**Instructional Coaches as Teacher Leaders: Roles, Challenges, and Facilitative Factors**

by

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Abstract

Teacher leaders represent change agents within a school and they have formal and informal roles to improve teaching and learning.  This study focuses on one of the formal roles of teacher leadership which is instructional coaching.  There is a thin body of research which focuses on instructional coaching; therefore, this study will contribute to an emerging body of literature.  The central question of the study was: How are the roles of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches?

The researcher utilized a multiple-case study approach to capture the essence of the roles instructional coaches play in rural and urban elementary and middle schools in Alabama. Principals, instructional coaches, and teachers were interviewed in their school setting to afford the researcher an opportunity to gain an in-depth understanding of their perspectives.

The researcher analyzed similarities and differences within and across the three cases. All of the participants perceived the roles of the instructional coach as someone who provides support, professional development, and analysis of student data.  The participants perceived the most important facilitative factor for instructional coaches as having support from the principal. However, they stated that instructional coaches did not have adequate time to complete their daily responsibilities, due to the demands of coaching.  Instructional coaches were faced with teacher resistance, and role ambiguity hindered their success. The findings from this study confirmed what the literature states about the roles, challenges, and facilitative factors of instructional coaching.

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# CHAPTER 1. INTRODUCTION

An instructional coach in a K–12 school is one who provides professional development on-site to teachers, and utilizes a variety of research-based instructional practices by conducting one-on-one meetings, planning collaboratively with teachers, modeling instructional strategies, co-teaching, observing and providing teachers with feedback (Knight, 2007). Researchers have composed various role descriptions of an instructional coach; however, researchers have failed to agree upon a universally accepted description. The International Reading Association [IRA], one such organization that provides support to individuals and organizations globally, describes instructional coaches as those who provide developmental training, resources and other necessary support in order to help teachers improve instructional practices (IRA, 2004).

Researchers have revealed that principals spend about 70% of their day with issues associated with buses, budgets, and behavior and the other 30% on instructional issues that affect student achievement (Louis, Leithwood, Wahlstrom & Anderson, 2010). Principals must distribute leadership responsibilities to teacher leaders to improve student achievement (Harris & Killion, 2007). Teacher leaders' roles are both formal and informal and their responsibilities vary (Danielson, 2007). Killion and Harrison (2007) researched different roles teacher leaders serve within their respective schools and across school districts. Teacher leaders are involved in a wide spectrum of roles that include curriculum specialists, professional developers, mentors, data coaches, and learning facilitators.

The phrase 'teacher leader' emerged approximately five decades ago. There are varieties of definitions that describe teacher leadership; however, they all share a common element, which is to improve student achievement, whether they are working directly or indirectly with students. They also represent change agents within a school or school district. Based upon findings from Katzenmeyer and Moller (2009), the position of teacher leader emerged as a result of school districts recognizing how training teachers via professional development did not change their instructional practices, unless they were afforded the appropriate follow-up in the form of coaching. In order for teachers to emerge as leaders, they must first master their ability to successfully teach students. Teacher leaders also must develop a firm foundation of teaching experience and expertise. Teachers who are leaders expand their influence by nurturing growth in others and demonstrating the following behaviors:

- building trusting relationships (Donahoo & Hunter, 2007)

- providing feedback that will motivate others

- dealing with resistant colleagues (Johnson & Donaldson, 2007)

- delegating responsibilities to others

- exhibiting characteristics of continuous learners

- mentoring, coaching or counseling peers (Katzenmeyer & Moller, 2009, p. 58).

**History of Instructional Coaching**

As a result of the No Child Left Behind Act, the Reading First Program was established in order to help improve reading instruction and student performance in grades kindergarten through third grade. The goal of this program was to ensure that every student could read at or above grade level by third grade (U.S. Department of Education, 2004). Another goal of the Reading First initiative was to provide teachers with professional development and include the

use of literacy coaches as one of the major components (Denton, 2003; Deussen, Coskie, Robinson, & Autio, 2007).  A coach is described as someone who provides daily support both formally and informally (Dole, 2004).  Coaches were originally utilized to help teachers improve their instructional practice in reading.  This was the most problematic area for elementary students in high poverty schools.

According to Denton (2003), schools that required improvement were identified and awarded funds to improve reading performance under the Reading First Initiative.  However, in order to meet the guidelines for eligibility, school districts had to meet the following criteria:

- have the highest percentage of students reading below grade level in that particular state;
- either the U.S. Department of Housing (in urban areas) or Department of Agriculture (in rural areas) must include an Empowerment Zone or Enterprise Community;
- acquire a substantial amount of Title I schools or obtain the greatest percentages of Title I students in the state.

Teachers must be willing to provide explicit instruction in five critical areas that were identified as the premise for the Reading First initiative and involves the following: phonemic awareness, phonic word recognition, reading fluency, vocabulary development, and reading comprehension (Denton, 2003).

Teacher leaders have taken on more formal roles that include reading coach and reading specialist.  A new specialized teacher role has emerged which is that of an instructional coach, as a result of, the increased demands for student achievement in schools.  An instructional coach is one who utilizes effective teaching methodologies and provides on-site professional development training to address the needs of teachers (Denton & Hasbrouck, 2009; Knight, 2005).  According

to Knight (2007), instructional coaches utilize various methods to improve instruction that include the following: modeling instructional practices, leading meetings with teachers, and providing teachers with feedback.  As a result of the vast responsibilities placed upon educators, it is important to define those roles and responsibilities, which are specific to instructional coaching.  Professional responsibilities, such as recess duty and morning and afternoon supervision, are responsibilities assigned to most educators; however, those components specific to the achievement of goals set for an instructional coach must be specifically communicated and monitored.  The perceived benefits and challenges of an instructional coach's leadership role is often contingent upon the school or school system's locale.  Challenges that are commonplace in rural communities may be non-existent in urban areas.  Consequently, differences, such as socio-economic status and the level of parental involvement are factors that teacher leaders must consider.

## Purpose of the Study

The purpose of this study was to determine the role of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches.  The researcher conducted in-depth interviews to determine the challenges, and facilitating factors of the roles instructional coaches play in elementary and middle schools.  The participants who were interviewed for this study were principals, instructional coaches, and teachers.  The administrators and teachers were selected because they work directly with the instructional coaches and could describe their perspectives on the role of instructional coaches.  The participants in the study worked in school systems in the southeastern part of the United States, including rural, and urban elementary and middle schools.

**Research Question**

The central research question for the study was: How are the roles of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches?

**Sub Questions**

    1) How do principals perceive the roles of instructional coaches?

    2) How do instructional coaches perceive their roles?

    3) How do teachers perceive the roles of instructional coaches?

    4) What facilitative factors enhance the success of instructional coaches?

    5) What are the challenges which impede the success of instructional coaches?

**Significance of the Study**

There is a thin body of research that focuses on instructional coaching; therefore, this study will contribute to an emerging body of literature. The findings of this research can benefit leaders in various ways. This study can help principals and curriculum directors make informed decisions when seeking to hire instructional coaches. It is important to clarify the role of instructional coaches so they will have a clear understanding of what is expected of them (Heineke & Polnick, 2013; Knight, 2007; Wren, 2005). This study can also educate administrators and curriculum directors on what skills and support instructional coaches must acquire prior to training others. Although the roles and responsibilities of coaches vary, most coaches work directly with the school principal to determine what support teachers need. However, in other cases, the instructional coaches work closely with the curriculum director who is responsible for providing professional development to strengthen the skills and dispositions of the coaches. Instructional coaches are tasked with assisting and modeling research based instructional practices for teachers. This study can also help administrators become cognizant of

the importance of choosing the appropriate professional development for both teachers and instructional coaches. Instructional coaches work collaboratively with administrators to improve instructional practices and increase student achievement. Additionally, the state department of education, local educational agencies (LEAs) and instructional coaches may benefit from the findings of this study. It also adds to the small body of research on instructional coaching and it may stimulate additional research on this topic.

Teacher leadership is the conceptual framework that serves as the foundation for this study. One formal roles of teacher leadership is instructional coaching which serves as the focus of this study.

## Limitations

There were several factors that resulted in this study being delimited. First, the researcher only interviewed participants who worked in one southeastern state in the United States and only in public school systems. Another factor was that the sample was not random but purposeful. This study was limited to districts with administrators, teachers, and instructional coaches from two school districts who served rural and urban elementary and middle schools.

## Definition of Key Terms

The following definitions are utilized to clarify specific terms within the study.

**Instructional Coach –** One who provides professional development on-site to teachers, and utilizes a variety of research-based instructional practices by conducting one-on-one meetings, planning collaboratively with teachers, and modeling instructional strategies, co-teaching, observing and providing teachers with feedback (Knight, 2007).

**International Reading Association** – A nonprofit organization that supports individual and global organizations that are committed to improving literacy (IRA, 2004).

**National Center for Educational Statistics (NCES)** worked with the Census Bureau to create a new locale classification system and revised its definitions of school locale types (41-Rural Fridge, 42-Rural Distant, and 43-Rural Remote). Rural and urban school districts are defined as the following:

**Rural Schools** – These schools serve communities of 2,500 or fewer population.

**Fringe rural.** The census-defined rural territory that is less than or equal to 5 miles from an urbanized area, as well as rural territory that is less than or equal to 2.5 miles from an urban cluster.

**Distant rural.** Defined as rural territory that is more than 5 miles but less than, equal to 25 miles from an urbanized area, as well as rural territory that are more than 2.5 miles but less than, or equal to 10 miles from an urban cluster.

**Remote rural.** Is defined by the Census Bureau as rural territory that is more than 25 miles from an urbanized area and is also more than 10 miles from an urban cluster (National Center for Educational Statistics [CSTP], 2006).

**Urban Schools** – These schools serve communities of at least 2,500 or more population.

**Urbanized Areas (UAs).** It consists of 50,000 or more people with a core population density of at least 1,000 people per square and adjoining territory with at least 500 people per square mile.

**Urban Clusters (UCs).** It consists of places with a population between 2,500 and 50,000 people.

**No Child Left Behind (NCLB)** – A school reform mandate of 2002 that was designed to improve student achievement for all students. Each state is held accountable for ensuring that students in school districts are making adequate yearly progress. The mandate also emphases the importance of closing the achievement gap in reading. According to NCLB mandate of 2002, all children should be able to read by third grade (United States Department of Education, 2003).

**Professional Development** – A process that may occur formally or informally to improve teaching and learning. The formal process includes: a conference, seminar, and workshop; however, it could also include professionals learning together as a team. Professional development can also be conducted informally with colleagues observing the work of others, conducting research, and through independent reading. Other names for professional development are: staff development, in-service, training, and professional learning (Mizell, 2010).

**Reading First Initiative** – The program was created as a result of the NCLB Act of 2002. It encouraged states to utilize scientifically based research as a foundation of the K–3 reading instruction. The goal of this program was to ensure that every student could read at or above grade level by third grade (U.S. Department of Education, 2004).

**Scientifically Research-Based** – A rigorous and systematic process that is conducted in order to receive knowledge about educational activities and programs that are valid and reliable (U.S. Department of Education, 2004).

**Teacher Leadership** – A process that teachers utilize to empower other teachers, principals and community members to improve instructional practices and student achievement. It also involves the following: individual and team development, and organizational development (York-Barr & Duke, 2004).

CHAPTER 2.  REVIEW OF LITERATURE

*"Within every school there is a sleeping giant of teacher leaders that can be a strong catalyst for making changes to improve student learning."*

Marilyn Katzenmeyer and Gayle Moller

The purpose of this review of literature is to establish the conceptual framework for this study, which is teacher leadership, and to review the related topics to the study, which are instructional coaching and professional development.  The title of reading coach, reading specialist, and instructional coach are often used interchangeably.  Although they all work in a school setting to improve student achievement, especially in the area of reading, the review of the literature will discuss how their roles are different.  Research from dissertations, books, and peer-reviewed journals were utilized to conduct the literature review.

**Conceptual Framework: Teacher Leadership**

Teacher leadership is the conceptual framework that serves as the foundation for this study.  One formal roles of teacher leadership is instructional coaching which serves as the focus of this study.  Teacher leaders serve in various roles; however, this study focuses on only one of the formal roles of teacher leadership which is instructional coaching.  There are facilitative factors and challenges associated with the roles of instructional coaching.  The facilitative factors include the following: possessing knowledge of content and pedagogy (Borman & Feger, 2006; Center for Strengthening the Teaching Profession [CSTP], 2009; Denton & Hasbrough, 2009;

Killion & Harrison, 2005), having clearly defined roles (Knight, 2011; Shanklin, 2007), familiarity the school's culture (Killion & Harrison, 2005), acquiring strong interpersonal skills (CSTP, 2009; Neufeld & Roper, 2003), and empowering colleagues (Moller & Pankake, 2006).

**Challenges to Teacher Leadership**

However, there are also challenges which impede the success of teacher leaders, particularly instructional coaches.  These factors include the following: lack of clarity regarding the role of teacher leaders (Johnson & Donaldson, 2007; Natale, Bassett, Gaddis & McKnight, 2013; York-Barr & Duke, 2004), having insufficient time to collaborate with teachers (Johnson & Donaldson, 2007; Natale et al., 2013; York-Barr & Duke, 2004), lack of training (Natale et al., 2013), being consumed with clerical duties (Borman & Feger, 2006; York-Barr & Duke, 2004), and encountering teachers who are resistant to change (Richard, 2003).

**Benefits of Teacher Leadership**

Schools can benefit in many ways by cultivating teacher leadership.  Some teacher leaders receive professional experiences; others receive formal training by obtaining advanced degrees and going through a rigorous process to obtain National Board Certification (Center for Strengthening the Teacher Profession [CSTP], 2009).  Teacher leaders reap the benefits when they are empowered by others to take leadership roles.  Their self-esteem and work satisfaction improves, and schools showed high academic achievement when teachers were afforded opportunities to take leadership roles (Harris, 2005).

Katzenmeyer and Moller (2009) reported that the benefits of teacher leadership consist of the following: (a) professional efficacy, (b) retention of quality teachers, (c) overcoming resistance to change, (d) improving performance, and (e) influencing others.  If teacher leaders

are an integral part in leading in a change initiative, other teachers are less likely to resist change (Katzenmeyer & Moller, 2009).

**Benefits for the Organization**

Teacher leaders serve in different leadership roles, but each role benefits the school organization. Why are teacher leaders necessary within schools or across school districts and what are their benefits for the schools? The rationale for teacher leadership as reported by Moller and Pankake (2006) include the following: building organizational capacity, modeling democratic communities, empowering teachers, and enhancing teacher professionalism. Each rationale is discussed in greater detail.

**Building capacity.** Teacher leaders build capacity within their schools by encouraging and empowering their colleagues to assist with school improvement initiatives, serving on planning committees, mentoring new teachers and participating in professional book studies (Chodoroff, 2007). Additionally, Fullan (2008) described capacity building as a "hill-climbing" process that is challenging, but can be successfully implemented. He discovered that peers' expectations of one another are positive when they interact purposefully to accomplish goals.

**Modeling democratic communities.** Moller and Pankake (2006) described the democratic model of teacher leadership as challenging, requiring a certain amount of courage from both teachers and administrators. When administrators share leadership with teacher leaders, they are modeling an example of the requisite process for the successful development of democratic communities.

**Motivating others.** People are motivated when they are afforded opportunities to establish their own goals. According to Pink (2009), mastery, autonomy, and purpose are motivating factors when people engage in exploratory work.

**Improving teacher professionalism.** Teacher leaders are more effective when they are supported by their principals and their roles are acknowledged. However, when teacher leaders are not supported, a barrier to coaching and teacher leadership can emerge (Heineke & Polnick, 2013; Margin, 2007; Richard, 2003).

## What are the Roles of Teacher Leaders?

Teacher leaders are afforded the opportunities to lead while influencing other teachers in a positive way. They also help build leadership capacity and improve student achievement (Katzenmeyer & Moller, 2011). Their instructional support is imperative because of the large number of distractions principals experience with school management and operations. Leana (2013) reported that teacher leaders are usually more skilled in knowing what their schools need than outside consultants who sometimes lack experience in public education.

Teacher leaders can serve as mentors, encourage their peers, develop leadership capacity within their school, and help retain other teachers. Teachers serve in leadership roles both formally and informally (Danielson, 2007). Formal roles fulfilled by teacher leaders include the following: serving as an instructional coach, department chair, master teacher, action researcher, graduation specialist, and mentor (Center for Strengthening the Teaching Profession [CSTP], 2009). Informally, teachers volunteer to implement new initiatives. Certain knowledge, skills, and dispositions are needed when teachers serve in leadership roles (Bormann & Feger, 2006; Danielson, 2007).

Teachers must possess a broader range of skills when working with adult learners as opposed to working with children. These skills can be categorized in five areas, which include the following: (1) communication, (2) collaboration, (3) knowledge of content and pedagogy, (4) working with adult learners, and (5) systems and thinking (CSTP, 2009). Possessing the ability

to communicate effectively is a critical component of teacher leadership. It goes beyond speaking and listening, but also involves effectively comprehending the perceived intent of the person delivering the message and determining whether there were impediments which hindered the effective communication between the speaker and the listener. A teacher leader is more likely to be overwhelmed with challenges if he or she is not an effective communicator. Additionally, "…effective communication is finding ways to get around interference so that the message we want to communicate…becomes the message that is perceived by our audience" (Knight, 2007, p. 60).

What kinds of knowledge, skills, and dispositions do coaches need to perform their duties? Killion and Harrison (2005) stated that coaches need skills in three key areas: content-specific instructional expertise (Burkins & Ritchie, 2007; Denton & Hasbrouck, 2009; Feger, Woleck, & Hickman, 2004), strong inter-personal skills (Burkins & Ritchie, 2007; Feger, Woleck, & Hickman, 2004), and sensitive communication skills (Neufeld & Roper, 2003). Coaches should possess the ability to "diagnose teachers' needs and adjust their responses to meet the particular instructional needs when working in the classroom (West & Staub, 2003, p. 19). Dole (2004) stated: coaches need to be highly proficient in teaching reading and have been successful teaching reading in the classroom. They also need be "reflective practitioners" who can diagnose and articulate what they observe in a classroom.

Teacher leaders often serve as mentors and provide guidance to improve instructional practices. They are also known to help develop leadership capacity and improve teacher retention (Heller, 2004; Katzenmeyer & Moller, 2011). Serving in various leadership capacities also helps teacher leaders strengthen their skills as well. Consequently, they should be afforded opportunities to expand their knowledge beyond the classroom (Nappi, 2014).

**Formal roles.** As a resource provider, teacher leaders share professional resources including web resources, assessment tools and other instructional material (Killion & Harrison, 2007). Instructional specialists provide research-based teaching strategies and provide professional development for teachers. Teacher leaders who serve as curriculum specialists work closely with teachers to provide training on curriculum standards, and to create pacing guides to help teachers determine how to pace their teaching practices (Killion & Harrison, 2007). Most importantly, they share the school's vision and ensure it is aligned with the classroom teachers' professional goals. They help their colleagues analyze data in all content areas to determine whether teachers need to modify instruction, in order to improve student achievement or utilize additional resource to improve instructional practices. They also analyze data to determine whether students have mastered the skills their teachers taught them. Teacher leaders who serve in the capacity of data coach must first acquire the requisite skills and expertise to disaggregate student data utilizing various methodologies. Curriculum specialists and coaches are tasked with training teachers how to understand the standards and connect them to instructional practices (Killion & Harrison, 2007; Trach, 2014).

Teacher leaders serve as mentors for new and veteran teachers who could benefit from receiving additional support in classroom management, as well as in other areas. Teacher leaders also serve as department chairs, and serve on various committees at the school and district level. Also, teachers observe current trends or areas of concern across gender and race. Teacher leaders have the potential to become "catalysts for change, visionaries… never content with the status quo but rather always looking for a better way" (Larner, 2004, p. 32). One of the most important characteristics of a teacher leader is possessing the ability to demonstrate that he or she is a continuous learner and is willing to help others succeed. Teacher leaders shape the school's

culture whether they serve in the capacity of a teacher leader formally or informally (Killion & Harrison, 2007).  Additionally, teacher leadership can be characterized as "involving a range of personal responses and organizational factors that are likely to mediate how these new roles are defined and performed by individual teacher leaders" (York-Barr & Duke, 2004 p. 278).

**Informal roles.**  Some teacher leaders do not have leadership titles, but they are viewed and respected as leaders by their peers.  Informal teacher leadership still has a strong influence on instructional practice and student achievement (Moller & Pankake, 2006).  These teacher leaders are described as competent, credible, and approachable.  Additionally, they are passionate and committed towards their work.  They are cognizant of the social and political structures that exist within their organization (Moller & Pankake, 2006).

**Who is Responsible for Developing Teacher Leaders?**

Principals are instructional leaders who play critical roles in developing teacher leaders. These primary roles of the principal include establishing the following for the school: clear goals, a vision, and high expectations (Southern Regional Education Board [SREB], 2010). Although principals play a role in developing leadership skills in teachers, pre-service programs also play a vital role in equipping teachers with skills and dispositions essential for the development of teacher leaders.  Colleges and universities offer degrees in teacher leadership to help teachers acquire the prerequisites to successfully emerge into leadership positions. Katzenmeyer and Moller (2009) reported that graduate programs across the country are emerging to help prepare teachers for leadership.  Many states are taking a closer look into establishing standards and licensure for teacher leadership.

