line. You know, I have to make sure that I can stand up there and do my job. And so it drives me. (TPS CT 15)

Another CT explained that the Panel especially helped her work with teachers who were not meeting standards. She explained that, rather than easing off in those situations, she became more intensely involved and provided more frequent guidance to the teacher. She said, “I need to see improvement because when I report to the PAR Panel, they’re going to be asking me specific questions and I have to be able to answer those questions” (SCSD CT 13). Therefore, in all their work, CTs knew that they would have to justify their choices to Panel members who

held them to high standards. This sense of accountability, they said, helped them carry out the difficult aspects of their work.

### **Conclusion and Implications**

Teachers in the CT role coached and assessed their peers—responsibilities that typically would be expected to provoke resistance and resentment among teachers. In these districts, however, CTs said they were able to carry out their work effectively and feel a sense of accomplishment. Across the districts, CTs described similar elements of PAR that gave legitimacy to their role and helped them be effective, despite traditional teaching norms which might be expected to interfere with their work.

By including the PAR Program and the CT's role in the teachers contract and/or school board policy, teacher unions and school district administrators granted legitimacy to their work. In each district the union's strong advocacy of PAR increased the prospect of wide support by teachers. All programs had a rigorous application and selection process, which not only enabled districts to hire excellent CTs, but also increased confidence among teachers and administrators that CTs were worthy of the responsibility that PAR assigned them. District contracts and related PAR program handbooks explicitly set forth the program's procedures and CTs' responsibilities. Thus, CTs did not have to negotiate the basic terms of their work with individual teachers.

In assessing teachers' performance, CTs could rely on the district's well-developed and widely endorsed instructional standards. Because their judgments were based on these standards, CTs said they were generally not subject to accusations of bias or challenges about their judgments. As they worked to help teachers meet those standards, CTs relied on in-depth training and ongoing support. Finally, they reported working within a system of professional accountability that was overseen by a joint PAR Panel of teachers and administrators. Because

the Panel selected and supervised CTs, these leaders implicitly endorsed their qualifications and practice, thus further increasing the legitimacy of the CT's role.

*Implications for policy, practice, and research*

Research on teacher leadership suggests that it is very hard to make these roles work well. Traditional norms among teachers have produced an organizational culture in which teachers resist intervention by peers. That culture of isolation favors individual teachers' autonomy over their interdependence. This study of the CT's role suggests certain practices that may be helpful to those designing roles for instructional coaches, both within a PAR program and for other teacher leaders.

Establish an open, transparent and rigorous selection process: When creating teacher leadership positions, it is important to be strategic about how the hiring process establishes the legitimacy of the role. Specifying clear qualifications and performance expectations for applicants and then assessing them in a rigorous, even-handed application process signals to peers that selection will be based on merit rather than on favoritism. Including multiple constituencies in the hiring process reassures district educators that these performance expectations will be met. In particular, including the teachers union may increase the likelihood that teachers will accept those selected for the leadership roles. Moreover, it may increase teacher leaders' own sense of legitimacy as well as their legitimacy in the eyes of others.

Build a system of professional accountability: The CT's role, like many new teacher leadership roles, requires a set of skills that are different from those of a classroom teacher. Expecting that master teachers will be expert at guiding their colleagues to change their instruction is unrealistic and will most likely result in frustrated teacher leaders and ineffectual reforms. To make change that will last, districts must invest in developing new skills among

these leaders. Districts need to train instructional coaches in both the content of the reform work, such as new teaching standards and methods, and the process of successfully working with adult learners.

As this study demonstrated, teacher leaders also must be held accountable for performing what is often challenging work, particularly when carrying out tasks that run counter to the norms of teaching. Knowing that their work will be reviewed by a respected panel of peers and district leaders further motivates teachers to hold themselves accountable to a new norm of opening up practice for peer review.

Provide clear performance standards within a comprehensive reform effort: A set of jointly agreed-upon instructional standards becomes the linchpin of a system of improvement. These standards provide clear performance goals, the rationale for review, and thus the justification for a teacher leader's intervention in the instruction of colleagues. However, standards alone will not ensure that a teacher leader can be successful at improving her colleagues' work. Instructional coaches will experience increased authority to carry out their work when that work is part of a larger, coherent system of improvement. Is there a commonly-held definition of effective practice? Has the union endorsed it? In what ways does the district provide support for teachers to meet this performance expectation and what structures are in place for continually assessing teachers' performance and intervening when it does not meet standards? How is the reform effort that is carried out by teacher leaders integrated into the reform agenda of the whole system? Without such a coherent set of supports for the teacher leader's work, efforts to improve will remain isolated.