In order to be successful, teachers need support from the following: colleagues, administrators, local boards of education, higher education instructors, state governments, as

well as national leaders (Anderson, 2008). It is also important that different levels and entities invest in quality leadership. Teachers grow in their leadership skills and organizational perspectives when they take on leadership roles (Harris, 2005). Teachers' self-esteem and work satisfaction also improves when they are empowered to serve in this capacity. A higher level of student achievement was reported when schools obtained strong teacher leaders (Lambert, 2003).

**Quality Teacher Leadership Principles**

Moller and Pankake (2006) reported how relationships play a key role in establishing quality teacher leadership in the following quote:

> The essence of teacher leadership is relationships-administrator to teacher, teacher to teacher, teacher to student… No other responsibility is more difficult for a principal than balancing existing, new, and potential adult relationships. As teacher leaders seek to influence other teachers, they will depend on the principal to help safeguard their relationships with those they hope to influence. (p. 9)

Based upon findings from Moller and Pankake (2006), teacher leaders develop over time, and they need high levels of energy. The authors also identified three principal leadership behaviors for promoting, building and sustaining quality teacher leadership. They are as follows.

**Build relationships**. One of the most important components of sustaining quality teacher leadership is establishing positive relationships. However, teachers are not always willing to accept leadership roles. Principals have to build trustworthy relationships and help teachers feel confident that they possess the requisite skills to successfully lead others.

**Distribute power and authority.** Periodically when principals leave their school, there are not enough teacher leaders who have the skill sets that will enable them to smoothly transition into leadership roles and continue school improvement efforts that were previously

established.  "Principals who view their power and authority as tools for expanding leadership are at the forefront in leading today's schools" (Moller & Pankake, 2006, p. 10).  Teacher leaders thrive in a supportive culture where teachers are actively engaged in leadership roles and different perspectives are welcomed.  Consequently, principals should look for opportunities to establish a democratic community.  When teachers are not provided opportunities to make decisions through a democratic process, usually their students are also not afforded those opportunities (Moller & Pankake, 2006).

**Provide professional learning.**  Teacher learning should be one area of focus along with providing quality professional development, which is also critical.  The training should include helping teachers analyze data and determine the appropriate teaching strategies (Moller & Pankake, 2006).

## How do Teacher Leaders Emerge?

Different factors enable teacher leaders to emerge.  In order to become teacher leaders, they were first successful as classroom teachers.  They were viewed as agents of change in their schools and across districts.  The Center for Strengthening the Teaching Profession [CSTP] (2009) defined teacher leadership as "knowledge, skills, and dispositions by teachers who positively impact student learning by influencing adults… beyond the classrooms" (p. 2).  Additionally, there are certain knowledge and skills they need to be effective leaders of change.  These skills include the following: (a) working with adult learners; (b) communication; (c) collaboration; (d) content and pedagogy (Burkins & Ritchie, 2007; Ferger, Woleck & Hickman, 2004); and (e) systems thinking.  Teacher leaders utilize their expertise in different areas, particularly in influencing school-wide policies and programs, teaching and learning, communication, and community relations (CSTP, 2009).

Principals build a culture and climate of trusting relationships to help teacher leaders thrive (Anderson, 2008; Trach, 2014). Additionally, Anderson (2008) reported principals were more likely to collaborate with teachers if they worked more than four years at the same school.

The original framework created in Figure 1 provides a visual representation of what researchers believe are facilitative factors and challenges which impede the success of instructional coaches' roles.

# Opposing Forces

**Facilitative Factors of
Instructional Coaches' Roles**

**Challenges of
Instructional Coaches' Roles**

Knowledge of Content & Pedagogy

Lack of Time

*Being a Continuous Learner*

Teacher Resistance

**Original**

**Conceptual
Framework**

Teacher
Leadership

(Instructional
Coaching)

Strong Inter-Personal Skills

Role Ambiguity

Clearly Defined Roles

School's Climate

Receive Training & Support

*Clerical Work*

*Empower Colleagues*

*Lack of Support*

School's Culture

Lack of Content Knowledge

*Figure 1. Original Conceptual Framework*

## Instructional Coaching

In order to meet the guidelines established by the No Child Left Behind Act of 2002 school districts across the United States implemented reading initiatives. These initiatives afforded districts the opportunities to hire reading coaches to provide ongoing training and quality professional development to enhance instructional practices and student achievement (International Reading Association, 2004). Many elementary students were not proficient in reading. Therefore, the Reading First Initiative, established as a result of the No Child Left Behind Act of 2002, provided assistance to states and local districts to implement quality reading programs for students in kindergarten through third grade across the United States. However, the program that school districts implemented had to be scientifically based on research in order to ensure every child was able to read by third grade (U.S. Department of Education, 2004). One of the criteria for the Reading First Initiative, as reported by the International Reading Association [IRA] (2004), provided teachers with professional development in the five components of reading. The components are: phonemic awareness, phonics, fluency, vocabulary, and comprehension. Another goal was to appoint literacy coaches in schools as a strategy to improve reading instruction (Denton 2003; Deussen, Coskie, Robinson, & Autio, 2007). Many reading coaches now have more expanded roles and are given the title of an instructional coach.

### What is an Instructional Coach?

Instructional coaches work in a variety of settings with teachers and administrators to provide a variety of research-based instructional practices that are designed to improve student achievement in all academic areas (Knight, 2007). Additionally, Knight (2005) described an instructional coach as

an on-site professional developer who teaches educators how to use proven teaching methods.  Instructional coaches use a repertoire of effective instructional practices to collaborate with teachers, identify practices that will effectively address teachers' needs, and help teachers implement those practices.  They also utilize a variety of professional development procedures to encourage the widespread, high quality implementation of effective teaching practices.  (p. 17)

Dole (2004) described a coach as someone who provides daily support both formally and informally.  Coaches were originally utilized to help teachers improve their instructional practice in reading.  However, this model of professional development was the most problematic for elementary students in high poverty schools.  According to Denton (2003), schools that needed improvement were identified and awarded funds to improve reading performance under the Reading First Initiative.  Additionally, in order to meet the guidelines for eligibility, school districts were required to meet the following criteria:

- have the highest percentage of students reading below grade level in that particular state;
- either the U.S. Department of Housing (in urban areas) or Department of Agriculture ( in rural areas) must incorporate an Empowerment Zone or Enterprise Community;
- Have substantial needs of Title I schools or possess the greatest percentages of Title I students in the state.

Teachers were also required to provide explicit instruction in five critical areas that were identified as the premise for the Reading First Initiative.  These areas were: phonemic awareness, phonic word recognition, reading fluency, vocabulary development, and reading comprehension (Denton, 2003).

The term "instructional coach" is sometimes used interchangeably with reading coach and literary coach, but they are not synonymous (Knight, 2008). However, some of their roles and responsibilities are similar. "The literacy coach naturally focuses on literacy issues, the instructional coach focuses on a broader range of instructional issues including: classroom management, content enhancement, specific teaching practices or formative assessment" (Knight, 2011, p. 13). Knight (2007) reported that reading coaches periodically work one-on-one with students, administer assessments in order to determine a student's placement in reading, or provide professional development for teachers. However, instructional coaches do not focus on any particular content area, but are skilled in various areas and have good communication skills. Trach (2014) stated that the goal of an instructional coach is to build teacher capacity which will positively impact educators, instructional teams, and the whole school over time.

**Coaching in Alabama**

During 1998, the Alabama State Department of Education implemented a statewide K–12 reading initiative to rectify the problem of having over 100,000 students in grades three through eleven who could not read on grade level. Consequently, the Alabama Reading Initiative (ARI) provided a reading coach in every elementary school in the state from 2003 to 2011. During this time frame, fourth grade students in Alabama who were assessed on the National Assessment of Educational Progress (NAEP) made more gains than any other state in the nation (Sawchuk, 2015). Additionally, ARI provided the following support: professional development, onsite support, and literacy coaches to over 1,000 schools. The primary goal was to help students become proficient readers and prevent reading difficulties (Alabama State Department of Education, 2013). The NCLB mandate stated that every child in a public school would be

required to read proficiently by 2013–2014 school year.  Additionally, public schools would be held accountable for making Annual Yearly Progress (AYP) toward the goal.

In 2012, some school systems in the state of Alabama began moving away from using the title of 'reading coach' to using 'instructional coach'.  The focus is now not solely on assisting teachers in the reading content area, but providing support in all content areas to improve instructional practices (Alabama State Department of Education, 2013).

During the 2014–2015 school year, approximately 83% of the ARI annual budget was allocated to 136 Local Education Agencies (LEAs) for 782 coaches totaling $39,760,790.  Additionally, 13% of their budget was allocated for regional coaches totaling $6,261,546.  Regional coaches are employed by the State Department of Education and provide professional development to teachers and coaches in their designated region throughout the school year as needed. (Alabama State Department of Education, 2015).

**Roles and Responsibilities of Instructional Coaches**

Instructional coaches play a variety of roles depending upon the needs of teachers and students and the vision of the principal.  Coaches model appropriate instructional strategies for teachers and work collaboratively to help them improve (Knight, 2005).  Coaches play a critical role in fostering teacher leaders.  They take the view of teachers into consideration when planning professional development.  However, this type of leadership requires different skills because coaches move away from working directly with students (when they served as classroom teachers) to working with their peers (Sweeney, 2011).

In Table 1, Sweeney (2011) outlined the roles of teacher leaders and gave suggestions, which include ways district leaders can support and develop teacher leaders.  The information included in the table does not include all of Sweeney's suggestions.

A more detailed list is included in her book called *Student Centered Coaching: A Guide for K-8 Coaches and Principals.*

Table 1

*A Curriculum for Developing Teacher Leaders*

| Roles of Teacher Leaders | Suggested for Teacher Leaders |
|---|---|
| Facilitating Small-Group Collaboration | Practice and experience using a variety of collaborative processes, protocols, and norm-setting procedures<br>Strategies for maintain focus during group work<br>Intervention techniques for facilitating difficult conversations<br>Tools and strategies for planning group work<br>Strategies for evaluating the impact of group work |
| Piloting New Programs or Initiatives | Early exposure to new materials<br>Problem solving related to the implementation of new materials<br>Observations of new materials as they are in use<br>Coaching cycles based on the use of new materials<br>Group work with others who are piloting new materials, such as problem solving and sharing of ideas<br>Group work to suggest adaptions to a new program based on the teacher leaders' experience |
| Sharing Craft Knowledge and Expertise | Varied opportunities to participate in a school culture in which all teachers are encourages to share craft knowledge<br>Participation in learning labs (model classrooms or peer learning labs) as the lab host or observer<br>Coaching cycles of informal coaching conversations |
| Hosting Learning Labs (model classrooms or peer learning labs) | Support from the coach to plan for an upcoming observation<br>Coaching cycles in advance of an observation to deepen reflection and implementation<br>Resources to support teacher leaders to articulate the research that drives their instruction<br>Exposure and practice with the protocol that will be used for an observation |
| Mentoring New Teachers | A mentoring program that aligns with the requirements for teacher induction<br>The development of a specific set of skills for mentoring new teachers<br>Instruction in working with adult learners |

Adapted from Sweeney, D. (2011). *Student centered coaching: A guide for K–8 coaches and principals* (pp. 133–134). Thousand Oaks, CA: Sage.

Instructional coaches have different responsibilities that may vary across school districts. However, the International Reading Association recommends the following criteria be considered when hiring instructional coaches. The coaches should: (a) be highly skilled teachers at the level they are coaching; (b) acquire extensive knowledge relating to the reading process, acquisition and instruction (which may include obtaining reading certification, or an advance teaching degree); (c) have prior experience to strengthen teachers' instructional practice; (d) demonstrate exemplary skills presenting or leading teacher conferences and teacher groups; and (e) possess the skills to observe, model, and provide constructive feedback to teachers (Deussen, et, al, 2007). On some campuses, instructional coaches have over forty different roles. They are expected to have different roles and responsibilities, but they should include a few which are specific and highly prioritized (Wren, 2005). According to Borman and Feger (2006), sometimes coaches are overwhelmed with paperwork and clerical assignments, which take away from working directly with teachers. Consequently, there is a concern that coaches may not be effective if their efforts are spread too thin (Smith, 2007; Walpole & Blamey, 2008).

Based upon findings from Albritton (2003), some instructional coaches serve in split roles by working directly with students as a reading specialist and also working part-time with teachers. Additionally, some school districts require instructional coaches to serve multiple schools, and other districts assign a coach to an individual school or grade level.

The Alabama Department of Education (2013) describes the coach as one who plans regularly with the school, local education association (LEA), and with the State Department of Education (SDE) to accomplish the following:

- Influence a commitment to the vision of the Alabama State Department of Education: Every Child a Graduate–Every Graduate Prepared

- o Support school and LEA literacy efforts to reach the goal of students performing at or above proficiency in all areas

- o Collaborate with LEA, school, and SDE personnel to plan for and support coaching that impacts teaching and student learning

- Implement, strengthen, and support instruction and intervention efforts K-12

  - o Demonstrate a high level of skill in coaching and instruction

  - o Use age-appropriate instructional strategies in all tiers to improve students' skills

  - o Work collaboratively to monitor, analyze, and use data daily in all tiers to make decisions for improved teaching and learning

- Plan and or facilitate professional learning to improve instruction and student learning in grades K–12

  - o Utilize a variety of coaching strategies to differentiate support (grade level, departmental, and vertical team meetings; individual and peer coaching)

  - o Use a collaborative approach to determine, design, and deliver professional development. (Alabama Department of Education, 2013, p. 36)

There are many benefits of coaching although the roles and responsibilities differ across school districts and depends on the needs of the school. Educational agencies at the state level have established their own criteria and expectations of coaches. Additionally, there are different coaching models that are implemented across school districts.

## Models of Coaching

Joyce and Showers (2002) reported that 95% of knowledge is transferred when participants receive support that is ongoing once they return back to the classroom, thus providing research credibility for coaching. There are different models of educational coaching

that have been researched.  They include the following: cognitive coaching, literacy/reading

coaching, and instructional coaching.

**Cognitive Coaching**

One form of coaching that is widespread in American schools is cognitive coaching.

"Cognitive coaching is predicated on the assumptions that behaviors change after our beliefs

change and puts coaching at the heart of the coaching relationship" (Knight, 2007, p. 10).  It

involves reflecting on and planning one specific event, which could extend over several years.

The coach and colleague must interact on numerous occasions and reflect on a variety of

activities.  Cognitive coaching requires multiple interactions and opportunities for a teacher to

reflect upon the teaching and learning experience.  It consists of the following elements:

planning the actual conversation, having the opportunity for the coach to observe the event, and

designating time to reflect (Knight, 2007).

**Literacy and Reading Coaching**

Literacy or reading coaches share similar responsibilities depending upon the school

district.  The titles are often used interchangeably because they concentrate on assisting teachers

with different reading strategies, and instructional tools that will help students read and

comprehend written text.  Additionally, literacy coaches in some areas are tasked with helping

students improve their writing skills instead of working directly with teachers (Knight, 2007).

However, reading coaches may work directly with students, administer reading diagnostic

assessments, and provide professional development to teachers.  The International Reading

Association [IRA] (2004) defined a literacy coach as one who specializes in reading, and

supports teachers by providing professional development and other instructional resources.  IRA

has also developed a set of standards to clarify the confusion between the roles of literacy and reading coaches.

**Instructional Coaching**

Instructional coaching is considered the most recent form of coaching. Some school districts are currently utilizing reading and literacy coaches, but others are moving away from coaches specializing solely in reading and moving to coaching all content areas (Alabama Department of Education, 2013). An instructional coach provides professional development opportunities to teachers on-site, using research-based methods that are designed to improve their instructional practices. Instructional coaches utilize various methods including the following: conducting one-on-one meetings, planning collaboratively with teachers, modeling instructional strategies, co-teaching a lesson, and observing and providing teachers with feedback (Knight, 2007). Coaching is more visible at the school level when coaches interact with teachers and students; however, in order for the coaching efforts to be effective, they should be dispersed throughout the district (The Annenberg Institute for School Reform [AISR], n.d).

**Components of Coaching**

There are specific components to the coaching process. Knight (2007) identified seven components that helped instructional coaches respond to challenges of personal change which included the following: enroll, identify, explain, model, observe, explore, and refine. Each component of coaching is outlined below.

**Enroll.** This involves getting teachers on board and enrolling them into the coaching process. This can be done in a variety of ways including, but not limited to, one of the five methods: interviews, small-group presentation, large-group presentations, informal conversation, workshops, and principal referral (Knight, 2011).

**Identify.**  During this process, the teacher and coach agree to a partnership and work to identify specific measurable goals and how to work towards them while measuring progress. The goal can include something the teacher needs to implement as outlined in the Continuous Improvement Plan (CIP) or modeling a lesson to improve the teacher's instructional practice.

**Explain.**  The coach and teacher identify the goal and a specific practice to be implemented and then the coach explains the practice using checklists.  This method has been studied in various professions from surgeons to educators.  A Harvard medical professor studied the benefits of physicians and surgery team using basic checklists during surgery, which saved more lives and money (Knight, 2011).  Also, practitioners from the Kansas Coaching Project discovered using checklists helped coaches and other professional developers communicate more effectively and precisely their expectations.  However, not all teaching practices can be articulated solely using this method (Knight, 2011).

**Modeling.**  Teachers are given choices (partnership model) so they can decided whether they want the specific instructional practice modeled in their classroom.  If they agree, then the coach provides a copy of an observational protocol or checklist.  During this phase, the instructional coach clarifies who is responsible for enforcing classroom management during the presentation.  Joyce and Showers (2002) studied the impact of modeling new information or strategies and concluded if modeling is not a component of coaching, none of the participants will be able to transferred knowledge to practice.

**Observe.**  The coach utilizes the same observation instrument that teachers use to observe the coach.  The coach should focus on positive instructional practices, which are usually encouraging to the cooperating teacher.  Jones (2007), noted that teachers' eyes are trained to naturally view what is wrong or mistakes; therefore, teachers should focus on what their students

do correctly to avoid them becoming defensive (2007).  This same concept applies to adult learners.

        **Explore.**  In this step, the instructional coach and cooperating teacher discuss student data as soon as possible and have open and honest dialogue.  The coach should allow the teacher to speak at least 70% of the time.  It is also important for both partners to discuss whether they have reached the goals that were established at the beginning of the process.

        **Refine.**  Coaches make changes that meet the needs of the cooperating teacher and continue providing support.  Most importantly, teachers need sufficient support to improve their teaching practice in order to impact student achievement.

## Partnership Principles

        One of the components of being an effective coach is having the ability to establish partnerships by building trusting relationships.  The instructional coach and principal must work collaboratively in order for the coach to successfully help the teachers.  This relationship is critical to the mission of the school (Smith & Spaulding, 2012).  There should also be good communication, collaboration, and trust between teachers and coaches to establish a positive relationship.

        Knight (2011) stated that there are seven partnership principles that are important aspects of instructional coaching.  The partnership principles are as follows: equity, choice, voice, dialogue, reflection, praxis, and reciprocity.

- Equity – Instructional coaches share an equal partnership with teachers and recognize how important their thoughts and beliefs are.  Instructional coaches seek to glean knowledge from and understand teachers' perspectives instead of persuading them;

- Choice – Teachers should have a choice in determining what and how they learn. Since partners are equal, individuals decide and make choices both independently and collaboratively. Coaches have been less successful working with teachers who were not afforded a choice;

- Voice – Each person's point of view is respected. The goal is for instructional coaches to empower teachers and encourage them express openly their opinions about the content they will learn.

- Dialogue – Authentic dialogue should be evident between instructional coaches and teachers. It is important for coaches to listen more and avoid imposing and dominating the conversation.

- Reflection – An essential component of professional learning is reflection. Teachers are encouraged to consider different ideas before accepting them. Being able to reflect helps one to accept or reject philosophies.

- Praxis – Teachers are able to apply what they have learned to authentic situations, which provides a meaningful experience.

- Reciprocity – All partners benefit from the learning experiences; however, the instructional coach should be willing to receive just as much as he or she provides. The instructional coach can benefit from learning along with the classroom teachers.

Knight (2011) identified components of coaching which are essential when building partnerships with teachers, help instructional coaches overcome challenges while working with teachers. Additionally, the partnership principles are important elements that instructional coaches consider when working with teachers to improve their instructional practices.

**Coaching Cycle**

According to the State Department of Education (2013), the Alabama Reading Initiative created a coaching cycle, which consists of five components: pre-planning, planning with the teacher, modeling for teacher, reflection, and debriefing.  The first component is the preplanning stage.  During this step, the coach and teacher decide which standards will be taught, and utilize data to determine the specific focus of the lesson.  Next, the coach and teacher decide which instructional strategies to utilize and determine how they will build the students' background knowledge.  The coach and teacher will also decide whether formative or summative assessments will be used.  Then, during the third step, the coach models the lesson for the teacher.  However, this step can be modified depending upon the need of the individual teacher. The coach may choose to model for the teacher, side-by-side, or allow the teacher to practice. The fourth step includes a time for reflection of the lesson taught, for both the coach and teacher. Debriefing is the last step, which involves giving honest feedback about the lesson and determining the subsequent steps to take (Alabama State Department of Education, 2013).