It is clear that designing and implementing teacher leadership roles is not simple or obvious work. In the context of the traditional flat teaching career, a role that grants increased

status to individual teachers threatens long-held conventions and, thus, requires deliberate design and support to be effective. As districts introduce increasing numbers of leadership positions such as the CT's role in PAR, they will need to consider how to provide legitimacy for the role as well as the right combination of support and accountability, which will allow teachers to lead improvement successfully. In this way teacher leaders will provide the support their colleagues need to raise the achievement of all students.

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## APPENDIX A: Interview Protocols

### **Interview Protocol for Superintendent and Union President**

1. Please tell me briefly how long you've worked in education and in the district.
  - What roles have you had?
  - When did you first become involved with the PAR program?
  - Have you been active in your union?
2. We want to understand how PAR relates to the broader relationship between labor and management here. Does PAR stand out as typical or unusual, given that relationship?
3. We're interested in how PAR came to be in this district:
  - How was PAR negotiated?
  - Who were the proponents and opponents?
  - Did you have difficulty convincing the superintendent?
  - Your members? (which ones)
  - Principals?
  - Are there unique features of the district's PAR program?
4. How do you choose the members of the PAR panel? Is there a labor-management split?
5. What are the effects of PAR on the principal's role? What issues does PAR raise for them?
6. What have been the biggest challenges?
7. Have there been any significant changes in the past two years?
8. What do you think are the costs and benefits of PAR?
9. What do you see as the future of PAR in Cincinnati?
10. If another superintendent/union president asked you for advice about PAR, what would you say?

## **Interview Protocol for Union Officials and District Administrators**

### **Personal Background**

1. Please tell me briefly how long you've worked in education and in Cincinnati.
  - What roles have you had?
  - When did you first become involved with the PAR program?
  - Have you been active in your union?

### **PAR Background/History/Purpose**

2. Can you tell me about how and why PAR was introduced in your district?
  - Who proposed this program? Why?
  - Who were the proponents? Were there opponents? Why did it pass?
  - Were people familiar with similar programs in other districts?
3. What are the goals for these programs? Do you think those goals are being achieved?
4. We are interested in whether the program has changed over time. Have there been any important changes in the way the program is administered or in the program goals since it began?
5. Who are the key union leaders or district administrators involved in PAR?
  - Do they work together or separately?
  - Is there a point person for each side?
  - Does each side work independently to make this work, or is there constant collaboration between the union and the administration?

### **Labor-management Relations and Program Governance**

6. Most people who don't know about these types of programs are surprised by the extent of labor-management collaboration that these programs require. Can you describe the nature of the labor-management relationship in the district? Has it changed over time?

#### **IF ON THE PAR PANEL:**

7. (Ask the first few Panel members that we interview this question, but not everyone.) Can you briefly describe how the Panel meetings work?
  - Do all interns get presented at each meeting?
  - What kinds of questions are asked by panel members?
  - How do decisions get made (voting)?
  - How often are CT recommendations overturned?
  - Who attends meetings (principals attend? their role?)

#### **ASK THIS QUESTION OF KEY PEOPLE, NOT EVERYONE**

8. On average, how many dismissals does the panel recommend each year (Apprentice and Veteran)?

IF NOT ON PAR PANEL

9. What do you think of the Panel and how it works?

**View of CTs**

10. Do you think you are getting the best teachers to be CTs?

11. I'd like to know your views of CTs and the work that they do.

- Do you feel that they give the Interns and Intervention cases adequate support?
- Do you feel confident in CT recommendations?
- Are those views shared by others?

IF ON PAR PANEL

12. What more, if any, support do you think CTs need?

13. We understand the CT term limit is 3 years. Do any CTs serve for longer?

What is the typical career path of a CT – i.e. do they tend to work as CT for a while and then return to full-time teaching?

IF UNION OFFICIAL:

14. What do your members think about teachers evaluating other teachers and sometimes recommending dismissal?

**Program Evaluation**

15. Do you think the PAR program is successful? Do others see it the same way or differently?

16. What do you see as the costs and benefits of the program? On balance, do you think it is worthwhile?

17. We know that the program has been evaluated. What have you learned from that process? Is there any evidence of improved teacher quality?