**Challenges of Instructional Coaching**

Instructional coaches face many challenges while working with adult learners to improve their instructional practices; however, providing support for teachers poses a different type of challenge (Knight, 2007).  There are strategies coaches and administrators can utilize to help make it less challenging.  One of the greatest challenges for coaches can be establishing a partnership with teachers who are reluctant to change (Knight, 2011).  If teachers do not view new instructional practices as powerful and easy to implement, they are less likely to implement them.  In order to overcome some of the challenges, principals are charged with creating a school climate where teachers feel comfortable working with an instructional coach.  Knight (2011) and

Heineke and Polnick (2013) reported that coaches should not be utilized to judge or evaluate the classroom teacher's instructional practices. When administrators lack a clear understanding of coaches' roles, in some instances they place coaches in roles which are perceived as supervisors or quasi-administrators (Borman & Feger, 2006; Fullan & Knight, 2011). These findings may provide an explanation as to why instructional coaches experience resistance from teachers (Richard, 2003). Therefore, it is important for the principal to provide leadership and communicate to teachers that coaches do not evaluate their performance.

Instructional coaches are tasked with partnering with teachers to model practices in the classroom, observe, and engage in supportive dialogue. It is the principal's responsibility to establish clearly defined roles for the coaches in order for them to have a more rewarding experience (Heineke & Polnick, 2013; Knight, 2011). Fifty coaches attended a state-sponsored workshop and they were asked how they utilized their time. Over 75 percent of the coaches stated that they spent less than 25 percent of their time coaching during the previous week. More than 40 percent reported spending 10 percent of their time or less coaching during the previous week before the workshop. Many of the coaches also reported that their roles and responsibilities were "poorly defined… they ended up doing quasi-administrative or clerical work rather than improving instructions." They photocopied papers for teachers, filed documents, or ordered supplies, instead of helping teachers improve their instruction (Fullan & Knight, 2011, p. 52).

Confidentiality is another challenging factor for instructional coaches. Teachers are more likely to work collaboratively if they believe that conversations with coaches are confidential. As a result, it is easier for teachers to openly express their views. Knight (2011) stated that teachers are more likely to implement new practices when coaches implement a partnership

approach.  Additionally, when principals provide "top-down" leadership, coaches experience

greater success (Knight, 2011).  Principals work collaboratively with instructional coaches to

determine the type of professional development teachers need to improve instructional practices.

One of the primary responsibilities of instructional coaching is to provide teachers with ongoing

professional development (Knight, 2011).

**Rural Schools**

Instructional coaches in rural schools experience different challenges than their

counterparts in urban school districts.  There are different factors that may impede the work of

instructional coaches as they work collaboratively with classroom teachers to improve their

instructional practices and student achievement.  Students who attend rural school are often

transported over long distances which may impact parental involvement (Reeves, 2003) and are

often isolated from libraries, museums, colleges and universities (Lindahl, 2011).  Based on

findings from the National Center for Education Statistics [NCES] (2009), 57 percent of school

districts in the United States are rural and of those 22.9 are minority students.  Rural schools

have a higher percentage of Caucasian students than other locales.  In Alabama, students who

attend rural schools are predominantly African American (Farmer, Leung, Banks, Schaefer,

Andrews, & Murray, 2006).

Small rural schools often do not have access to high quality professional development

that teachers need to help their students succeed academically.  Therefore, rural schools

experience difficulties recruiting and retaining high quality teachers (Beesley, 2011; Reeves,

2003).  These factors are more problematic in rural areas more than urban school districts

(Beesley, 2011).  Some instructional coaches serving rural schools in Alabama serve two

schools.  Other challenges in rural schools include inadequate funding.  Based upon findings

from Johnson, Strange, and Madden (2010), there are 800 rural southern and southwestern districts operating with less state and local funding per pupil than other rural and non-rural school districts.

**Urban Schools**

Based upon findings from the United States Department of Education (1996), urban school districts are faced with different challenges that schools in other locales. Urban schools have larger enrollments than rural school and these students are more likely from low socioeconomic backgrounds. "Forty percent of students in urban districts attend high poverty schools…10 percent of suburban and 25 percent of rural attend high poverty schools" (United States Department of Education, 1996).

<div align="center">

**Professional Development**

</div>

Professional development is a continuous process that is utilized by school districts to enhance teachers' pedagogy and skills to successfully implement best practices. Professional development, which occurs in a variety of formats, includes the following: conference, workshop, working collaboratively with colleagues, researching, and observing colleagues (Archibald, Coggshall, Croft, & Goe, 2011; Holloway, 2006). Educators utilize professional development to improve their pedagogy and impact student achievement (Darling-Hammond et al., 2009). National standards have been established to provide districts and states with quality professional development for all educators. The No Child Left Behind Act of 2002 defines high-quality professional development as that which:

- Improves and increase teachers' knowledge of academic subjects and enables teachers to become highly qualified;

- Is an integral part of broad school-wide and district-wide educational improvement plans;

- Gives teachers and principals the knowledge and skills to help students meet challenging State academic standards;

- Improves classroom management skills;

- Is sustained, intensive, and classroom-focused and is not one-day or short-term workshops;

- Advances teacher understanding of effective instructional strategies that are based on scientifically based research; and

- Is developed with extensive participation of teachers, principals, parents, and administrators. (U.S. Department of Education, 2004, p. 107)

Periodically, administrators select the professional development experiences teachers need. However, when teachers do not provide input, the learning experiences could be disconnected from practice. Professional development must be a rigorous, continuous process that is connected to practice, includes teacher collaboration, embedded follow-up and constant feedback (Archibald, et al., 2011; Darling-Hammond & Richardson, 2009).

One of the primary goals for professional development opportunities is to equip educators with a plethora of knowledge on how to improve student achievement. Darling-Hammond, Wei, Andree, Richardson and Orphanos (2009) conducted a study comparing the quality and amount of professional learning opportunities of teachers in the U.S. and those abroad. The researchers concluded that public school teachers in the United States do not receive the amount of professional learning opportunities like their counterparts in other nations. The research also stated teachers need approximately 50 hours of professional development in a specific area to

improve their content knowledge; however, most opportunities in the U.S. are much shorter. Furthermore, nine out of ten teachers in the United States received professional development that consisted primarily of short-term conferences or workshops (Darling-Hammond, et al., 2009).

**Joyce and Showers' Model of Professional Development**

Joyce and Showers (2002) outlined the significance of coaching as a key component of the professional development elements utilized when educators receive training in the following areas: theory, demonstration, practice and coaching (see Table 2). They concluded that professional development is more effective when teachers receive on-going support when they return to their classrooms to implement the new instructional practices. When teachers receive training in the form of a lecture only, usually none of the information is transferred into practice. If the presenter models the new concept, about 30% of knowledge is acquired, but it still does not transfer to practice. However, the greatest amount of knowledge is obtained and transferred to practice when coaching becomes a part of professional development. Teachers on average need 20 separate instances of practice to master a new skill. However, more practice is needed for teachers to master extremely complex skills (Joyce & Shower, 2002).

Table 2

*Joyce and Showers Professional Development Model*

| | Professional Development Outcomes | | |
|---|---|---|---|
| **Professional Development Elements** | **Knowledge Level** (Estimated percentage of participants understanding content) | **Skill Level** (Estimated percentage of participants demonstrating proficiency in the instructional practices) | **Transfer to Practice** (Estimated percentage of participants regularly implementing instructional practices in the classroom) |
| **Theory** (e.g., presenter explains content–what it is, why it is important, and how to teach it) | 10% | 5% | 0% |
| **Demonstration** (e.g., presenter models instructional practices) | 30% | 20% | 0% |
| **Practice** (e.g., participants implement instructional practices during the session) | 60% | 60% | 5% |
| **Coaching** (e.g., participants receive ongoing support and guidance when they return to the classroom) | 95% | 95% | 95% |

Joyce and Showers (2002)

There are different models of professional development in which teachers can engage. Sparks and Loucks-Horsley (1989) described the following five effective models of staff development for teachers, which are designed to improve their knowledge and skills:

- **Individually guided**: Teachers determine their own goals and activities with this staff development model, which allows teachers to discover answers to problems when they are able to choose the learning mode.

- **Observation/Assessment:** Teachers receive feedback from a colleague about instruction and on student learning which are essential for professional growth.

- **Development/Improvement Process**: This model affords teachers the opportunity to solve problems that may be associated with school improvement or curriculum development processes.

- **Training:** The presenter establishes a clear set of objectives or outcomes and the training is more traditional workshop type session.

- **Inquiry:** There are a variety of models including small groups or by the faculty teachers can chose from Teachers identify a problem they are interested in pursuing and gather data to further investigate the problem.

**Characteristics of Effective Professional Development**

There are different characteristics of effective professional development. Professional development is most effective when it is aligned with school improvement goals, and when content standards are evaluated regularly (Penuel, Fishman, Yamaguchi & Gallaher, 2007). Furthermore, there are guidelines for educators to receive professional development that is scientifically research-based (Yoon, et al., 2007). The No Child Left Behind law includes the following as criteria for research-based professional development:

- employs systematic, empirical methods that draw on observation or experiment;

- involves rigorous data analysis that are adequate to test the stated hypothesis and justify the general conclusions (United States Department of Education, 2003).

Principals should monitor how professional development is implemented and evaluate the effectiveness of the learning experience. In order to determine the impact of professional

development, it must include a well-designed evaluation (Yoon, et al., 2007). Instructional

coaches should provide professional development that meets these criteria.

Gulamhussein (2013) described five principles, which constitute effective professional

development.  The first characteristic describes how the training should be conducted over a

period of time with follow-up opportunities to help teachers gain an understanding of the new

concepts being presented.  In nine separate studies conducted by Darling-Hammond et al. (2009),

teachers who received professional development that was given for longer periods of time

correlated with the positive impact on teacher change.  The second principle includes supporting

teachers during the implementation phase.  It is beneficial to teachers in addressing challenges

when implementing new instructional practices.  If teachers are supported during this stage, they

are likely to change their teaching practice (Truesdale, 2003).  The third principle emphasizes the

importance of actively engaging teachers when teaching a new strategy.  This principle also

relates to teachers actively engaging students to help them learn a new skill.  Principle four

explains why modeling should be included when teachers receive professional development

training.  Modeling provides a visual representation of the learning experience.  Gulamhussein

(2013) described modeling as a highly effective way of helping others understand.  The last

principle states that in order for professional development to be effective, teachers should receive

it on specific areas in their discipline.

If coaching is not a component of the professional learning experience, workshops will

not have an impact because the appropriate follow-up must be conducted (Joyce & Showers,

2002).  Darling-Hammond and McLaughlin (1999) reported how teachers and students learn in

similar ways by doing the following: studying, doing, reflecting, and collaborating with others.

Traditionally, teachers are all trained together in the form of a workshop, which is conducted by

someone who specializes in a particular content area; however teachers receive little or no follow-up to improve their teaching practice. Consequently, the professional development model does not meet the criteria for high quality professional development. "Coaching must be woven into the entire workshop process to ensure results" (Knight, 2011, p. 140). One of the instructional coach's primary roles is to provide professional development in all content areas, especially on ways to improve literacy instruction in grades K–12, utilizing research-based strategies (Knight, 2007).

In studies conducted on effective professional development, researchers found 90% of teachers who participated found it to be useless (Darling-Hammond et al., 2009). Often, professional development is presented by external consultants in the form of the traditional workshop. Additionally, Yoon et al. (2007) concluded, the most commonly used professional development is presented in the form of a "one-shot" workshop that does not change a teacher's instructional practice. In order to make an impact on teaching and learning, the training should be connected to practice, and it must include follow-up training over a period of time Darling-Hammond, et al. (2009). Professional development entails different models, which include workshops, school visits, coaching, research, and peer observation (Darling-Hammond et al., 2009). According to Joyce and Showers (2002), when coaching is a part of the training, participants are able to transfer the knowledge taught into their teaching practice.

There are certain components that are essential in order for the training to have a lasting impact on teacher practice and student achievement. Teachers must have the following as it relates to professional development:

- have a significant amount of time to learn a new teaching strategy and be afforded opportunities to implement them into the classroom;

- receive support while implementing the new concept and address challenges associated with classroom practice;

- be related to what teachers need to know in their content area;

- actively engage teachers during the initial implementation stage in order to understand the concept taught;

- receive opportunities for the new learning experience to be modeled in order to help teachers gain a greater understanding (Gulamhussein, 2013).

Based upon research conducted by Joyce and Showers (2002) on professional development, when a new concept was modeled, only 30% of participants were likely to transfer knowledge into practice. They also concluded 20% of participants were likely to demonstrate proficiency in the instructional practice and none of the participants were able to transfer knowledge into practice. Additionally, 1,300 cases were studied and the researcher revealed that professional development opportunities were only beneficial if they were intensive and ongoing (Darling-Hammond, et al., 2009). Yoon et al. (2007) reported how programs, which included less than 14 hours, were not effective; therefore, they did not impact student achievement. Instructional coaches provide professional development in various ways, but they need their own training and support before they can successfully provide training to others.

<p align="center">**Training and Support for Coaches**</p>

Instructional coaches need support and training as well as teachers. In order to be effective, coaches need a vast repertoire of skills to impart knowledge to others. Borman and Feger (2006) opined that coaches need time to "develop requisite expertise in what they are coaching." Sometimes school districts overlook the need to establish training for coaches, in order for them to help teachers improve their instructional strategies (Shanklin, 2007). In doing

so, coaches may face many challenges while working with teachers to incorporate change. The Literacy Coaching Clearinghouse outlines a variety of support strategies for school districts to implement if coaches are to succeed. First, potential coaches should have a good understanding of what their responsibilities will be before accepting the position. Shanklin (2007) reported stakeholders should also be informed about the responsibilities. A literacy team can enhance the work of the coach by working collaboratively with the coach in classrooms and helping to clarify the school's vision. Shanklin (2007) also described the importance of assisting coaches in managing their time, projects, documenting their work, and discovering resources that will help them to become more productive. Novice coaches can also benefit from shadowing experienced coaches.

## Professional Development for Coaches

What type of support would benefit instructional coaches? First, mentoring is one type of professional development strategy that is beneficial to coaches. Mentoring is defined as an "individualized process between experienced and novice teachers for the purpose of guiding, coaching, and supporting the new teacher's progression toward greater levels of competence and confidence" (Alabama Teacher Induction & Mentoring Manual, p. 11). Mentoring is beneficial to the mentor and mentee. Additionally, mentoring programs are designed to enhance leadership potential, and to retain employees (Stock & Duncan, 2010). Mentors help guide and support others with less experience to grow personally and professionally. This relationship may not be formal or long-term. Researchers also concluded instructional facilitators need mentoring in the following areas: instructional leadership, utilizing data, working with challenging staff, and sustaining personal motivation (Stock & Duncan, 2010). There is not a substantial amount of

research that identifies how instructional coaches are mentored.  More research is needed in this area.

Research reveals that coaches need professional development as well as teachers (Annenberg Institute for School Reform, n.d).  Additionally, coaches need training on how to analyze student data, learn how to conduct grade level meetings, and how to communicate effectively with teachers and administrators.  Coaches also need professional development that will enhance their knowledge and skills in a variety of areas that will assist them as they serve in the capacity of a mentor or coach (Shanklin, 2007).  As stated in the previous section of the literature review, professional development meets the criteria of being effective if it includes the following: must be rigorous, connected to practice, include follow-up and feedback (Archibald, et al*.,* 2011; Darling-Hammond & Richardson, 2009).  Coaches' training and professional development needs to follow these guidelines as well.

Neufeld and Roper (2003) discovered additional elements of professional development for coaches.  They opined the importance of coaches and principals understanding "the big picture" of why they are engaged in school reform and why change is necessary.  "Coaches and principals need to understand the scope and rationale for what they are being asked to do if they are to successfully engage teachers in their work" (Neufeld & Roper, 2003, p. 12).  Coaches need to be cognizant of where to receive help when they experience problems implementing their work.  Periodically, coaches request professional development to improve their coaching skills in order to enhance the teachers' instructional practice.

Based upon the findings from Neufeld and Roper (2003), school districts should consider challenges when creating effective professional development for coaches.  They also reported one of the challenges as not having enough people in the field who possess the knowledge and

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skills to lead the coaching programs.  Consequently, school districts are faced with the challenge

of creating and staffing professional development programs that will provide coaches with an in

depth knowledge to lead others.

A study was conducted in a western state that reported that only 56% of instructional

coaches had mentors, yet 90% thought mentoring was important for new coaches.  The study

conducted by Stock and Duncan (2010) analyzed what instructional coaches thought their

mentoring needs were and how they were mentored.  The Wyoming legislature passed the

School-Based Instructional Facilitators/Instructional Coaches Grant which was designed to

provide additional funding for facilitators and instructional coaches (Mockelmann, 2007).  The

grant allowed the state to hire 398 teachers as facilitators and coaches.  The purposes of the

instructional facilitators were: (a) to provide professional development, (b) to work with teachers

to improve instructional practices, and (c) to help align instruction with curriculum standards and

assessments tools.  The researchers also revealed the greatest barrier to providing mentoring

programs in Wyoming was the lack of time, limited state guidance, and the lack of training

(Ehrich, Hansford & Tennant, 2004; Stock & Duncan, 2010).

## Alabama's Coaching and Training Program

Alabama has a mentoring and induction program for new teachers and principals.

Different school districts within the state have mentoring programs, which are not as detailed as

the induction program.  However, Alabama does not have a formal mentoring program for

instructional coaches.  Instead, the Alabama Reading Initiative (ARI) has established coaching

communities or professional learning communities that are designed to assist new and veteran

instructional coaches.  The purpose of professional learning communities (PLCs) is for

professionals to collaboratively improve their own practice (Annenberg Institute for School

Reform, n.d.). PLCs are more than support groups and include the following characteristics: They require group members to reflect openly and honestly in a collaborative manner about their practice while seeking to improve in their current capacity. One of the main objectives of a PLC is to help members grow personally and professionally on a continuous basis while working to improve their school and district. The following are activities which promote commitment and serve as hallmarks of PLCs:

- engage in collaborative problem solving and specific problems, while identifying needs, and articulating a focus for the work;

- construct knowledge related to current issues and practices in quality teaching and learning;

- discover different ways to develop a "culture of ongoing professional learning" in a school or district; and

-  observe, analyze, and provide explicit feedback and ideas that is related to school data (AISR, n.d., p. 2).

New coaches in Alabama are partnered with a regional coach from their district during the first year. The regional coach's role includes working collaboratively to support the instructional coach, help analyze student data, observe classrooms, and/or work on the coaching cycle. New coaches are required to attend training for three consecutive days in the summer. In the past, they received training for one week, but it was reduced because of the lack of funding. Throughout the school year, new coaches attend at least three additional training sessions with coaches from other school districts to share concerns, problems and gain knowledge in a collaborative setting (Alabama State Department of Education, 2013).

**Summary**

An instructional coach in a K–12 school is defined as one who provides professional development on-site to teachers, and utilizes a variety of research-based instructional practices by conducting one-on-one meetings, planning collaboratively with teachers, modeling instructional strategies, co-teaching, observing and providing teachers with feedback (Knight, 2007). Instructional coaches are typically expert teachers who come out of the classroom to support their peers as teacher leaders. Therefore, teacher leadership was chosen as the conceptual framework for this study. Teacher leaders serve in different leadership roles, but each role benefits the school organization. The rationale for teacher leadership, as reported by Moller and Pankake (2006), include the following: building organizational capacity, modeling democratic communities, empowering teachers, and enhancing teacher professionalism. Instructional coaches are the ones who most often deliver job-embedded professional development to teachers. Professional development is a continuous process that is utilized by school districts to enhance teachers' pedagogy and skills to successfully implement best practices. Thus, the instructional coach is an important new role in schools. The role and responsibilities of instructional coaches were investigated from the perspectives of principals, instructional coaches and teaches. A literature map is included in Figure 2 to represent how the researcher organized and planned each section of the review of the literature section.

**Literature Map**

**The Conceptual Framework**

**Teacher Leadership**

- Benefits for the Organization
- Roles of Teacher Leaders
- Developing Teacher Leaders
- Quality Teacher Leadership Principles
- How Teacher Leaders Emerge

**What is an Instructional Coach?**

**Roles and Responsibilities of Instructional Coaches**

**Models of Coaching**

- Cognitive, Literacy & Reading
- Instructional Coaching
- Components of Coaching
- Partnership Principles
- Coaching Cycle

**Professional Development**

- Joyce & Showers Model
- Effective P.D.

**Training and Support for Coaches**

Alabama's Coaching & Training Program

*Figure 2. Literature Map*

CHAPTER 3.  METHODOLOGY

The purpose of this study was to determine the challenges, and facilitating factors instructional coaches encounter while enacting their roles instructional coaches play in elementary and middle schools.  The central research question for the study was: How are the roles of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches?  The following sub-questions helped guide this study: 1) How do principals perceive the roles of instructional coaches?  2) How do instructional coaches perceive their roles? 3) How do teachers perceive the roles of instructional coaches?  4) What facilitative factors enhance the success of instructional coaches?  5) What are the challenges which impede the success of instructional coaches?