18. Are there additional challenges or benefits that the district has encountered in implementing and sustaining PAR?

**Going forward**

19. What do you see as the future of PAR in Cincinnati?

## **Interview Protocol for Panel Members**

### **Personal Background**

1. Please tell me briefly how long you've worked in education and in this district.
  - What roles have you had?
  - When did you first become involved with the PAR program?
  - Have you been active in your union?

### **PAR Background/History/Purpose**

2. [If applicable.] Can you tell me about how and why PAR was introduced in your district?
  - Who proposed this program? Why?
  - Who were the proponents? Were there opponents? Why did it pass?
  - Were people familiar with similar programs in other districts?
3. What conditions have enabled PAR to last in the district?
  - What groups have opposed these programs? Supported them?
  - Have there been any substantial challenges to them?
  - How are they funded?
4. We are interested in whether these programs change over time. Have there been any important changes in the way the program is administered or in the program goals since it began?

### **Panel and Responsibilities**

5. How are members chosen? How long are members' terms?

### *CT Selection/Training/Support*

We are particularly interested in understanding the role of the Panel in employment decisions. Before we get into that, we want to ask you about some other areas of the Panel's responsibility.

6. How often does the Panel meet and for what purposes?
7. Selection of CTs
  - What is the process?
  - Who applies? Is this a strong pool? How do you know?
  - What criteria do you use for selection?
  - How do you decide which ones to take?
8. Training of CTs
  - How are the CTs trained?
  - Is there on-going training?
  - Who is responsible for this?

9. Supervise/Support CTs
  - How do you know if CTs are doing their job?
  - How do you evaluate them? What is entailed in the CT evaluation form?
  - What makes CTs effective in their work?
10. Can you talk about how the Pair process works?
11. Does the Panel review and make changes in the program?
12. What role, if any, does the Panel take in helping CTs navigate their relationships with building principals?

*Teacher Evaluation/Employment Decisions*

13. Walk me through a typical Panel teacher evaluation meeting:
  - Who attends?
  - How many cases do you hear at a time?
  - Who presents the case? What kind of information do they present? Who makes recommendations?
  - Are there deliberations? What kind of discussions do you have?
  - What options does the Panel have in deciding a case?
  - Does the Panel vote? What vote is required for action?
  - How often does the Panel overturn the recommendations?
  - How often do Panel recommendations get overturned? By whom?
  - How does this process work for veteran teachers?
14. The Panel is deliberately composed of both union and administrative representatives. This might suggest that the groups have different, possibly conflicting, priorities. Does the panel have split decisions along party lines (4-4 votes)? How do you handle them?
15. What is the next step if the Panel decides not to renew a teacher?
  - Who tells the teacher? Are they counseled out (before or after non-renewal vote)?
  - Have you had to have these conversations? Can you give me an example?
16. How many Intern teachers are dismissed through the program each year? How many veterans? Are these all formal actions or did some people choose to leave before that happened?
17. [If not covered yet] As a Panel member, do you have any special responsibilities?
18. [If not covered yet] How do the roles of Program Facilitator and Co-Facilitator work?

**Views of Other Constituents**

19. How do others in the district (teachers, principals, district administrators, school board members) view PAR? Does the Panel solicit these views?

**Program Success/Evaluation**

20. Do you think the PAR program is successful? Do others see it the same way or differently?
21. What do you see as the costs and benefits of the program? On balance, do you think the program is worthwhile?
22. We know that the program has been evaluated. What have you learned from that process?
23. Do you have any recommendations for improving the program or the work of the Panel?

## **Interview Protocol for Consulting Teachers**

### **Personal Background**

1. Please tell me briefly how long you've worked in education and in this district.
  - What roles have you had?
  - When did you first become involved with the PAR program?
  - Have you been active in your union?

### **Selection/Initial Training**

2. I'm interested in knowing more about how the CT selection process works here. Could you describe the process that you went through as an applicant?
3. Do you have a sense for how the position of CT is viewed by your peers (other teachers)?
4. Do a lot of people apply? [try to get a sense of the strength of the pool]
5. What initial training was provided for you as a CT?
  - Did you learn things there that you find useful as a CT?
  - Are there topics that the training didn't cover, but should?

### **What do CTs do and where did they learn to do it?**

I'm interested in understanding in more detail what your job entails and what you do day to day throughout the year.