This chapter consists of the following seven sections: (1) qualitative research and methodology, (2) participants, (3) researcher's role, (4) unit of analysis: interviews and artifacts, (5) data analysis, (6) validation strategies, and (7) the summary.

**Qualitative Research and Methodology**

Qualitative research was the most appropriate method of inquiry to use in order to capture the essence of the role instructional coaches play in rural and urban elementary and middle schools.  This multiple case study was conducted to gain an in-depth understanding of how the roles of instructional coaches are enacted and perceived by administrators, teachers, and instructional coaches.  The participants were afforded the opportunity to give detailed accounts of their experiences as instructional coaches that were not known to the researcher.  Yin (2008)

reported that a multiple case study should be utilized if the researcher believes that the participants in the study are "replications" of one another. Principals, instructional coaches and teachers in this study were described as three cases; therefore, this study aligns with the criteria of a multiple case study. Additionally, multiple case studies should include a detailed description of each case in order to gain an in-depth understanding of the subjects (Creswell, 2007; Stakes, 1995). Qualitative research design allows the researcher to establish a relationship with the participants in the study within their environment (Creswell, 2013). Therefore, the researcher interviewed the participants in their own schools where they were most comfortable.

## Participants

The participants in this multiple case study represent principals, instructional coaches, and teachers from an urban and rural school district. The researcher utilized a purposeful sampling method in order to select participants from specific locations because they "purposefully inform an understanding of the research problem and central phenomenon in the study" (Creswell, 2008, p. 156). Therefore, this study was bounded by location. According to Creswell (2003), binding the case ensures that the scope of the study remains reasonable.

The criteria for choosing the participants were as follows: 1) The instructional coaches had worked in the role for at least two consecutive years; and 2) Each coach had served at least five years as a classroom teacher, prior to becoming an instructional coach. The researcher sought the assistance of the state regional trainer of instructional coaches to identify instructional coaches in two diverse school districts (rural, urban) who met the criteria above. The researcher contacted the potential participants by email and phone to ascertain their willingness to be interviewed. The researcher interviewed two instructional coach, three administrators, and four classroom teachers from a rural and urban school district. According to Creswell (2013), in

order to complete an in-depth qualitative study and be able to interact with the participants, the researcher should have a limited number of participants.

## Researcher's Role

Creswell (2008) stated that qualitative researchers should position themselves in their writing and make their "position" explicit.  The researcher's role in this study was to determine how instructional coaches emerged into leadership positions.  At the time the study was conducted, the researcher served as a district instructional coach in a suburban school district located in a southeastern state, which served approximately 6,950 students.  Additionally, the researcher was housed in a Title 1 (K–5) elementary school, which served approximately 800 students.  The researcher also coached new teachers across the school district from grades K–12 primarily at the beginning of each school year.  Before the researcher matriculated into the role of an instructional coach, she taught third grade for eleven years and served as a third and fourth grade reading intervention teacher.  She taught second grade during her first year in the educational field.  The researcher was cognizant of the biases and experiences that she had pertaining to the study; therefore, she made a conscious effort to bracket her experiences in order to understand the position of the participants.

## Unit of Analysis: Interviews and Artifacts

The researcher chose to use interviews and artifacts to gather the data needed for this study.  Before beginning the study, the researcher field-tested the interview protocol. Instructional coaches who work in the same school district as the researcher agreed to participate in a field test of the interview protocol, in order to ensure the interview questions were clearly understood and related specifically to the research problem.  Based on their feedback, the researcher made revisions to the interview protocol after conducting the field test. Additionally,

the researcher submitted a "Research Protocol Review Form" to the Office of Human Subjects Research at the state university in which the researcher was enrolled. After receiving approval from the university's Institutional Review Board, the researcher began conducting the study.

The researcher sought the assistance of the regional trainer of instructional coaches to identify instructional coaches in two different school districts (rural and urban) who met the criteria above. The researcher contacted the potential participants by email and phone to ascertain their willingness to be interviewed. The researcher received permission to conduct interviews with instructional coaches, principals, and classroom teachers from different school systems in this southeastern state. Before each interview, the researcher presented the participants with an informed consent document, ensuring that they understood their rights as a research participant, as well as the safeguards that would be in place to insure their anonymity. The researcher utilized a semi-structured interview protocol with a list of questions based on concepts found in the review of literature on instructional coaching, teacher leadership, professional development, rural, and urban schools. Probes and follow-up questions were asked where appropriate. Each interview lasted approximately one hour. The interviews were audio-taped using digital recording machinery.

## Data Analysis

After conducting the interviews, the researcher transcribed the audiotapes precisely, and analyzed the data by utilizing a method called coding. This process included analyzing data for similarities of the information reported in the interview and compiling them into manageable segments (Schwandt, 2007). However, when conducting a cross case analysis, the researcher also looked for opposing views that were reported (Creswell 2013; Stake 2006). In hand-coding the data, the researcher implemented a five step process created by Roberts (2010) for analyzing

the interview transcripts. First, the researcher thoroughly read all transcribed interviews twice before establishing themes and patterns. Creswell (2013) stated that "themes in qualitative research are broad units of information that consists of several codes aggregated to form a common idea" (p. 185). The researcher began the initial coding process as themes emerged. Next, the researcher grouped the interview responses according to similarities and differences, and tagged the most significant information by developing a master coding list of the responses. During the third step, the researcher reviewed all transcripts, documented when references were repeated, and finalized the coding. The researcher identified themes, patterns, and categories and aligned them with the research questions in the fourth step. Themes were organized in order for the researcher to create a "conceptual schema" instead of having only a list of themes (Schreier, 2012). The researcher analyzed themes within and across each case. In the final step, the researcher reviewed all transcripts to ensure that primary themes and patterns corroborated with the data obtain from the interviews. This was done to establish validity of the data.

**Validation Strategies**

The researcher utilized different strategies to ensure validity of the data. According to Pyett (2003), "a good researcher cannot avoid...returning again and again to the data to check whether the interpretation is true to the data and the features identified are corroborated by other interviews" (p. 1170). The first validation strategy was implemented when the interview protocol was designed. Interview questions were aligned with the research literature on teacher leadership, instructional coaching, and professional development that was accessed as a background to this study. The second validation strategy was the field-testing of the interview protocol with practicing instructional coaches and seeking their feedback, which resulted in refining the interview questions.

The third set of validation strategies pertained to achieving accurate information from the participants. After the interviews of the participants were complete, the researcher returned the transcribed interviews to each participant for their reading, to ensure accuracy. This component of qualitative research is described as member checking. It is an important procedure for establishing credibility (Lincoln & Guba, 1985; Schwandt, 2007). During this process, the researcher afforded each participant an opportunity to ensure that the information that was received during the interview process was accurately recorded and represented the views of the participants. Each participant received the transcript in its entirety.

The fourth validation strategy is called triangulation. The researcher utilized multiple data sources to collect information on the perceived and enacted roles of instructional coaches who serve in rural and urban school districts. The following artifacts were obtained to ensure validity of the study: job descriptions from the participating schools' websites, agendas of meetings, emails (if applicable), and documents from the Alabama State Department of Education. Different forms of data should be utilized to ensure validity of a study (Creswell, 2013; Stake, 2006). According to Yin (2008) "physical artifacts are a strength in a multiple case study because the artifacts provide insight into cultural features of the organization, as well as insight into the technical operations of the organization" (p. 102). The findings of a case are more likely to be convincing and accurate when it is corroborated by several resources in order to provide insight on a particular theme or perspective (Creswell, 2013; Yin, 2008).

The last validation strategy pertained to the accuracy of coding and theming the findings of the study. The researcher returned to the data multiple times with at least a day passing between re-visits to the transcripts, to ensure that no element of importance was missed as the coding and theming took place.

**Summary**

The purpose of this study was to-determine the role of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches. The researcher conducted this multiple case study by utilizing a qualitative research design. The researcher purposefully selected participants in this study who worked in one southeastern state in the United States and only in public school systems. The researcher implemented validation strategies throughout the study to insure accuracy of the findings.

CHAPTER 4: FINDINGS


The purpose of this study was to determine the role of instructional coaches as enacted and perceived by administrators, teachers, and instructional coaches. The researcher conducted a multiple case study, in which the cases analyzed were principals, instructional coaches, and teachers. The researcher utilized in-depth interviews to determine the roles, challenges, and facilitating factors of instructional coaches in elementary and middle schools. The administrators and teachers were selected because they worked directly with the instructional coaches and could describe their perceptions of the roles of instructional coaches. The instructional coaches were selected in order to help the researcher gain insight through studying first-hand experiences of the coaches' roles. The participants in the study worked in school systems in the southeastern part of the United States, including rural, and urban elementary and middle schools. A multiple case study was designed in order to answer the central question: How are the roles of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches? The following sub-questions helped guide this study:

1) How do principals perceive the roles of instructional coaches?

2) How do instructional coaches perceive their roles?

3) How do teachers perceive the roles of instructional coaches?

4) What factors enhance the success of instructional coaches?

5) What are the challenges which impede the success of instructional coaches?

The researcher utilized a purposeful sampling method in order to select participants from specific locations because they "purposefully inform an understanding of the research problem and central phenomenon in the study" (Creswell, 2008, p. 156). The schools were selected because they were located in a rural and urban district respectively. Additionally, the researcher wanted a contrast in settings to see if there were differences in the roles of instructional coaches due to the context of the school. The criteria for choosing the instructional coaches were as follows: 1) The instructional coaches worked in the role for at least two consecutive years; and 2) Each coach had served at least five years as a classroom teacher, prior to becoming an instructional coach. Once the principals and instructional coaches agree to participate, they recommended the names of classroom teachers whom they thought would participate in the study. The researcher sought the assistance of the state regional trainer of instructional coaches to identify instructional coaches in two diverse school districts (rural, urban) who met the criteria above.

The researcher contacted potential participants by email and phone to ascertain their willingness to be interviewed. The researcher interviewed two instructional coaches, three administrators, and four classroom teachers from a rural and urban school district. One additional instructional coach, two principals, and one teacher from the rural school district agreed to participate in the study, but later the instructional coach who served both schools changed her mind. Therefore, the researcher was unable to conduct the study at these schools.

The researcher chose to use interviews and artifacts to gather the data needed for this study. Before beginning the study, the researcher field-tested the interview protocol. Instructional coaches who work in the same school district as the researcher agreed to participate in a field test of the interview protocol, in order to ensure the interview questions were clearly

understood and related specifically to the research problem.  Based on their feedback, the researcher made revisions to the interview protocol after conducting the field test.

## Study Setting (District #1)

Greater School District (pseudonym) was an urban school district located in the southeastern part of the state, which served over 25,000 students including 95% African-America, 4% Hispanic, and 1% White.  The district served Pre-K through twelfth grade.  Eighty-eight percent of the students qualified for free or reduced lunch.  Schools in this district utilized instructional coaches to help improve teaching and learning in different ways including: observing teachers and providing feedback, modeling lessons, co-teaching, providing professional development, analyzing students' data, and finding resources to improve classroom instruction.  Regional coaches from the state department were assigned to school districts across the state to provide schools with additional support to improve student achievement.

### Tour of School #1

Successful Elementary School (pseudonym) is a Title 1 school from the Greater School District, located in the southeastern part of the state.  In the past, it was recognized as a bronze winner in urban education.  It served over 800 students in Pre-K through fifth grade, and employed over 40 classroom teachers, an instructional coach, reading, math, science, and technology coaches.  The students' work and murals depicting educational themes were displayed on the walls throughout the school.  The school's garden was abundant with different fruits and vegetables that the students planted with the help of local partners in education.  Nature was a part of the school's curriculum.

As the researcher visited each classroom, she noticed each class had anchor charts displayed around the room to help students remember skills that were previously taught.  The

researcher also noticed how well behaved the students were as they began their morning work and listened attentively to their teacher.  It was evident that routines and procedures were previously established because students worked quietly and stayed in their seats when the teacher was not in the room.  The teachers welcomed the researcher to their school and some encouraged the researcher to come back and observe different lessons they presented throughout the day.

The researcher observed the leadership team meeting and discussing several topics ranging from the upcoming Fall Festival, Spelling Bee, RTI concerns, and ways they could improve teaching and learning in their school.  A banner was displayed in the library that welcomed the students to read because "Success is in the Pages."  The researcher noticed a visitor reading with a student in the library.  Additionally, there were other visitors in the school who assisted students and teachers in the classrooms.  The students played indoor activities inside of the gym because it was raining.  They seemed to enjoy playing the activity, which gave them the opportunity to compete against other students and remain active.

### Study Setting (District #2)

Rural County School District (pseudonym) is located in the east-central part of the state. The enrollment has fluctuated and decreased due to the closing of the area industrial plants.  The district consisted of seven elementary schools, two middle schools, and two high schools (11 schools) which served students in Pre-K through 12th grade.  Schools in this district shared instructional coaches between two schools.  Some were shared between two elementary schools, or between an elementary and middle school, and between an elementary and high school.  The student to teacher ratio was 16 students for every full-time teacher.  The rural school district's use of instructional coaches contrasted from other districts throughout the state.  In other areas of

the state, some instructional coaches served the entire district and others were housed in each

elementary school.

**Tour of School #2**

Farm Elementary School in Rural County School District was a small rural school that

was located in close proximity of two churches within a small community.  It served over 300

students from kindergarten through fifth grade.  The students' artwork could be viewed through

the window of the main entrance of the school.  The researcher observed students assisting the

principal as she posted students' work for display.  Their work was visible throughout the school

on the walls and in the classrooms.  The instructional coach was assisting a group of English

Language Learners (ELL) who required additional practice as they learned English.  She worked

with them each day before the school day officially started although she was only scheduled to

be there two days per week.  Afterwards, she worked with a group of third graders to help

improve their reading comprehension skills and provided intervention for thirty minutes daily.

Next she matriculated to a first grade classroom and worked with a veteran teacher who

previously retired from a different state.  The new teacher was not familiar with the Alabama

Reading Initiative; therefore, she needed additional support in order to effectively provide

instruction to elementary students in reading.  The instructional coach modeled the reading

lesson for the novice teacher.  As the instructional coach interacted with teachers in the hallway,

they appeared relaxed and seemed to have a good rapport with the coach.

**Tour of School #3**

Stem Middle School was a Title 1 school also located in Rural County School District.  It

served over 600 students and it was the largest middle school in the central-eastern part of the

state.  The students were afforded opportunities to participate in various extra-curricular

activities including sports, the Honor Society, and Student Government Association. The

principal at Stem Middle School was there to encourage and celebrate with student athletes and

reminded them that they would lose a game, but learn a valuable lesson from not winning. There

were bulletin boards with inspirational posters displayed in the front hallway which encouraged

students to aspire to become scientists, and inventors, and it reminded them that they were all

special. Another bulletin board displayed students' goals for the New Year. The board also

contained pictures of students and their writing samples, as well as pictures of them as they

worked in the classroom.

Teacher #5 had the vision statement of the school posted in the classroom along with

posters of historical events, the periodic table, reading stories and motivational posters. She had

pictures of current and former students posted behind her desk to remind students that her

classroom was "a safe place to learn."

Table 3

*Demographics of Participating Schools*

| School | Black | White | Hispanic | Asian | Other | Total |
|---|---|---|---|---|---|---|
| Stem Middle | 240 | 408 | 13 | 4 | 1 | 667 |
| Farm Elementary | 82 | 190 | 21 | 1 | 8 | 303 |
| Successful Elementary | 619 | | 201 | | 17 | 817 |

<center>**Participants' Descriptions**</center>

**Principals**

Principal #1 at Farm Elementary School (pseudonym) served in that capacity for four years. She described her desire to work with struggling readers since she was a fourth grade student. She served as a classroom teacher for ten years, and subsequently as a reading coach before she became an assistant principal. Afterwards, she became the principal at Farm Elementary School. Principal #1 served 26 years in education and held a specialist degree in Education Leadership.

Principal #2 served as the principal at Stem Middle School (pseudonym) for three months and as an assistant principal of a high school for ten months. She has worked in the educational field for 10 years with the majority of her experiences as a secondary math teacher. Principal #2 held a Doctor of Philosophy Degree in Educational Leadership.

Principal #3 served as the principal at Successful Elementary School for eight years. He also served as a special education teacher and assistant principal for three years. He received national recognition for the outstanding work he performed as a principal. He also served on numerous committees in his district and created different innovative initiatives to motivate his students to succeed. Principal #3 earned a Doctor of Philosophy Degree in Instructional Leadership.

**Instructional Coaches**

Instructional Coach #1 served 18 years in Rural County School District (pseudonym). She taught first grade for eight years prior to becoming a reading coach and later emerged into the role of an instructional coach. She served as an instructional coach for two schools. Two days per week she worked at Farm Elementary School (K–5), and the other three days she

<center>62</center>

worked at Stem Middle School grades (6–8). She earned a Bachelor's Degree in Elementary Education.

Instructional Coach #2 served 21 years in Greater School District. She was a classroom teacher for 14 years, and later became a reading coach. She was an instructional coach for three years, and held a Bachelor's Degree in Elementary Education. She was also a National Board Certified Teacher.

**Teachers**

Teacher #1 was a fourth grade teacher who taught reading in a departmentalized setting. She taught for eleven years. She worked collaboratively with the instructional coach on a weekly basis to ensure the lesson plans were aligned with the new guidelines. The instructional coach went through the coaching cycle with Teacher #1 and provided support in many areas.

Teacher #2 taught first grade for seventeen years at Successful Elementary School. She held a Bachelor's Degree in Elementary Education. She worked with the instructional coach, and received a plethora of resources and support in creating lesson plans. The coach also modeled and co-taught lessons with her which the teacher perceived as a benefit of having being under the tutelage of instructional coach. The instructional coach also provided feedback to the teacher in order to improve her instructional practices.

Teacher #3 has a kindergarten teacher who taught a total of ten years, including three years as a fifth grade teacher at Farm Elementary School. She held a Master's Degree in Elementary Education.

Teacher #4 was a sixth grade teacher who taught nine years in Rural County School District. She was a reading teacher at Stem Middle School, and earned a Bachelor's Degree in

Elementary Education.  She only worked with an instructional coach for the past two years because her school did not have one assigned there previously.

Teacher #5 was also a sixth grade teacher who taught fifteen years in Rural County School District.  She taught nine years at Stem Middle School where she served as the science teacher.  She earned a Bachelor's Degree in Elementary Education.

Table 4

*Participants' Profile*

| Participant | Gender | Race | Years | Educational Background |
|---|---|---|---|---|
| Principal #1 | Female | White | 26 | Education Specialist |
| Principal #2 | Female | Black | 11 | Doctorate |
| Principal #3 | Male | White | 25 | Doctorate |
| Instructional Coach #1 | Female | White | 18 | Bachelor's Degree |
| Instructional Coach #2 | Female | Black | 21 | Bachelor's Degree |
| Teacher #1 | Female | Black | 12 | Bachelor's Degree |
| Teacher #2 | Female | Black | 17 | Bachelor's Degree |
| Teacher #3 | Female | White | 10 | Master's Degree |
| Teacher #4 | Female | White | 9 | Bachelor's Degree |
| Teacher #5 | Female | Black | 15 | Bachelor's Degree |

## Data Analysis Methods

A multiple case study was designed in order to answer the following sub-questions:

1) How do principals perceive the roles of instructional coaches?

2) How do instructional coaches perceive their roles?

3) How do teachers perceive the roles of instructional coaches?

4) What factors enhance the success of instructional coaches?

5) What are the challenges which impede the success of instructional coaches?

The three cases in this study were principals, instructional coaches, and teachers. After

conducting the interviews, the researcher transcribed the audiotapes precisely, and analyzed the

data by utilizing a method referred to as coding.  This process included analyzing data for similarities of the information reported in the interview and compiling it into manageable segments (Schwandt, 2007).  The researcher analyzed themes within each case, and afterwards analyzed themes by a cross case analysis.  However, when conducting a cross case analysis, the researcher also looked for opposing views that were reported (Creswell, 2013; Stake, 2006).

In hand-coding the data, the researcher implemented a five step process created by Roberts (2010) for analyzing the interview transcripts.  First, the researcher thoroughly read all transcribed interviews twice before and subsequently established themes and patterns.  Creswell (2013) stated that "themes in qualitative research are broad units of information that consists of several codes aggregated to form a common idea" (p. 185).  The researcher commenced the initial coding process as themes emerged.  Next, the researcher grouped the interview responses according to similarities and differences, and tagged the most significant information by developing a master coding list of the responses.  During the third step, the researcher reviewed all transcripts, documented when references were repeated, and finalized the coding.  The researcher presented themes, patterns, and categories and aligned them with the research questions in the fourth step.  The researcher analyzed themes within each case and across the three cases.  In the final step, the researcher reviewed all transcripts again to ensure that primary themes and patterns indeed corroborated the data obtained from the interviews.  This process was performed to establish validity of the data (Roberts, 2010).

The researcher reported the findings under each research question explaining the manner in which each case responded to the research questions.  The researcher presented emergent themes for each research question.  She also presented each case supplemented with supporting quotes, to provide a rich description of the findings in an effort to increase this study's

credibility.  Finally, the themes from each case were compared to each research question,

resulting in summary matrices for each.