6. Could you describe your case load? (number of teachers; matched by grade and subject) Is yours a typical case load?
7. Could you choose a typical novice teacher and describe how you work with him/her throughout the year? [Explore program requirements vs. choice]
8. What might you do differently with someone whose work concerns you? [Explore the balance of coaching and evaluation.]
9. How does this process work in your support and review of veteran teachers?
10. How did you learn how to do these things?
11. As you do your job, how do you decide what good teaching is? How do you use the standards and rubrics? Example?
12. Could you describe the process that you use when you make recommendations about a teacher's reemployment?
13. How do you decide what is "good enough"? Do you factor in a teacher's improvement or promise?

14. Your job is to support and evaluate new and experienced teachers.
  - What role, if any, do principals have in first year evaluation?
  - How does the process work for veteran teachers?
  
15. Can you describe how you work with principals day-to-day throughout the year? [It might be useful to pick a typical principal/intern and walk me through your interactions throughout the year.]  
[Probe how this differs for more “challenging” principals.]
  
16. Do you and the principal ever disagree?
  
17. I’m interested in understanding the kind of support and assistance that is available to you as you do this work with teachers. When you have questions or need help, who do you go to?
  
18. Do you work closely with other CTs?

**PAR Panel**

19. I’m interested in your experience with the Panel. Could you describe what you do at Panel meetings and what that experience is like? (NOTE: Once we understand how the meetings work in any district we only need to ask the second part of this.)

**CT Role/Teaching Career**

20. What do you find most challenging about your work?
  
21. What are the benefits and drawbacks, to you personally, of being a CT?
  
22. Could you tell me what you plan to do when you complete your term as a CT?  
...and ten years from now?

## **Interview Protocol for Principals**

### **Personal Background**

1. Please tell me briefly how long you've worked in education and in this district.
  - What roles have you had?
  - When did you first become involved with the PAR program?
  - Have you been active in your union?

### **PAR Background/History/Purpose**

2. How does the PAR program fit into what you hope to accomplish within your own school?
3. I'm interested in knowing more about the role of PAR in this district.
  - What do you see as the current goals for this program?
  - Do you think they are being achieved?

### **Experience with PAR**

4. I'm interested in learning more about how PAR works in your school. Please describe how the program works. [novice and veteran programs]
5. Have you ever referred teachers for Intervention?
6. How do you as a principal identify an underperforming teacher?
  - What would be some warning signs that a teacher was in need of a performance review?
  - Do you look at test scores?
  - [Can you give me an example of an underperforming teacher who you – or the CT – identified as underperforming? How does that teacher get into Intervention?]
7. Could you describe how you work day to day and over the course of the year with the CTs?
8. What do you think of the CTs and the work that they do?
  - Candidate pool?
  - Selection process?
  - Subject/grade match?

### **IF NOT COVERED ABOVE:**

9. Do you feel confident about the support the CTs give to apprentice teachers and their recommendations about reemployment? [Also for other veteran teachers and intervention cases]
10. Have you ever disagreed with a recommendation? Have you ever disputed a CT's recommendation?
11. What do you think makes the CTs more or less effective in their role?

12. How do teachers in your school view PAR? [novice and veteran programs]
13. Has a teacher you worked with ever been dismissed? Without getting into the details, could you give me a sense of what the concern was about? [novice and veteran]
14. From the time a teacher is identified as needing assistance, what's the quickest time until a resolution of the case? What's the longest? In your experience, what has the typical timeline been?

### **How PAR Affects Role of Principal**

15. I understand that PAR and the work of a CT may affect the work of a principal quite a bit. We understand that the principal's role in evaluation is limited in the first year but that the principal takes over responsibility in the second year. Can you tell me about that?
16. How would you describe who is responsible for evaluation in this district?
17. How does this process work for veteran teachers?
18. How does this affect what you can / cannot do as a principal?
19. How do you think about your accountability and PAR? You are accountable for the results at your school, but CTs are making recommendations about employment. How do you feel about this?
20. In cases where the review plan works and teachers "get better," what does "get better" mean? What does it look like? Please give us an example of how you knew when a teacher improved.

### **Perspectives on PAR Overall**

21. Are your views of the PAR typical of other principals in the district? Have views changed over time?
22. Overall, do you think the program is successful? Do you have recommendations for improving it?
23. We know that principals inevitably face challenges and constraints in these types of programs – what do you (or your peers) see as some of the biggest concerns?
24. What do you see the district doing that helps principals understand how to participate in PAR?