<div align="center">

**Roles of Instructional Coaches**

</div>

The first three research questions pertained to the roles of instructional coaches.  The

findings are presented for the three cases in the following order: principals, instructional coaches,

and teachers.

**Principals' Perceptions of Instructional Coaches**

Six themes emerged from the principals' responses to the interview questions regarding

the roles of instructional coaches which are displayed in Table 5.   The results revealed that three

principals believed the role of instructional coaches included the following: provide support to

the classroom teachers, provide professional development, and analyze student data to improve

teaching and learning.  Additionally, two principals perceived the instructional coaches' roles

consisted of possessing knowledge in the content area they were coaching, and serving as a

liaison and leader in their school.  A quote, which represents themes, is included for each of the

principals.

Table 5

*Principals' Perceptions of Instructional Coaches' Roles*

| Themes | Principal #1 | Principal #2 | Principal #3 |
|---|---|---|---|
| Provides Support | "She supports the teachers by co-teaching lessons, and modeling." | "She supports the teachers and me when we need additional resources." | "My coaches support me by listening to my vision. They tell me what they think will work." |
| Provides Professional Development | "Instructional coaches provide teachers with professional development on research based strategies to improve instruction." | "The instructional coach recently provided extensive professional development …to help teachers increase the level of rigor in the classroom." | "The instructional coach provides training with new initiatives…and determines additional professional development teachers need." |
| Analyze Data | "They help teachers identify whether their instruction is effective based on the student's data." | "I think instructional coaches…identify where the school needs to go based on data." | "They analyze data and decide what the students' strengths and weaknesses are." |
| Knowledge of Content | "They need a good understanding of the reading interferences …to help the teacher diagnose the problem." | "How can you tell me to change my lesson if you do not understand it?" | |
| Liaison | "It's almost like they are the glue between the principal and the teachers." | | "If they give you instruction, consider it as coming from me." |
| Leader | "She takes things upon herself and do what needs to be done." | "The instructional coach is on the leadership team." | |

**Provides support.**  The principals articulated their beliefs about how instructional

coaches support classroom teachers and principals in contrasting ways.  The instructional coach

supports the teacher by co-teaching a lesson, modeling different instructional strategies,

gathering and analyzing data, and creating schedules for teachers and principals.  Instructional

coaches also support principals by scheduling presenters to provide professional development for

teachers. They also support teachers by providing students with intervention in a small group setting for those who need additional support in reading, math or learning the English language. Principal #1 stated the instructional coach gave support to teachers by providing intervention in a small group setting, and provided support for her by gathering data for the principal to analyze, stating:

> They help teachers pull resources. For example if a child is having trouble in reading with nonsense words then the instructional coach pulls resources to help the teacher. She also helps me gather data to analyze so when I need it then it's right there. When it's time to test students on Global Scholar, she gets the schedule ready for them to test. That's a lot of help to me because principals cannot do it all.

The researcher asked Principal #1 what she perceived were the roles of the instructional coach, and she stated the following:

> Well, some teachers see her as a person who works with the struggling children, and as an errand girl. Sometimes we have the instructional coach to make copies, and get different things ready for the teachers. That is not her job. She is there to help those teachers that are struggling just like the children who are struggling. Even though we have teachers that have been here 30 years, some of them need their fires rekindled. The flame needs to be fanned, but she is here to help the struggling teachers learn or pull out their tools and get them started on the right path. The goal was to help them learn how to do all of this. Her job is to make sure those teachers that need extra help, and mostly the ones who are straight out of college, get the support they need. I know college is supposed to prepare you and they do a good job, but they do not prepare you for everything.

Principal #2 stated the following when asked about the instructional coach's roles:

The role of the instructional coach is to help the administration get students to where they need to be academically. My coach helps me look at data and tells me where our school needs to go and provide help for the teachers. She supports the teachers and me when we need additional resources. I realize that people really don't know how to be co-teachers. I went to my instructional coach and said, I need you to help me to come up with some professional development to help my teachers really co-teach. My focus is on collaborative teaching with special education teachers and the classroom teachers. The instructional coach was able to help me come up with a game plan on how to implement true collaborative teaching. We will start that on Thursday. We also have someone from the state department coming to train my teachers. They had introductory training and they will also have some additional professional development.

Principal #3 stated the following pertaining to the roles of instructional coaches:

They have different roles, which may include mentoring, providing guidance and assistance, modeling, and provide resources. Instructional coaches lead the teachers to where they need to go and provide support to them by providing professional development. It doesn't matter whether they are new teachers or have been teaching 25 years. Some of the veteran teachers need more coaching than some of the new ones. Instructional coaches are there to help teachers see what they cannot see. They help teachers reflect on their instruction. I cannot be everywhere all the time and assist teachers and students too so instructional coaches support me and the teachers. She collaborates with the teachers to find out what they need. She has brought a local

professor from a university to provide additional support to teachers in the area of reading.

Principal #3 referenced how all four coaches supported him by stating the following:

You know, the superintendents have their cabinet so my coaches are like my cabinet. I have a reading, math and science, technology, and instructional coach. They support me by listening to my vision. They tell me what they think will work and sometimes what will not work. Sometimes they steer me in a different direction and that's good. I don't know everything, but if I don't, they do or we can find out together.

**Professional developer.** In many school districts, instructional coaches provide job-embedded professional development to teachers within schools and across school districts. The purpose is to help teachers improve their instructional practices by incorporating research-based strategies in order to improve student achievement. Professional development is a continuous process and may be implemented utilizing instructional coaches to provide continuous support and feedback. Some school districts hire consultants who specialize in specific areas to help teachers enhance their pedagogy.

Principal #1 described her instructional coach as one who provided professional development for the classroom teachers. She believed instructional coaches should lead instructional teams, demonstrate lessons for the teachers, and allow opportunities for teachers to reflect on their teaching practices.

Principal #2 stated how she requested that her instructional coach consider specific types of professional development her teachers needed while she considered the knowledge and level of skills her instructional coach needed to possess in order to successfully train teachers. If the instructional coach did not have the necessary training to provide professional development, she

requested support from the Regional Alabama Reading Initiative Coach.  The instructional coach

recently provided extensive professional development in order to demonstrate to teachers the

correct methodology to facilitative critical student thinking and increase the level of rigor in the

classroom.  Principals #3 opined the following:

> Our instructional coach provides professional development along with the reading, math
>
> and science, and technology coaches.  When we changed standards that was a big
>
> paradigm shift from teaching basic knowledge to facilitating learning and helping to
>
> teach on a higher level of Bloom's taxonomy (sic).  The instructional coach provides
>
> training to help teachers with new initiatives, she works closely with me, other coaches,
>
> and leadership team to determine what professional development is needed in our school.

**Data analyst**.  Principals stated that instructional coaches analyzed student data to

identify students' strengths and weaknesses.  They conducted data meetings to help teachers

identify specific skills students required in order to reach a level of proficiency in a particular

subject area.  Additionally, teachers reflected on their instructional practices to determine which

strategies to utilize to meet the needs of their students based upon the results of the data.  All

principals perceived their instructional coach as one who analyzed data.  Principal #1 stated the

instructional coach's role included gathering data and interpreting students' test scores in order

to determine whether their instruction was effective based on the students' test scores.  Principal

#2 stated:

> Sometimes, teachers don't have time to work on what the data reveals which is the
>
> missing component.  I'm a data-driven instructor.  I just believe that data drives
>
> everything.  What my instructional coach can do for me is to help me look at our data.
>
> Look at it and tell me where our school needs to go and help provide assistance to my

teachers.  With everything they have going on, they don't have the time to sit down and

look at data and say, "This is the direction you need to go in."  If you don't use your data,

you don't know where your students are headed.  I think instructional coaches have to be

able to identify where the school needs to go based on the data.

Additionally, Principal #3 stated:

The instructional coach also supports me by analyzing data and deciding what the

students' strengths and weaknesses.  Teachers are required to give benchmark

assessments monthly in reading and math.  They look at their data before meeting with

the instructional coach who helps them disaggregate the data to see which skills are not

mastered.  Sometimes the coach goes in and models or co-teaches a lesson if it's an area

of weakness for the teachers.  It all goes back to having someone to look at the data and

point you in the right direction.

**Knowledge of content and pedagogy.**   Principals also acknowledged that instructional

coaches required requisite skills, knowledge, and dispositions to coach teachers in their current

content area.  However, some school districts across the state employ district instructional

coaches who work with teachers from grades K–12.  Instructional Coach #1 was assigned to an

elementary and a middle school.  The principals at these schools discussed the issues

instructional coaches faced when they are coaching teachers in a content area for which they are

not adequately prepared.  Principal #1 stated:

The type of skills and knowledge that instructional coaches need is a good understanding

of the two main content areas (reading and math).  They need a good understanding of

the reading interferences in order to help the teacher diagnose the problem and provide

the appropriate instruction.

Principal #2 further noted:

As a previous high school teacher and a current high school administrator, I realize that

we have to find a way to get someone with a secondary background to coach these

teachers. When you place an elementary instructional coach in a high school, she feels

inferior because she does not understand the content area of how to teach Pre-Calculus

and Algebra II. You cannot help me if you do not understand the content area that I

teach.

**Liaison.** Two principals perceived instructional coaches as liaisons between themselves

and the classroom teachers when they need support or have concerns because they may not feel

comfortable going directly to the principal for guidance. Principal #1 indicated the following:

I don't want instructional coaching to go away because principals are not able fill that

role. It's almost like they are the glue between the principal and the teachers. Sometimes

teachers do not always open up to the principal, but they will tell the coach and the coach

will tell the principal.

Additionally, Principal #3 stated:

The staff knows that the instructional coach, as well as the other three coaches, are my

arm and ears for me because we have 40 classrooms and I cannot be everywhere. So, if

they give you an instruction, consider it as coming from me.

**Leader.** Principals also perceived the instructional coaches as leaders because they lead

teachers in order to improve their teaching practices. Sometimes they were viewed as leaders

because they exceed the requirements in order to improve student achievement within their

school. The researcher observed Instructional Coach #1 serving in this capacity the morning the

interviews were conducted. The instructional coach arrived at 7:15 a.m. and began working with

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students who needed additional support with learning the English language.  The parents agreed

to bring the students to school early every day to receive help from the instructional coach.  The

middle school principal also agreed to allow the instructional coach to report to the elementary

school first on the days she was scheduled to report there so the students could receive the

necessary support.  Principal #1 explained why she perceived her instructional coach as a leader.

> She does take things upon herself when she sees the needs to.  For example, she comes
>
> early every morning because she feels that the ELL students really need English in a
>
> Flash and she asked me if it was all right if she came on the days she is not here to help
>
> the students.  She brings ideas to me, we talk about them, and she's fine to go ahead with
>
> them.  She has always had leadership strengths.

Principal #2 explained:

> The instructional coach needs to help bridge the gap between what actually goes on in the
>
> classroom and what is expected to go on in the classroom.  She is not the one in the
>
> trenches, but she has to be able to direct the ones around her to improve student
>
> achievement.

## Instructional Coaches' Perceptions of Their Roles

The second research question relates to the roles of instructional coaches from the

instructional coaches' perceptions.  The findings were presented from the perceptions of two

instructional coaches from a rural and urban school district respectively.

### Instructional Coaches' Roles

There were three themes that emerged from the instructional coaches' responses to the

interview questions, which are displayed in the Table 6.  The results revealed that both

instructional coaches believed their role included the following: providing support, professional

development, and analyzing data. The instructional coaches expressed similar and contrasting

views of their roles. They both described one of their roles as one who supported classroom teachers in different ways including the following: finding research-based resources to help teachers improve their instructional practices, helping teachers create their lesson plans, modeling and co-teaching lessons.  Table 6 summarizes the themes from the instructional coaches' perceptions on their roles, with supporting evidence for each theme.

Table 6

*Instructional Coaches' Perceptions of their Roles*

| Themes | Instructional Coach #1 | Instructional Coach #2 |
|---|---|---|
| Provide Support | "The majority of my time is spent supporting a teacher who has 30 years of teaching experience from a different state who is not familiar with how it is taught in our state." | "I provide demo lessons, help teachers find resources, and create lesson plans based on the new format." |
| Provide Professional Development | "At the middle school, I trained general and special education teachers on how to implement co-teaching strategies." | "I also provide grade level professional development, which is specific to what each grade level needs." |
| Analyze Data | "I look at their data…and we talk and plan for individual students." | "We analyze data at the beginning of the year to identify our strengths and weaknesses." |

Instructional Coach #1 worked in a small rural school and supported the third grade teachers by providing daily reading intervention for a group of students struggling with comprehension, and worked with a group of ELL students before school officially starts to help them become more fluent in English.  However, the instructional coach from the urban school district, which is twice the size of the rural school, did not provide intervention for students.  She worked directly with teachers to improve student achievement.

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**Provides support.** One way Instructional Coach #1 supports teachers is by working directly with students to improve student achievement.   Instructional Coach #1 stated the following:

> I work with a group of six students every morning on a software program called English in a Flash.  I've seen it work so well.  We have a fifth grader who couldn't speak English when she was in kindergarten.  If you ask her right now how she became so proficient in English, she'll say, "That's because Instructional Coach #1 taught me English." No, I sat there beside her and allowed English in a Flash teach her.

> The researcher observed the coach working with English Language Learners (ELL) to assist them in becoming proficient in learning the English language, and working with a small group of third grade students with reading comprehension.  Additionally, Instructional Coach #1 described how she supports a first grade teacher by modeling the reading lesson.  She stated the following:

> The majority of my time at Farm Elementary School is spent supporting a teacher who has 30 years of teaching experience who has retired from a different state because she is not familiar with how we were trained in our state to teach reading.  In fact, this afternoon, I will show her how to progress monitor her students.

> The researcher was afforded the opportunity to observe the instructional coach as she modeled the reading lesson and demonstrated reading strategies for the first grade teacher.  It was evident that she had modeled lessons for the teacher previously because of how the students responded to her instruction.

> Instructional Coach #2 explained different ways she provides support at her school.  "I provide demo lessons, professional development, analyze data, mentor teachers, and I do

instructional rounds with the leadership team." She explained how she models lessons for

teachers at her school by emphasizing the following example:

> I just modeled a lesson for a teacher on how to infer by using the C.S.I. theme, which
>
> means Clues, plus Schema equals Inferences. I connect the lesson to something the
>
> students can relate to. The students were already familiar with the television show called
>
> C.S.I. I explain how detectives were on the scene to investigate or infer who committed
>
> the crime. So when we are reading a story, the author doesn't always tell us everything.
>
> The text and pictures in the book are our clues, and we use what we know to infer what
>
> the author doesn't tell us.

**Professional developer.** Instructional coaches were considered professional developers

because they provided training to help teachers change their pedagogy. Both instructional

coaches who were interviewed provided professional development to teachers in their schools

utilizing contrasting methodologies. Instructional Coach #1 explained how she worked to

provide training on methods the special education teacher should utilize when co-teaching with

the regular classroom teacher. The principal at the middle school made a request for her to

obtain supplemental resources from the state department.

Instructional Coach #2 worked collaboratively with a professor at a local university to

provide professional development for teachers to help them improve their instructional practices.

She explained:

> One of the professors from Collaborative University (pseudonym) is a friend of mine, so
>
> last year one thing I felt was that some people just need a little help in increasing their
>
> content knowledge. Once a month teachers meet with her here after school. We just
>
> work on giving them strategies to help them to understand and deepen their content

knowledge about what they're teaching. He [the principal] agreed to it. Not only did he agree to it, but he offered to pay the teachers for coming. I also provided grade level professional development, which was specific to what that grade level needed. Like Teacher #1 was asking me 'Before we start the next strategy, is it possible to have a discussion about what it looks like and how to do that before moving to the next strategy?' I agreed that we could.

**Data analyst.** Both instructional coaches stated that they analyzed data to help teachers determine if students mastered the skills that were taught. Instructional Coach #1 stated "I look at their data…and we talk and plan for individual students." Additionally, Instructional Coach #2 stated the following:

In the beginning of the school year, we analyzed the Aspire data to determine our students' strengths and weaknesses. It also helps me determine the professional development that's given. Every four to four and a half weeks each teacher administers what we call a common form of assessment. Then we analyze the data to see the progress being made. At the end of analyzing the data the teachers then determine a smart goal to move the kids that need to be moved.

## Teachers' Perceptions of Roles of Instructional Coaches

The third research question pertained to the roles of instructional coaches from the teachers' perceptions. The findings were presented from the perceptions of four classroom teachers from a rural and urban school district respectively.

## Teachers' Perceptions of Instructional Coaches

There were four themes that emerged from the classroom teachers' responses to the following interview question: How do teachers perceive their roles of instructional coaches? The

findings are displayed in Table 7.  The teachers were interviewed in their schools to ascertain

their perceptions of instructional coaches. The results revealed all four teachers believed their

role included the following:  providing support, professional development, analyzing data, and

mentoring teachers.  Table 7 summarizes the teachers' perceptions of the instructional coaches'

roles in their schools.

Table 7

*Teachers' Perceptions of Instructional Coaches' Roles*

| Themes | Teacher #1 | Teacher #2 | Teacher #3 | Teacher #4 | Teacher #5 |
|---|---|---|---|---|---|
| Provides Support | "She's my support system." | "I think she adds to the value of teaching when she models lessons for us." | "The instructional coach is like a tool for providing support to help improve student achievement." | "She models lessons and let other teachers watch as she implements new strategies." | "The support I receive from the instructional coach lets me know what works best for my students." |
| Provides Professional Development | "We receive professional development in grade specific content areas, and… interpret the standards." | "She partners with a local professor and provides training on how to implement reading strategies." | "She brings back training from ARI on different teaching strategies to help our students meet their goals." | | "We have received training on how to co-teach, and implementing reading strategies." |
| Analyzes Data | "She shows us how to look at our students' data and determine areas of strengths and weaknesses." | "Each month we work with the coach to analyze data from formative assessments to determine if students are proficient." | | "She analyzes data and provides graphs and spreadsheets for our kids so they can be responsible for reaching their goals." | |
| Mentors Teachers | "If I didn't have someone to bounce ideas …I would not feel comfortable." | "She holds my hand and leads me in the right direction." | | | |

**Provides support.** The researcher interviewed classroom teachers from three different schools, which are located in both rural and urban school districts. The teachers interviewed gave similar and different perceptions of the type of support they received from instructional coaches. The teacher interviewed at Successful Elementary School valued her instructional coach who provides what Teacher #1 described as a "tremendous amount of support" when needed. Successful Elementary is an urban school.

She's my support system.  If I'm struggling in an area, I can go to her and explain that I

am not comfortable teaching a certain area and ask if she can model and walk me through

the process.  She continues to coach me through it until I feel confident to step out on my

own and be successful in teaching it.  I use her like a Bible.  We meet on a weekly basis

to look at my lesson plans and anything else that I may need help with.  It's like she's

holding my hand.  As a teacher we really don't like to take directions from people

because we think we know it all.  I tell her to show me the areas that I need to improve in.

Additionally, Teacher #2 explained the type of support that she received from the instructional

coach who is also from the same school.  She stated the following:

She provides us with lots of resources, we get feedback, and she helps us plan across the

curriculum.  She also co-teaches with us.  I think she adds to the value of teaching when

she models lessons for us.  If I didn't have someone to bounce ideas off, I would

probably pull my hair out.  I definitely wouldn't feel confident in teaching reading.  If we

didn't have an instructional coach to lead or guide you in the right direction, I don't think

we would be able to function as a school.  I am not sure what she is required to do, but I

am sure that whatever her responsibilities are that she supersedes them.  My colleagues

from others schools stated how their instructional coaches do not provide as much

support as mine.

Teacher #3 also stated that she received resources to help her students become more

proficient in reading and math.  She described the instructional coach as a "support system"

because she was available to provide support in very specific ways.  Teacher #4 stated:

Our instructional coach helps us develop strategies to keep our kids engaged, and she

helps us with our lesson plans.  She was a reading specialist before she became an

instructional coach so she provides a lot of reading strategies. We have adopted a new

reading series called Reading Street. She also helps us understand the course of study

standards. She models lessons and actually lets the other teachers watch her implement

some new strategies. She will also co-teach a lesson and pull students to provide small

group instruction if you request it.

**Data analyst.** Instructional coaches analyzed data and met periodically with teachers or

a leadership team to determine whether students were proficient in all content areas. However, if

the data revealed areas of concern, the instructional coaches helped the teachers modify their

instruction and provided additional resources if necessary. Teacher #1 explained the following:

Every four weeks we give formative assessments in reading and math. We look at the

data with the instructional coach and determine whether our students are proficient in

those content areas. We also meet as a grade level and across grade levels. Teachers in

grades K–2 meet together and those in grades 3–5 analyze data together, which is called

vertical planning. The instructional coach shows us how to look at our students' data and

determine the areas of strengths and weaknesses. Data drives everything that we do here.

She provides resources and model lessons to help us improve teaching and learning.

Teacher #4 stated the following:

She analyzes data and provides graphs and spreadsheets for our kids so they can be

responsible for their reaching their own goals every time we have standardized test. We

administer the Global Scholars test to our students three times a year so she analyzes the

data for us. We administer tests across the district to see how our students might score on

the ACT Aspire test. Since I am on the leadership team this year, I work with the

instructional coach and she is helping me learn how to analyze data.

**Professional developer.** Four teachers described the instructional coach's role as one who provided professional development to help teachers improve their instructional practices. Teacher #1 stated "We receive professional development in grade specific content areas, and on how to interpret the standards." Additionally, Teacher #2 described how the instructional coach brings additional resources to help teachers grow professionally. "She partners with a local professor and provides training on how to implement reading strategies." The instructional coach worked collaboratively with the professor to provide training at least once a month to help teachers in the area of reading. Teacher #3 stated "She brings back training from ARI on different teaching strategies to help our students meet their goals." ARI regional coaches provided professional development to the instructional coaches throughout the year and to teachers as needed. Teacher #5 provided a specific example of professional development that teachers from her school received on utilizing co-teaching and reading strategies. The classroom teacher and the special education teacher used the co-teaching strategies to maximize instruction for diverse learners.

**Mentor teachers.** Teacher #1 stated:

If I didn't have someone to bounce off ideas, I would pull my hair out. I definitely wouldn't feel confident about teaching reading. Without her, I would not have anyone to lead or guide me in the right direction. In my opinion, the morale at this school would be low. If I have concerns that are not related to teaching, I can call her after school to discuss them with her. Instructional Coach #2 is teaching me to be a successful teacher.

Teacher #2 described her experience with the instructional coach by stating "She holds my hand and leads me in the right direction."

**Facilitative Factors Enhancing Instructional Coaches' Success**

The next research question is as follows: What factors enhance the success of instructional coaches? Principals, instructional coaches and teachers gave their perceptions on what they believed were facilitating factors enhancing the instructional coaches' success.

**Principals Perceptions of Facilitative Factors**

Three themes emerged after coding the principals' interviews which included 1) how the instructional coaches' roles were clearly defined, 2) the instructional coaches received support from the principal, and 3) the instructional coaches possess content knowledge in the area they are coaching.

**Role clearly defined**. All three principals described the importance of leaders ensuring that instructional coaches' roles were specific and that teachers understood the role as well. In some schools, the instructional coach's role was more defined than in other schools. For example, Principal #1 stated "In the past, teachers thought she was an errand girl and someone to make copies, but now they know what her job is." Principal #2 described the following:

> We had meetings with instructional coaches and teachers so each person knows his or her roles. I put my teachers and instructional coaches together so everybody understands we are on the same playing field… We meet together so we know what each person's roles. Hopefully there is not a misunderstanding about what we are supposed to do to improve student achievement.

Principal #3 described the instructional coach's role by relating it to the job description which is outlined by the Alabama Reading Initiative.

> Each school district can determine how instructional coaches are used in their schools. Administrators can make adjustments to meet the needs of the school. My instructional

coach knows what her roles are at this school and teachers know if they are given an instruction they should consider it as coming directly from me. The needs of one school may be different from the needs of another school. I tell my instructional coach what her responsibilities are.

**Support of principal.** Instructional coaches provided training to teachers and support them in a variety of ways. However, they also require training in order to help teachers improve their instructional practices. Instructional coaches in this state received training periodically from regional coaches at the State Department of Education. Additionally, the curriculum director and principal provided support for instructional coaches in some school systems. Two of the three principals believed that providing support for their instructional coaches was an important factor that helped them succeed. Principal #2 stated the following in reference to her instructional coach. "I think support is the number one thing that you can give a person. I am looking for you to succeed so I give you more compliments on the successes than the failures." Additionally, Principal #3 stated that he provided opportunities for his coaches to grow professionally. When the researcher asked him questions about the instructional coach, he often included the reading coach, math and science coach, and technology coach when he provided an answer.

**Knowledge of content and pedagogy.** Principals also acknowledged that instructional coaches need requisite skills, knowledge, and dispositions to coach teachers in the content area they are currently teaching. However, some school districts across the state had district instructional coaches who worked with teachers from grades K–12. Instructional Coach #1 was assigned to an elementary and a middle school. The principals at those schools discussed the

issues instructional coaches faced when they were coaching teachers in a content area for which

they were not adequately prepared.  Principal #1 stated:

> Instructional coaches need a good understanding of the two main content areas (reading
>
> and math).  They need a good understanding of the reading interferences in order to help
>
> the teacher diagnose the problem and provide the appropriate instruction.

Principal #2 further noted:

> As a previous high school teacher and a current high school administrator, I realize that
>
> we have to find a way to get someone with a secondary background to coach these
>
> teachers.  When you place an elementary instructional coach in a high school, she feels
>
> inferior because she does not understand the content area of how to teach Pre-Calculus
>
> and Algebra II.  You cannot help me if you do not understand the content area that I
>
> teach.

Table 8 summarizes the principals' perceptions of the facilitative factors which enhance

instructional coaches' success.

Table 8

*Facilitative Factors Enhancing Instructional Coaches' Success: Principals' Perceptions*

| Themes | Principal #1 | Principal #2 | Principal #3 |
|---|---|---|---|
| Roles Clearly Defined | "In the past, teachers thought she was an errand girl and someone to make copies, but now they know what her job is." | "I put my teachers and instructional coaches together so everybody understands we are on the same playing field." | "We've had those meetings where you know your role." |
| Support of Principal | | "I think support is the number one thing that you can give a person." | "I provide opportunities for the coaches to grow professionally." |
| Knowledge of Content and Pedagogy | "They need a good understanding of the reading interferences …to help the teacher diagnose the problem." | "How can you tell me to change my lesson if you do not understand it?" | |

**Instructional Coaches' Perceptions of Facilitative Factors**

Two themes emerged when the instructional coaches gave their perceptions of factors which enhanced their success. They believed receiving support from the principal and being a continuous learner as a coach were beneficial.

**Support of principal.** Instructional Coach #1 expressed her thoughts on what factors would assist her to become a successful coach. She discussed the last professional development the instructional coaches received from the regional coach.

Instructional coaches and principals across different regions of the state received professional development together. It was called Maximizing Administrator and Coaching Collaboration or MACC. The purpose was to receive professional learning for implementation and support of the College and Career Ready Standards. Additionally, it was designed to distinguish student centered coaching from other types of coaching for

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three days throughout the year.  Principals and instructional coaches were invited to

attend together in order for principals to gain a better understanding of how to support

ICs [instructional coaches] and discuss their roles and responsibilities within the schools.

Last year, the middle school principal didn't attend.  I felt like he was already the one that

didn't really understand my role.  That was a bummer for me.  Principal #1 was there and

she has served as an instructional coach before becoming a principal.  The one that really

needed to be there was not there.

Instructional coach #2 described how her principal provided support through his shared

leadership style which has helped in her role as an instructional coach.

If there's something that we believe needs to happen, he is not against that.  He values

our input and allows us to do what needs to be done.  If I tell him that teachers need

professional development outside the school, then he allows me to arrange that.

Another example of how the principal helped the coach succeed in her role was described

as the following:

One of the professors from Collaborative University (pseudonym) is a friend of mine.

Last year I felt that some people just needed a little help with increasing their content

knowledge.  The professor meets with the teachers after school once a month and

sometimes twice a month.  We just work on giving them strategies to help them to

understand and deepen their content knowledge about what they are teaching.  My

principal agreed to it and offered to pay the teachers for attending the sessions.

**Continuous learner as a coach.**  The researcher asked the instructional coaches about

the contributing factors of their success as an instructional coach, and they both explained how

they contributed to their own success by obtaining the necessary professional development in

order to become successful.  Instructional Coach #1 attributed part of her success as a coach to

the regional coach who was hired by the state department to provide training to instructional

coaches and teachers.  Regional coaches were assigned to schools across the state to provide

professional development and support to local school systems.

Instructional Coach #2 explained the factors that contributed to her success as an

instructional coach.

I am learning with the teachers when they need support because if I don't have the

answer, then I will find it.  I tell them to keep asking because if I do not know then I will

find out.  That is how I continue to learn.  I do not wait until someone offers professional

development…I go out and find my own because I know what I need to be successful.

Table 9 summarizes the themes from Research Question #4: What factors enhance the

success of instructional coaches?

Table 9

*Facilitating Factors Enhancing Instructional Coaches' Success: Instructional Coaches'*

*Perceptions*

| Themes | Instructional Coach #1 | Instructional Coach #2 |
| --- | --- | --- |
| Support of Principal | "It really helps when the instructional coaches and principals receive training together so they can understand our role, and what we need to accomplish." | "My principal agreed to allow a friend from a local university to work with the teachers in the area of reading. He also offered to pay teachers for attending the monthly sessions." |
| Continuous Learner | "When I need to learn more on a particular topic, I contact a regional coach to support me." | "I am learning with the teacher when they need support because if I do not have then answer, then I will find it." |

**Teachers' Perceptions of Facilitative Factors**

The research question teachers answered was as follows: What factors enhance the success of instructional coaches? The three themes that emerged were the need for instructional coaches to possess strong interpersonal skills, knowledge of content and pedagogy, and support from the principal.

**Strong interpersonal skills.** Teacher #2 believed instructional coaches needed good communication skills in order to effectively work with teachers. "I also think it would be beneficial if they shadowed another effective instructional coach to have an idea of what they need to do. They need guidelines of what they should do. I don't know if there is one." Additionally, Teacher #4 stated: "Instructional coaches definitely need to have an outgoing personality, and be able to communicate effectively."

**Support of principal.** According to the teachers, the principals provided support to teachers and instructional coaches. Teacher #1 stated "Our principal looks for people with strong qualities and he promotes the profession. He provides opportunities for teachers to present professional development so they can step out of their comfort zone." The principal allowed the instructional coach to go beyond the school and bring in additional resources for the teachers. Teacher #2 was from the same school and she stated the principal supported the instructional coach in her efforts to provide training on Saturdays. He paid the teachers who agreed to come to the training sessions which were not required. However, Teacher #4 described how the principal provided support for the instructional coach and teachers by allowing them to work together on the leadership team with the principal. The principal created the leadership team in order for teachers to work collaboratively with the instructional coach and to assist each other in problem solving to help the school overall. Another way principals supported instructional

coaches was by affording them opportunities to provide professional development that teachers needed, and gave them flexibility. "I think instructional coaches should be the ones to decide what is needed."

**Knowledge of content and pedagogy.** Some instructional coaches were required to work with teachers in elementary and middle schools. Therefore, they needed to have a good understanding of the content in the area they were coaching. Teacher #2 stated that instructional coaches "need to be well rounded and be able to help kindergarten teachers today and fifth grade teachers the next day. I believe it requires certain skills to be able to juggle back and forth from one grade to the next and from one subject to the next." Additionally, Teacher #4 believed instructional coaches should have a deep understanding of teaching reading and math. "Elementary instructional coaches need to know middle school content areas in order to be effective." Teacher #5 is from the same school and shared the same beliefs as her colleague. "They need to have content knowledge across the curriculum especially in reading." Table 10 summarizes the facilitative factors which enhance instructional coaches' success from the teachers' perception.

Table 10

*Facilitating Factors Enhancing Instructional Coaches' Success: Teachers' Perceptions*

| Themes | Teacher #1 | Teacher #2 | Teacher #3 | Teacher #4 | Teacher #5 |
|---|---|---|---|---|---|
| Strong Interpersonal Skills | | "The information can be misunderstood if the instructional coach cannot effectively articulate the message." | | "Instructional coaches definitely need…to be able to communicate effectively with teachers." | "They need good communication skills in order to present information in a way to make teachers comfortable working with them." |
| Knowledge of Content and Pedagogy | "They need to be well rounded because they help us in so many ways." | "It is important that coaches know the content areas in order to assist teachers." | | | "They need to have content knowledge across the curriculum especially in reading." |
| Support of the Principal | He allows the instructional coach to bring in outside resources to help the teachers." | "He paid teachers who attended the Saturday training by the instructional coach." | | "Let instructional coaches find the professional development teachers need." | |

## Challenges Impeding Instructional Coaches' Success

There were challenges which impeded instructional coaches from being successful. The three principals' were asked their responses on the research question: What are the challenges which impede the success of instructional coaches? These challenges were reported first by the principals, followed by the views of instructional coaches and teachers. The three themes that emerged were the following: lack of time, teacher resistance, and role ambiguity.

**Principals' Perceptions of Challenges**

  **Lack of time.**  All three principals stated the lack of time instructional coaches have to do their jobs hindered their success.  One instructional coach served two days a week at an elementary school, but she also served three days at a middle school.  The two principals from the rural school district who worked with Instructional Coach #1 discussed how time was a challenge which hindered the instructional coach's success.  Principal #1 explained the following:

   Time is the number one challenge that hinders her success as an instructional coach.

   She's not here enough to follow through with her roles.  If she starts a coaching cycle,

   she's not able to come back and reflect.  She just gets it started and then leaves it and

   comes back again.  It usually takes at least two months to get through a whole coaching

   cycle.

Principal #2 stated:

   Instructional coaches need more time to be in the classroom with teachers.  A lot of stuff

   instructional coaches do is related to testing and behavior.  Once they leave that position

   as a classroom teacher, I think the dynamics changed because they have a different title.

   They need to spend more time with the classroom teacher and help with lesson plans.

   They probably have not looked at a lesson plan since they have left the classroom.

  **Teacher resistance**.  All three principals discussed how teacher resistance was a factor which hindered the success of an instructional coach at their respective schools.  Principal #1 stated:

   Some teachers are harder than others to work with so it's just a matter of me sitting them

   down and saying we're going to do this, and you're going to do this.  You can make it

hard on yourself or you can make it easy on yourself, but you're going to do it.  That's

just like two out of the whole faculty that I would have to sit them down and talk to them.

Additionally, Principal #2 stated:

Teachers sometimes resist receiving support from the instructional coach.  You may not

get your teachers to buy into the fact that somebody is trying to help them.  I'm not

sending anyone in the classroom to watch you, or to come back and report on you.  I'm

sending someone there to assist you and enhance your instructional practices.

Principal #3 stated:

I think the biggest challenge is resistance. Teachers don't want help.  For too long,

teachers just closed their doors and there might be four of the fourth grade teachers all

doing different things at different times and were on different schedules.  It was what

they wanted to do, but now we work as a team.  We have weekly meetings every Monday

to look at where we are and our goals for the week.  I try to support them (the 4 coaches)

by letting the staff know they are my arms, eyes, and ears because…we have 40

classroom teachers and I can't be everywhere.  So, if they give you instructions, consider

it as coming from me.

**Role ambiguity:** Some of the principals reported how role confusion has been a

challenge for instructional coaches and a barrier which impedes their success.  Principal #2

discussed what she believed hinders instructional coaches from being successful.

Sometimes I don't think they know their job. It just seems like no one really told them

their purpose.  We have to create a job description for them because they don't have one.

The state came up with this wonderful idea…but no one has trained them on their job.

They need to know where the school is supposed to go and how to get the school there.

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It's like a coach out there without a game plan. They are not going to win the game. They need to know their plays. Instructional coaches need a playbook with different plays, and are able to adjust the plays based on the school you are serving. Instructional coaches need to have a game plan…they need a playbook like the football coaches, but I don't think they have one.

Principal #3 stated:

I think a big challenge for an instructional coach is when they are assigned administrative duties. It can be confusing to coaches and teachers if their roles are not crystal clear to everyone. The Alabama Reading Initiative has a document that defines what coaches can do within the school, but if you read it closely it says the instructional coach reports to the principal not central office. Some districts tell the coach what they want them to do, but it's pretty much based on whatever you need for your school and that's what the coach will follow. It may cause confusion because instructional coaches are used for different things from one school or district to the next.

Table 11 summarizes the principals' perceptions of challenges which impeded instructional coaches' success.

Table 11

*Challenges Impeding Instructional Coaches' Success: Principals' Perceptions*

| Themes | Principal #1 | Principal #2 | Principals #3 |
|---|---|---|---|
| Lack of Time | "She is not here enough to follow through with her role." | "Instructional coaches need more time to be in the classroom with teachers." | |
| Teacher Resistance | "You can make it hard on yourself or you can make it easy…, but you are going to do it." | "I am not sending anyone in the classroom to watch you, or to come back and report on you." | "Teachers do not want help." |
| Role Ambiguity | | "Sometimes I do not think they know what their job is." | "I think a big challenge for an instructional coach is when they are assigned administrative duties." |

**Instructional Coaches' Perceptions of Challenges**

The instructional coaches described additional challenges which impeded their success, including the lack of time and teacher resistance to change.

**Lack of time.** One of the common factors that hindered the instructional coaches' success, from their perspective, was the lack of time they had to work with teachers. Instructional Coach #1 was split between two rural schools. She served a small K–5 elementary school two days weekly, and a middle school with grades 6–8 the other three days. Instructional Coach #2 served an urban school with over 800 students and 40 classroom teachers from grades K–5. Instructional Coach #1 stated:

My only challenge here is time because I spend two days per week at Farm Elementary

School. I'm willing to do anything that I can to help, but they know I'm so limited. If

they really need me or want me, they have to know well ahead of time so that I can

change my schedule to accommodate them.

Additionally, Instructional Coach #2 stated "I don't have enough time to help everyone. We

have over 800 students and 40 classroom teachers."

**Teacher resistance.** Both instructional coaches perceived teacher resistance as an

impeding factor which hindered their success because some teachers were not willing to change

their instructional practices, and others did not understand the instructional coach's role which

does not include evaluating teachers. Instructional Coach #1 concluded "The next challenge that

I'm experiencing is teacher resistance at the middle school. They are going through some

growing pains over there. They have a new administrator and some adjustments are being made,

but I think it will get better." However, Instructional Coach #2 experienced teacher resistance

because teachers thought the instructional coach was evaluating their work. She stated the

following:

> I have to deal with teachers thinking that I was there to critique their work and evaluate
>
> them. It is getting better and eventually I was able to get buy-in when teachers saw how
>
> well I worked with other teachers in the school.

Table 12 summarizes instructional coaches' perceptions on challenges which impeded their

success.

Table 12

*Challenges Impeding Instructional Coaches' Success: Instructional Coaches' Perceptions*

| Themes | Instructional Coach #1 | Instructional Coach #2 |
|---|---|---|
| Lack of Time | "I am willing to do anything I can to help, but they know my time is so limited." | "I do not have enough time to help everyone." |
| Teacher Resistance | "I am experiencing teacher resistance at the middle school." | "I have to deal with teachers thinking that I was there to critique their work and evaluate them." |

## Teachers' Perceptions of Challenges

Two common themes emerged from interviewing the classroom teachers and ascertaining their perceptions on factors impeding instructional coaches' success. These included not having sufficient time to work with teachers, and teachers being resistant to changing their instructional practices. Teachers #1 and #2 taught in the same urban school but in different grades provided similar perceptions. Teacher #3 was from a rural elementary school, and Teacher # 5 was from a rural middle school.

**Lack of time.** Teachers #1 and #2 described one of the challenges their instructional coach faced was not having adequate time to serve all 40 teachers. Additionally, Teacher #1 stated, "I need our instructional coach to lead me through a step by step process, but she cannot give each teacher the amount of time needed to help implement different strategies." However, Teacher #2 explained, "Our needs are so vast and are on different levels." Teacher #3 concluded:

They are under a wider umbrella since they are now instructional coaches. They are

stretched so thin and have so many more requirements than when they were reading

coaches.  It is difficult for her to help us individually because she is serving another

school too.

Teacher #4 described a challenge, which may impede the success of the instructional coach.

One of the biggest challenges I think is time.  We need time to meet with the instructional

coach.  We do have a planning period, but planning periods get bogged down sometimes

with meetings or just regular planning.  Sometimes we have to meet after school if we're

going to meet with her.  We also have professional development scheduled for a half day

or for a couple hours at a time.  Our administration is pretty good about allowing us to be

there.  Every day is kind of hard to get with her the three days that she's there during the

week.

**Teacher resistance.**  Four teachers described one of the challenges for instructional

coaches was teachers being resistant to change. Teachers #1 and #2 were from Rural Elementary

School and Teachers #4 and #5 were from Stem Middle School.  Teacher #1 stated "There are

teachers who struggle in their content area, but will not seek additional help."  Additionally,

Teacher #2 opined that teachers need a "road map" to understand what the expectations are from

the district and the administrators.  She gave an example of the reading curriculum guide from

her school being different from the one that was developed by the district.  Although teachers

were trained to utilize the curriculum guide that was presented by the district, the principal

expected them to utilize the one that was revised at her school.  She believed this was one of the

reasons why teachers at her school were resistant to change because the school and the district

have different mandates.  She concluded "Every year I feel like I am starting over because we do

not have a road map."  Additionally, Teacher #4 explained how some of the teachers reacted to

the instructional coach when they are expected to incorporate reading strategies across the

curriculum.  "Well, I am a social studies teacher not a reading teacher and you want me to implement reading strategies."  Teacher #5 shared an example of teacher resistance from other teachers in her building.  She stated the following: "How does she know what I need?  Her background is in elementary education!"  Teacher #4 explained:

Some of the teachers are not willing to change because that's just where they are in their career, and they don't want to change.  For example, there is a social studies teacher who is constantly complaining about what the instructional coach is trying to do.  I've heard her say, "Well, I am a social studies teacher not a reading teacher and you want me to implement reading strategies?"  I guess she doesn't realize that we need to be implementing the strategies across the curriculum.  Another reason I believe there is resistance is because they do not recognize that the instructional coach is in a leadership position.  If they knew, I think they would be on board with working with her.  I think it's getting a little better than when she first came.  I haven't heard anything negative from other teachers, but I don't hear enough good things either.  I guess I could help promote the fact that she is here for us.

**Role ambiguity.**  Successful Elementary School was an urban school with over 800 students and 40 teachers, and four coaches which included the following: instructional coach, reading coach, math and science coach, and technology coach.  The two teachers interviewed stated they received support from their instructional coach, but Teacher #2 stated "There should be more support."  She explained some of the roles of the other coaches; however, some of their responsibilities overlapped with the roles of the instructional coach.  She also stated that the instructional coach needed a set of guidelines explaining what she was required to do, but she was not aware of any.  Additionally, Teacher #3 who was from the same school stated "We have

a lot of resources but they are not structured.  The instructional coach is pulled away to help with

fund raisers and for other reasons." Teacher #4 from Stem Middle School in the urban area stated

the instructional coach had more administrative duties.

Table 13 summarizes teachers' perceptions of challenges which impeded instructional

coaches' success.

Table 13

*Challenges Impeding Instructional Coaches' Success: Teachers' Perceptions*

| Themes | Teacher #1 | Teacher #2 | Teacher #3 | Teacher #4 | Teacher #5 |
|---|---|---|---|---|---|
| Lack of Time | "She may have to serve 40 teachers so someone like me needs specific details and a step by step process." | "There are some of us and our needs are so different." | "The umbrella…is much wider than before so now they are spread so then they do not spend enough time in the classrooms." | "We do not have time to meet and plan with her." | "There is not enough for us to collaborate with her because of the time constraints." |
| Teacher Resistance | "There are teachers who struggle in their content area, but will not seek additional help." | "Every year I feel like I am starting over because we do not have a road map." | | "Well, I am a social studies teacher not a reading teacher and you want me to implement reading strategies." | "How does she know what I need her background is in elementary education?" |
| Role Ambiguity | | "They need guidelines of what they are required to do." | "We have a lot of resources but they are not structured." | "She has more administrative duties." | |

**Cross Case Analysis**

The previous within-case analyses described the roles of instructional coaches from the perceptions of principals, instructional coaches, and teachers from rural and urban schools for each research question. In addition, the responses of each case to the questions about facilitating factors and impeding factors in instructional coaches' success were analyzed.  The researcher returned to the research questions, to take the broad view of the cases in comparison across each of the research questions.

## Central Question

How are the roles of instructional coaches enacted and perceived by principals, teachers, and instructional coaches?

## Sub Questions

1) How do principals perceive the role of instructional coaches?

2) How do instructional coaches perceive their roles?

3) How do teachers perceive the role of instructional coaches?

4) What factors enhance the success of instructional coaches?

5) What are the challenges which impede the success of instructional coaches?

The emerging themes from the three cases depicted the roles of instructional coaches, facilitative factors which enhance their success, and challenges which impede their success.  The themes varied from elementary to middle schools and the rural and urban schools.

## Cross-Case Themes from Research Question 1-3: Roles of Instructional Coaches

Research questions one, two, and three were related to the roles of the instructional coach. In conducting the cross-case analysis, three common themes emerged from across the three different cases which described how principals, instructional coaches, and teachers

perceived the role of instructional coaches. A summary of the cross-case emerging themes for research questions one, two, and three is presented in Table 14.

Table 14

*Perceptions of Principals, Instructional Coaches, and Teachers on Instructional Coaches' Roles*

| Themes | Research Questions 1–3 |
| --- | --- |
| | The role of the instructional coach is to… |
| Theme 1 | Provide support to teachers, principals and students |
| Theme 2 | Provide teachers with professional development to improve their instructional practices. |
| Theme 3 | Analyze student data to determine areas of strengths and weaknesses. |

**Description of Cross-Case Theme 1: Instructional Coaches Provide Support**

All three groups perceived the roles of an instructional coach as one who provides support to teachers, principals and students in a variety of ways. The primary goal was to help teachers improve their instructional practices in order to enhance student achievement. The principals utilize instructional coaches to support teachers by modeling different instructional strategies, providing resources, and intervention for students who were not proficient in reading and math. Sometimes instructional coaches obtained permission to search for training outside of the school system. Instructional Coach #2 explained "If I tell him [the principal] that teachers need professional development outside the school, then he allows me to arrange that." The instructional coaches provided additional support to new teachers and especially those who are

new to the state and may not be familiar with different state initiatives which were implemented. The researcher observed the instructional coach as she modeled a reading lesson for a first grade teacher. The teacher previously taught 30 years in a different state; however, she was not familiar with the strategies that were taught through the Alabama Reading Initiative.

Instructional coaches also provided support to principals by assisting with school-wide goals that were designed to improve student achievement. Additionally, some instructional coaches worked directly with students in small group settings to provide intervention in reading and math. The researcher observed one of the instructional coaches who served a rural school district provide reading intervention to a small group of students to help them improve their reading comprehension skills. Some of the themes overlapped because all three groups reported that instructional coaches supported teachers and principals by analyzing data and providing professional development to improve student achievement. However, they were also identified as themes that emerged in all three cases and were vital to the roles that instructional coaches played in schools. Table 15 illustrates Theme 1: Provides Support for research questions one through three with illustrative comments on how instructional coaches enact their roles in providing support for teachers, principals, and students.

Table 15

*Description of Cross-Case Theme 1 for Research Questions 1-3: Instructional Coaches Provide*

*Support*

| Theme | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches provide support to teachers, principals and students | They: | They: | They: |
| | Provide resources and model effective teaching strategies to help teachers improve their instructional practices. | Provide resources and model effective teaching strategies to help teachers improve their instructional practices. | Provide resources and model effective teaching strategies to help teachers improve their instructional practices. |
| | Add to the value of teaching and are considered a "support system." | | Add to the value of teaching and are considered a "support system." |
| | Work directly with small groups of students who are not proficient in reading and math. | Work directly with small groups of students who are not proficient in reading and math. | Work directly with small groups of students who are not proficient in reading and math. |
| | Provide feedback and help teachers reflect on their instruction. | Provide feedback and help teachers reflect on their instruction. | Provide feedback and help teachers reflect on their instruction. |

**Description of Cross-Case Theme 2: Instructional Coaches Provide Professional**

**Development**

All ten participants perceived instructional coaches as people who provided professional

development to teachers in order to help them improve their instructional practices.  The

principals helped instructional coaches decide on the type of training teachers needed based upon

classroom observations, instructional rounds, and based upon the needs of their students.  The

principals ascertained that instructional coaches should demonstrate lessons for teachers and

afford them with opportunities to reflect upon their teaching practices.

One instructional coach from the urban school district worked collaboratively with a

professor from a local university to assist her in providing training on a monthly basis on

implementing effective reading strategies.  However, the instructional coach from the rural

school district worked collaboratively with the regional coach to provide training to teachers on

how to implement co-teaching strategies.  Principal #2 from the rural middle school stated "I

realized that my teachers really do not know how to be co-teachers.  I went to my instructional

coach and I asked her to provide professional development on how to co-teach."  Both

instructional coaches provided training that was specific to the needs of each grade level.

Three of the four teachers interviewed described the professional development their

instructional coaches provided.  Teacher #3 stated "She brings back training from ARI [Alabama

Reading Initiative] on different teaching strategies to help our students meet their goals."  Table

16 illustrates the resulting theme for research questions one through three with illustrative

comments on how instructional coaches enact their roles in providing professional development.

Table 16

*Description of Cross-Case Theme 2 for Research Questions 1-3: Instructional Coaches Provide*

*Professional Development*

| Theme | Principals | Instructional Coaches | Teachers |
| --- | --- | --- | --- |
| Instructional coaches provide teachers with professional development to improve their instructional practices. | They: | They | They |
| | Conduct training sessions for teachers based on their needs and the needs of students. | Conduct training sessions for teachers based on their needs and the needs of students. | Conduct training sessions for teachers based on their needs and the needs of students. |
| | Provide training to support school-wide initiatives. | Provide training to support school-wide initiatives. | Provide training to support school-wide initiatives. |

**Description of Cross-Case Theme 3: Instructional Coaches Analyze Data**

All principals, instructional coaches and three of the five teachers interviewed described the instructional coach's roles as one who analyzed data to determine the strengths and weaknesses of the students. They also stated that analyzing data was one of the ways instructional coaches provided support to principals as well as teachers. Principal #2 stated "I believe data drives everything." Teachers assessed their students' knowledge to determine whether students mastered the skills that were taught. They utilized formative and summative assessments in the form of weekly assessments, informal observations, anecdotal records, and performance tasks to gain insight into what their students learned. According to Teacher #1, "We meet as a grade level and across grade levels…which is called vertical planning. The instructional coach looks at our students' data and determines the areas of strengths and weaknesses. The instructional coaches meet with principals and teachers to conduct data meetings for the purpose of analyzing the students' data. Principals #3 ascertained "It all goes back to having someone look at the data and point you in the right direction."

Table 17 illustrates the resulting theme 'Analyzes Data' for research questions one through three with illustrative comments on how instructional coaches enact this role.

Table 17

*Description of Cross-Case Theme 3 for Research Questions 1–3: Instructional Coaches Analyzes*

*Data*

| Theme | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches analyze students' data. | They: | They: | They: |
| | Conduct data meetings throughout the year. | Conduct data meetings throughout the year. | Conduct data meetings throughout the year. |
| | Disaggregate students' data to help teachers determine whether students were proficient in each subject area. | Disaggregate students' data to help teachers determine whether students were proficient in each subject area. | Disaggregate students' data to help teachers determine whether students were proficient in each subject area. |
| | Utilize data to modify instruction. | Utilize data to modify instruction. | Utilize data to modify instruction. |
| | Utilized data to determine the type of professional development teachers need. | Utilized data to determine the type of professional development teachers need. | |

Table 18 is a summary table which illustrates the resulting cross-case themes for research questions one, two and three, relating to the roles of instructional coaches from the principals, instructional coaches, and teachers' perspectives.

Table 18

Summary of Cross-Case Themes for Research Questions 1-3: Principals, Instructional Coaches, and Teachers' Perceptions

| Themes | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches support teachers, principals, and students. | They: | They: | They: |
| | Provide resources and model teaching strategies. | Provide resources and model teaching strategies. | Provide resources and model teaching strategies. |
| | Add to the value of teaching and were considered a "support system. | | Add to the value of teaching and were considered a "support system. |
| | Works with small groups of students. Provides feedback and help teachers reflect. | Works with small groups of students. Provides feedback and help teachers reflect. | Works with small groups of students. Provides feedback and help teachers reflect. |
| Instructional coaches provide professional development | Conduct training sessions for teachers based on their needs. | Conduct training sessions for teachers based on their needs. | Conduct training sessions for teachers based on their needs. |
| | Provide training to support school-wide initiatives. | Provide training to support school-wide initiatives. | Provide training to support school-wide initiatives. |
| Instructional coaches analyze students' data | Conduct data meetings throughout the year. | Conduct data meetings throughout the year. | Conduct data meetings throughout the year. |
| | Disaggregate students' data to determine areas of weakness. Utilize data to modify instruction. Utilize data to determine the type of training teachers need. | Disaggregate students' data to determine areas of weakness. Utilize data to modify instruction. Utilize data to determine the type of training teachers need. | Disaggregate students' data to determine areas of weakness. Utilize data to modify instruction. Utilize data to determine the type of training teachers need. |

**Description of Cross-Case Themes for Research Question #4: Facilitating Factors for Success**

The researcher utilized a cross-case analysis to describe facilitative factors which enhanced the success of instructional coaches who served in elementary and middle rural and urban school districts in Alabama. The research question was as follows: What factors enhance the success of instructional coaches?

Two of the three principals, both instructional coaches, and three of five teachers believed when principals provided support to instructional coaches they helped them become successful in their role. Some of the participants were not specific in the type of support that they thought instructional coaches should receive. However, others described support as the principal allowing the instructional coach to provide training to teachers based upon what they believed would be beneficial, and giving them flexibility to do so. One principal suggested that support was "the number one thing that you can give a person." Another principal stated that he provided opportunities for the coaches to grow professionally without specifically stating how it was achieved. One of the instructional coaches thought the principal's support helped her to succeed when her principal attended training sessions with her. Principals in this state had the opportunity to attend professional development called Maximizing Administrator and Coaching Collaboration. The goal was to help principals understand the role of instructional coaches and determine ways to provide support. The instructional coach who served an elementary and middle school was disappointed because the previous middle school principal did not attend the training. She believed this principal did not understand the role of instructional coaches. However, the instructional coach's principal from the elementary school attended the training sessions with her.

Two of the three principals, and three of the five teachers believed instructional coaches need to possess knowledge of content and pedagogy in order to succeed. Principals and teachers thought it was important for instructional coaches to have a "good understanding" of how to teach reading and math. Principal #1 stated, "They need a good understanding of the reading interferences…to help teachers diagnose the problem. Additionally, Teacher #4 said, "Elementary instructional coaches need to know middle school content in order to effectively coach middle school teachers." Table 19 illustrates two resulting cross-case themes: 'Principals Provide Support' and instructional coaches have 'Knowledge of Content and Pedagogy' for research question 4: Facilitating Factors.

Table 19

*Summary of Cross-Case Themes for Research Question #4: Principals Provide Support and Instructional Coaches have Knowledge of Content and Pedagogy as Facilitative Factors*

| Theme | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Principals provide support to instructional coaches. | They: | They: | They: |
| | Help instructional coaches succeed in their role. | Help instructional coaches succeed in their role. | Help instructional coaches succeed in their role. |
| | Help instructional coaches grow professionally. | | |
| | | Coaches receive the training they need to support teachers. | Coaches receive the training they need to support teachers. |
| Instructional coaches have knowledge of content and pedagogy | Coaches assist teachers in all content areas to help them improve their instructional practices. | | Coaches assist teachers in all content areas to help them improve their instructional practices. |

**Cross-Case Analysis of Research Question #5: Challenges which Impede Instructional Coaches' Success**

The researcher utilized a cross-case analysis to describe challenges which impeded the success of instructional coaches who served in elementary and middle rural and urban school districts in Alabama which were common across the three cases of principals, instructional coaches and teachers. They included the following: lack of time to provide support, teachers were resistant to change, and role ambiguity. Table 20 depicts these themes.

Table 20

*Cross-Case Themes for Research Question #5: Challenges which Impede Instructional Coaches' Success*

| Themes | Research Question #5 |
|--------|----------------------|
| Theme 1 | Lack of time to provide support. |
| Theme 2 | Teachers were resistant to change. |
| Theme 3 | Role Ambiguity |

**Description of Cross-Case Theme 1 for Research Question #5: Instructional Coaches Do Not Have Adequate Time**

All of the principals, instructional coaches, and four of the five teachers reported that instructional coaches did not have adequate time to successfully fulfill their obligations. One of the instructional coaches from the rural school district served an elementary school two days per week and she also served a middle school the other three days. Instructional coaches worked with teachers by utilizing a coaching cycle consisting of the following components: preplanning,

planning and modeling with the teacher, reflecting, debriefing, and providing the teacher with side-by-side practice.  Principal #1 stated "She is not here enough to follow through with her role.  If she starts a coaching cycle, she is not able to come back and reflect upon it.  It usually take two months to get through a whole coaching cycle."  Additionally, the teachers from the elementary and middle rural schools stated they did not have enough time to work with the instructional coach because her time was split between two schools.  Instructional Coach #2 who served the urban school, also had the same beliefs, stating, "I do not have enough time to help everyone.  We have over 800 students and 40 classroom teachers from grades K–5." Furthermore, the two teachers from the urban school believed that the lack of time was one of the major challenges that instructional coaches faced.  Teacher #2 stated "There are so many of us and our needs are so different."  One of the major challenges that instructional coaches faced, according to the participants, was the lack of time they spend in the classroom working with teachers.  Table 21 illustrates the cross-case Theme 1 for research question 5: Instructional Coaches Lack the Time to Fulfill Their Roles.

Table 21

*Description of Cross-Case Theme 1 for Research Question #5: Challenges which Impede*

*Instructional Coaches' Success*

| Theme | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches lack the time to fulfill their roles. | They: | They: | They: |
| | Do not have adequate time to collaborate with teachers. | Do not have adequate time to collaborate with teachers. | Do not have adequate time to collaborate with teachers. |
| | | Are spread too thin. | Are spread too thin. |
| | Do not have adequate time to reflect with teachers. | Do not have adequate time to reflect with teachers. | |

**Description of Cross-Case Theme 2 for Research Question #5: Teachers are Resistant to**

**Change**

All principals, instructional coaches and four out of five teachers believed one of the

challenges that instructional coaches encountered was teacher resistance to change. Some

teachers resisted changing their instructional practices because they believed that instructional

coaches were evaluating their performance. Principal #2 from the middle school reported, "I am

not sending anyone in the classroom to watch you, or to come back and report on you."

Additionally, the elementary principal believed teachers resisted change because they did not

want help, or did not think they needed help. Teachers must first "buy-into" what the

instructional coaches are trying to do to accomplish the school's vision.

The middle school teachers from the rural school reported observing teacher resistance

because the instructional coach's background was elementary education and not secondary.

Therefore, some teachers did not believe she understood the content in which she was coaching.

Table 22

*Description of Cross-Case Theme 2 of Research Question 5: Teachers Were Resistant to Change*

| Themes | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Teachers were resistant to change. | They: | They: | They: |
| | Resisted change because they did not want/need help or did not buy-in to coach's role in accomplishing school's vision | Resisted change because of the instructional coach's educational background | Resisted change because of the instructional coach's educational background |
| | | They thought they were being evaluated by coaches. | They thought they were being evaluated by coaches. |

**Description of Cross-Case Theme 3 of Research Question 5: Role Ambiguity**

Another challenge which hindered the instructional coaches' success was when their roles were not clearly defined.  In some schools, instructional coaches participated in walk-throughs or instructional rounds with the administrators.  The purpose of the instructional rounds was to observe teachers to determine the type of support they needed to improve their instruction.  Usually, administrators identified areas to focus on and communicated them to the teachers.  If student engagement was the focus, then the leadership team would focus on what the teachers need to do to promote student engagement and to what degree it needed to occur within the classroom.  The leadership team debriefed and reported back to the teachers what they observed.  Consequently, the instructional coach worked with the teacher to make modifications. Instructional Coach #2 explained "I have to deal with teachers thinking that I was there to critique their work and evaluate them."  However, teachers from the rural elementary school utilized the instructional coach to run errands, make copies, and provide assistance in other areas

that were not aligned with the instructional coach's role.  However, Principal #1 from that school

stated "That is not her job.  She is there to help those teachers that are struggling."  Table 23

illustrates the cross-case theme of role ambiguity for the research question relating to the

challenges associated with instructional coaches' roles.

Table 23

*Description of Theme 3 for Cross-Case Analysis of Research Question 5: Role Ambiguity*

| Themes | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| The instructional coaches experienced role ambiguity. | They:<br><br>Received additional responsibilities that did not involve coaching teachers. | They:<br><br><br><br>Teachers believed their work was being evaluated by the instructional coach. | They:<br><br>Received additional responsibilities that did not involve coaching teachers. |

Table 24 is a summary compilation of the cross-case themes for research question five, depicting the challenges which impede success for instructional coaches. This table allows the reader to see the perspectives of all three groups (cases) at a glance.

Table 24

*Summary of Cross-Case Themes for Research Question #5: Challenges which Impede Instructional Coaches' Success*

| Themes | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches lack the time to fulfill their roles. | They: | They: | They: |
| | Do not have adequate time to collaborate with teachers. | Do not have adequate time to collaborate with teachers. | Do not have adequate time to collaborate with teachers. |
| | | Are spread too thin. | Are spread too thin. |
| | Do not have adequate time to reflect with teachers. | Do not have adequate time to reflect with teachers. | |
| Teachers were resistant to change. | | Resisted change because of the instructional coach's educational background. | Resisted change because of the instructional coach's educational background. |
| | | They thought they were being evaluated by coaches. | They thought they were being evaluated by coaches. |
| The instructional coaches' role was not clearly defined. | Received additional responsibilities that does not involve coaching teachers. | | Received additional responsibilities that does not involve coaching teachers. |
| | | Teachers believed their work was being evaluated by the instructional coach. | |

**Summary**

Chapter 4 represented a detailed description of the findings for this study on the roles of instructional coaches, how they were enacted, and the facilitative factors and challenges they experienced. The researcher provided rich-detailed descriptions and direct quotations to summarize the findings based on the perceptions of principals, instructional coaches, and teachers of rural and urban school districts. Additionally, the researcher used observations to provide a more accurate account of each case presented. Sub-questions were answered and illustrative quotes were provided to describe the "within-case" findings. A cross-case analysis of themes were presented to address the five research questions on the roles, facilitative factors, and challenges of instructional coaches.

CHAPTER 5. DISCUSSION

The purpose of this study was to determine the role of instructional coaches as enacted and perceived by administrators, teachers, and instructional coaches. The researcher conducted in-depth interviews to determine the challenges and facilitating factors of the roles instructional coaches play in elementary and middle schools. The central research question for the study was: How are the roles of instructional coaches enacted and perceived by administrators, teachers, and instructional coaches?

Qualitative research was the most appropriate method of inquiry to use in order to capture the essence of the role instructional coaches play in rural and urban elementary and middle school districts. This multiple case study was conducted to gain an in-depth understanding of how the roles of instructional coaches are enacted and perceived by administrators, teachers, and instructional coaches. The findings of this study were reported in Chapter 4. However, in this chapter the following information will be included: a discussion of the research as it relates to teacher leadership, especially instructional coaches; the study's findings as reported by themes, the interpretation of the findings, limitations, implications and recommendations, the overall significance, recommendations for future research, and the summary.

**Background Literature Framing the Study**

Teacher leadership is the conceptual framework that served as the foundation for this study. The role of teacher leader emerged as a result of school districts realizing that providing professional development alone did not improve teachers' instructional practices unless coaching

was a component (Joyce & Showers, 2002; Katzenmeyer & Moller, 2009).  Teacher leaders serve in different roles both formally and informally to influence others in a positive manner.  However, they need certain skills and dispositions in order to serve in a leadership capacity (Bormann & Feger, 2006; Danielson, 2007).  Teacher leaders need to possess strong interpersonal skills (Burkins & Ritchie, 2007; Feger, Woleck & Hickman, 2004; Killion & Harrison, 2005), knowledge in specific content areas (Burkins & Ritchie, 2007; Denton & Hasbrouck, 2009; Feger, Woleck & Hickman, 2004; Killion & Harrison, 2005), and the ability to collaborate effectively with adult learners (CSTP, 2009).  Additionally, Dole (2004) stated the importance of teacher leaders being able to diagnose problems and articulate what they observe in the classroom.

The roles of teacher leaders include helping their colleagues analyze student data to improve student achievement (Killion & Harrison, 2007; Moller & Pankake, 2010; Track, 2014). Some serve as mentors for new and veteran teachers by supporting them with classroom management strategies, and provide training on curriculum standards to help improve their instructional practices.  When teacher leaders demonstrate that they are continuous learners, they are displaying one of the most important characteristics of a teacher leader (Killion & Harrison, 2007).  Based upon findings from Anderson (2008) and Trach (2014), principals support teacher leaders by building a school climate of trusting relationships.  They play a critical role in developing teacher leaders (Moller & Pankake, 2006).

For this study, the researcher focused on one of the formal roles of teacher leadership which is that of an instructional coach.  According to Knight (2005), an instructional coach helps teachers by providing on-site professional development to address the needs of teachers and improve their instructional practices.  Instructional coaches are skilled in different areas, and not

solely in one specific discipline (Knight, 2007). Coaches in Alabama became a part of a state-wide K–12 initiative in 1998 in order to support over 100,000 students in grades three through eleven who could not read on grade level. Consequently, the Alabama Reading Initiative provided support to each elementary school in the state during 2003–2011 in the form of a dedicated position of reading coach (Alabama State Department of Education, 2013).

Albritton (2003) stated that instructional coaches have a variety of roles that vary across school districts. Some serve in split roles as reading specialists who work directly with students and also work part time with teachers. Instructional coaches also serve in multiple schools, while others are assigned to an individual school or grade level. However, instructional coaches from rural schools may encounter different challenges than coaches in urban schools. High quality professional development is not always accessible for teachers in small rural schools. Consequently, rural schools experience difficulties recruiting and retaining high quality teachers (Beesley, 2011; Reeves, 2003). Some rural schools are not adequately funded; therefore, instructional coaches may serve two schools. Urban schools are faced with challenges associated with larger student enrollment from students of low socioeconomic backgrounds (United States Department of Education, 1996).

Instructional coaches provide professional development to enhance teachers' pedagogy and skills to successfully implement best practices. Professional development is described as the following:

A process that may occur formally or informally to improve teaching and learning. The formal process includes: a conference, seminar, and workshop; however, it could also include professionals learning together as a team. Professional development can also be conducted informally with colleagues observing the work of others, conducting research,

and through independent reading.  Other names for professional development are: staff

development, in-service, training, and professional learning. (Mizell, 2010, p 5)

Researchers discovered that 90% of teachers who participated in a study on effective

professional development perceived it to be useless (Darling-Hammond, Wei, Andree,

Richardson & Orphanos, 2009).  In order for the professional development to be effective, the

training should be connected to practice, and include follow-up training over time (Archibald,

Coggshall, Croft, & Goe, 2011; Darling-Hammond et al., 2009).  Professional development

which is conducted in the form of a "one-shot" workshop does not change a teacher's

instructional practice (Yoon, Duncan, Lee, Scarloss, & Shapley, 2007).  The literature

highlighted above provided the backdrop for the study which was conducted for this dissertation.

It framed the problem addressed in this research, which was the need to understand the roles of

instructional coaches (who are formal teacher leaders) from multiple perspectives.

## Research Design, Data Collection, and Data Analysis

To conduct this research, a multiple case study approach was employed.  The three cases

were principals, instructional coaches, and teachers, and all were interviewed to ascertain their

perspectives on the roles of instructional coaches.  The researcher sent emails to principals of

purposefully selected urban and rural schools requesting their participation in the study.  The

urban and rural school districts were chosen in order to investigate whether or not there would be

differences in the roles of instructional coaches in these two contexts.  A total of six principals

were contacted, but only three principals accepted the invitation.  Four instructional coaches

received invitations, but only two agreed to participate.  Five out of the six teachers accepted the

invitation to participate in the study.  Interview protocols were created based on literature on

teacher leadership and instructional coaching, as well as professional development.  Interviews

were conducted in one rural and one urban school district which employed instructional coaches. The interviews lasted approximately one hour and they were audio taped and professionally transcribed for accuracy by Rev.com. The researcher visited each school and took field notes before interviewing the participants.

After conducting the interviews, the researcher transcribed the audiotapes precisely, and analyzed the data by utilizing a method called coding. This process included analyzing data for similarities of the information reported in the interview and compiling them into manageable segments (Schwandt, 2007). However, when conducting a cross case analysis, the researcher also looked for opposing views that were reported (Creswell, 2013; Stake, 2006). The researcher analyzed themes within and across each case. In the final step, the researcher reviewed all transcripts to ensure that primary themes and patterns corroborated with the data obtain from the interviews. This was done to establish validity of the data. Two participants received follow-up interviews to clarify the information they gave to the researcher. There were a total of ten participants who interviewed for this study.

The researcher interviewed individuals in each case, then compared them across cases, and compared rural and urban cases to look for similarities and differences. The researcher identified themes for each case to answer each sub-question. Finally, a cross-case analysis was conducted to identify cross-case themes that would describe the roles, facilitative factors and challenges of instructional coaching across all three perspectives. The findings will now be discussed.

## Discussion of Findings

In this section, the findings from the central question and sub questions will be discussed.

**The central research question for this study was:** How are the roles of instructional coaches enacted and perceived by principals, teachers, and instructional coaches?

**Sub Questions**

1) How do principals perceive the roles of instructional coaches?

2) How do instructional coaches perceive their roles?

3) How do teachers perceive the roles of instructional coaches?

4) What facilitative factors enhance the success of instructional coaches?

5) What are the challenges which impede the success of instructional coaches?

The findings which address the central research question are chiefly gleaned from sub-questions one through three, in which the perceptions of the ways the roles of the instructional coaches are enacted are gathered from principals, teachers, and the instructional coaches themselves. Therefore, the findings of the first three sub-questions across the three cases will be discussed first. The last two sub-questions were created to delve deeper into factors that enhance or impede the success of instructional coaches. Sub-questions three and four will be discussed separately, again across the three cases. Any similarities and differences that were found between the rural and urban contexts will be noted.

### Principals, Instructional Coaches, and Teachers' Perceptions of the Role of Instructional Coaches

The sub-questions (one through three) were similar, inquiring of the perceptions of each of the "cases" (principals, instructional coaches, and teachers) about the role of instructional coaches in their schools. Therefore, the cross-case findings for these three questions were

addressed as a unit.  The analysis from the findings from the sub-questions 1–3 combined,

answering "How do principals, instructional coaches, and teachers perceive the roles of

instructional coaches?" resulted in the following cross-case themes: instructional coaches

provide support, professional development, and analyze student data.  The findings revealed

similarities among principals, instructional coaches, and teachers from rural and urban school

districts.  All participants perceived the instructional coaches as people who provided support to

both teachers and principals, delivered professional development in various forms, and analyzed

student data to for principals and teachers in order to reveal information about student learning.

**Instructional Coaches Provide Support**

Participants in this study stated that instructional coaches provided support in different

ways including: modeling lessons, co-teaching lessons, finding resources (if needed), and

working with students in a small group settings.  Principal #1 stated, "She supports the teachers

by co-teaching and modeling lessons." Additionally, Instructional Coach #1 explained how the

coach found resources, and helped teachers create their lesson plans.  Teacher #2 opined, "I think

she adds to the value of teaching when she models lessons for us."  Modeling is considered a

highly effective way of helping others understand and it provides a visual representation of the

learning experience (Gulamhussein, 2013).  The roles of teacher leaders who served as

instructional coaches in this study were consistent with findings from Knight (2007) and Killion

and Harrison (2009).  Instructional coaches utilize various methods including the following:

conducting one-on-one meetings, planning collaboratively with teachers, modeling instructional

strategies, co-teaching a lesson, and observing and providing teachers with feedback (Knight,

2007).  The findings of this study confirm that instructional coaches, in both rural and urban

schools provide support to teachers in multiple ways.

**Instructional Coaches Provide Professional Development**

Principals, instructional coaches, and teachers also concluded that another role of an instructional coach is to provide professional development in order to help teachers improve their instructional practices and student achievement. Principal #2 reported, "The instructional coach recently provided extensive professional development…to help teachers increase the level of rigor in the classroom." Instructional coach #2 stated, "I also provide grade level professional development, which is specific to what each grade level needs." Sometimes teachers received professional development in small group settings. Additionally, Teacher #2 explained that her instructional coach partners with a local professor and provides training on how to implement reading strategies. This is consistent with findings from other researchers, who state that an instructional coach is one who utilizes effective teaching methodologies and provides on-site professional development training in different settings to address the needs of teachers (Denton & Hasbrouck, 2009; Knight, 2005).

In many school districts, instructional coaches provide job-embedded professional development to teachers within schools and the district. Professional development is a continuous process which is more effective when coaching is included. Joyce and Showers (2002) stated that professional development is more effective when teachers receive on-going support once they return to their classrooms to implement the new instructional practices. When teachers receive support in the form of coaching, 95% of the knowledge obtained is transferred to practice, which provides research credibility for coaching. Professional development should be connected to practice, and it must include follow-up training over a period of time in order to be effective (Archibald, et al., 2011; Darling-Hammond, et al., 2009). The findings of this

current study confirm that the role of instructional coaches as professional development providers is a significant role, as the literature states.

**Instructional Coaches Analyze Data**

The findings of this current study also revealed that instructional coaches analyze student data to help teachers determine their students' areas of strengths and weaknesses. It is important that administrators utilize student data to make curricular and personnel decisions, indicating whether what has been taught meets the needs of what students are required to learn. The instructional coaches in this study all enacted their roles of analyzing student data, as noted by the following quotes: Principal #1 stated, "They help teachers identify whether their instruction is effective based on the student's data." Instructional Coach # 1 stated, "I look at their data…and we talk and plan for individual students." Additionally, Teacher #2 stated "Each month we work with the coach to analyze data from formative assessments to determine if students are proficient." Thus, the role of the instructional coach in analyzing classroom and school-wide data generated by formative and summative assessments was confirmed as a key role in this study. Table 18 (from chapter 4) illustrates the resulting cross-case themes for research questions.

Table 18 (from Chapter 4)

*Summary of Cross-Case Themes for Research Questions 1-3: Principals, Instructional Coaches,*

*and Teachers' Perceptions*

| Themes | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Instructional coaches provide support to teachers, principals and students | They:<br><br>Provide resources and model effective teaching strategies to help teachers improve their instructional practices.<br><br>Add to the value of teaching and are considered a "support system."<br><br>Work directly with small groups of students.<br><br>Provide feedback and help teachers reflect on their instruction. | They:<br><br>Provide resources and model effective teaching strategies to help teachers improve their instructional practices.<br><br><br><br>Work directly with small groups of students.<br><br>Provide feedback and help teachers reflect on their instruction. | They:<br><br>Provide resources and model effective teaching strategies to help teachers improve their instructional practices.<br><br>Add to the value of teaching and are considered a "support system."<br><br>Work directly with small groups of students.<br><br>Provide feedback and help teachers reflect on their instruction. |
| Instructional coaches provide teachers with professional development to improve their instructional practices**.** | Therefore, they:<br><br>Conduct training sessions for teachers based on their needs.<br><br>Provide training to support school-wide initiatives. | Therefore, they:<br><br>Conduct training sessions for teachers based on their needs.<br><br>Provide training to support school-wide initiatives. | Therefore, they:<br><br>Conduct training sessions for teachers based on their needs.<br><br>Provide training to support school-wide initiatives. |
| Instructional coaches analyze students' data | Therefore, they:<br><br>Conduct data meetings throughout the year.<br><br>Help teachers determine whether students were proficient in each subject area.<br><br>Utilize data to modify instruction.<br><br>Utilize data to determine the type of professional development teachers need. | Therefore, they:<br><br>Conduct data meetings throughout the year.<br><br>Help teachers determine whether students were proficient in each subject area.<br><br>Utilize data to modify instruction.<br><br>Utilize data to determine the type of professional development teachers need. | Therefore, they:<br><br>Conduct data meetings throughout the year.<br><br>Help teachers determine whether students were proficient in each subject area.<br><br>Utilize data to modify instruction. |

**Facilitative Factors which Enhance the Success of Instructional Coaches**

The fourth research sub-question was: "What facilitative factors enhance the success of instructional coaches?" Two themes emerged from this cross-case analysis. The findings from this study revealed that instructional coaches need the principal's support, and they need to possess knowledge of content and pedagogy to enhance their success. When principals provided support, instructional coaches were more likely to succeed in their role, grow professionally, and receive the training needed to support teachers more effectively.

Some of the participants were not specific as to the type of support principals needed to provide instructional coaches. Principal #2 suggested in a general way that support was "the number one thing you can give a person." However, Instructional Coach #1 pointed out that a specific way that her elementary principal supports her is by attending professional development sessions with her. She also talked about how important, in general, it was for principals to attend the training with coaches to learn more about their roles. However, this instructional coach served a rural school district and was split between an elementary and a middle school. The middle school principal was also invited to attend the sessions but he did not attend any of them. The instructional coach was frustrated because she thought it would have benefitted him to attend because he did not understand her roles.

Instructional Coach #2 from the urban school stated that her principal supports her allowing her to arrange for professional outside of the school district to assist the teachers if needed. "My principal agreed to it and offered to pay the teachers for attending the sessions." Additionally, Teacher #1 who is from the same school opined, "Our principal looks for people with strong qualities…He provides opportunities for teachers to present professional development so they can step out of their comfort zone." These statements point out that

principal support is inconsistent or vague in some settings, and confirms what researchers have

suggested, and that is that few who are given the role of instructional coach receive adequate

support or training (Hasbrouck & Denton, 2005).

Principals may not be cognizant of how to best support instructional coaches although

they serve schools across the country.  However, Heineke and Polnick (2013) provided five ways

principals can support coaches in their efforts to improve teaching and learning.  1) define the

coach's role; 2) publicize the coach's role; 3) guard the coach's role; 4) facilitate collaboration;

5) hire prepared instructional coaches.

**Define the coach's role.**  The instructional coaches' role has not been clearly defined.

Administrators and coaches work collaboratively to clearly define the role of the coach is step to

meeting professional goals and supporting instructional coaches.  (Heineke & Polnick, 2013;

Knight, 2011; Shanklin, 2007).

**Publicize the coach's role.**  It is important for administrators to ensure the parameters of

the instructional coach's role are clearly articulated to the faculty.  Periodically, instructional

coaches are consumed with performing clerical duties (Borman & Feger, 2006; York-Barr &

Duke, 2004) which can be avoided if the principal "clearly defines, publicizes, and frequently

recognizes the coach's role, responsibilities, and work" (Heineke & Polnick, 2013, p. 50).

**Guard the coach's role.**  Instructional coaches should not be viewed as a staff evaluator.

In order for instructional coaches to succeed in their role, coaching relationships with teacher

must be safe, confidential, and non-evaluative (Burkins, 2007; Dozier, 2006).  Teacher should

have opportunities to share their professional needs with the instructional coach in a confidential

manner without administrators being involved.  Additionally, principals need to ensure that

instructional coaches know they are not evaluators (Heineke & Polnick, 2013).

**Facilitate collaboration.**  In order for instructional coaching to effective, administrators must create a school culture that is conducive to adult learning and values inquiry (Steckel, 2009).  Principals should establish a timeframe for instructional coaches to meet with different grade-level or with teams of teachers who are departmentalized (Heineke & Polnick, 2013).

**Hire prepared coaches.**  Finally, principals provide support by hiring prepared instructional coaches who are prepared for the job.  Heineke and Polnick (2013) believe instructional coaches need to possess content expertise in the area in which they are coaching teachers (Kowal & Steiner, 2007), and possess the following skills in order to effectively coach teachers: leadership skills, coaching skills, and interpersonal skills (Center for Strengthening the Teaching Profession, 2009; Neufeld & Roper, 2003).

The second theme which emerged from this cross-case analysis was instructional coaches should possess knowledge of content and pedagogy in order to successfully coach teachers. Some instructional coaches across the state served teachers in their district from grades K-12. Principals who participated in this study acknowledged the importance of instructional coaches obtaining requisite skills to effectively coach teachers in the specific content area they were teaching.  Principal #1 stated, "They need a good understanding of the reading interferences in order to help the teacher diagnose the problem and provide appropriate instruction."  The principal from the middle school discussed the importance of hiring instructional coaches with credentials to assist secondary teachers.  Her instructional coach served an elementary and middle school, but her educational background was in Elementary Education.  Teacher #2 believed instructional coaches "Need to be well rounded because they have to help kindergarten teachers today and fifth grade teachers the next day."  Additionally, Teacher #5 shared the same beliefs as her colleague. Table 23 illustrates the cross-case themes: 'Principals Provide Support'

and Instructional Coaches have 'Knowledge of Content and Pedagogy' for Research Question 4:

Facilitating Factors for Success with illustrative comments on how support is provided.

Table 19 (from Chapter 4)

*Summary of Cross-Case Themes for Research Question #4: Principals Provide Support and*

*Instructional Coaches have Knowledge of Content and Pedagogy as Facilitative Factors*

| Theme | Principals | Instructional Coaches | Teachers |
|---|---|---|---|
| Principals provide support to instructional coaches. | They: | They: | They: |
| | Help instructional coaches succeed in their roles. | Help instructional coaches succeed in their roles. | Help instructional coaches succeed in their roles. |
| | Help instructional coaches grow professionally. | | |
| | | Coaches receive the training they need to support teachers. | Coaches receive the training they need to support teachers. |
| Instructional coaches have knowledge of content and pedagogy. | Coaches assist teachers in all content areas to help improve their instructional practices. | Coaches assist teachers in all content areas to help improve their instructional practices. | Coaches assist teachers in all content areas to help improve their instructional practices. |

## Challenges which Impede the Success of Instructional Coaches

The fifth sub-question of this study was: What are the challenges which impede the

success of instructional coaches?  All three groups of participants stated that not having adequate

time, teacher resistance where challenges.  Additionally, two groups perceived role ambiguity as

a challenge for instructional coaches.  Instructional coaches needed sufficient time to work

collaboratively with teachers through a coaching cycle which served as a continuum for on-going

professional development.  Some teachers may not need to complete the full cycle, but many

others do.  The Alabama State Department of Education (2013) provides a description of a coaching cycle which includes the following components after student data is reviewed: pre-planning, planning with the teacher, modeling for the teacher, side-by side practice, teacher practice, reflecting, and debriefing.  It takes considerable time for an instructional coach to facilitate the entire coaching cycle with a teacher, and when there are many teachers who need the coaching, the job can seem overwhelming.

**Coaches Lack Adequate Time for the Demands of the Role**

One of the themes which emerged from interviewing the participants was that instructional coaches did not have adequate time to successfully fulfill their obligations.  All of the findings from principals, instructional coaches, and four of the five teachers had the same perceptions relating to the challenges instructional coaches face.  Principal #1 from Farm Elementary School (pseudonym) stated, "She is not here enough to follow through with her role."  Instructional Coach #1 served at the same elementary school as the principal two days per week and at Stem Middle School (pseudonym) for three days per week.  She was frustrated because of the lack of time that she had to work with students and teachers at the elementary school.  She started each morning at the elementary school to help a group of English Language Learners for about thirty minutes, although she did not remain there for the whole day.  This elementary school had twelve teachers and approximately 150 students.  However, Instructional Coach #2 served an urban elementary school with forty teachers and 800 students and stated, "I do not have enough time to help everyone."  They also had a math and science coach, reading coach, and a technology coach.  The findings from this research question confirmed what previous researchers have found: that not having sufficient time to collaborate with teachers was

a challenge for teacher leaders (Johnson & Donaldson, 2007; Natale et al., 2013; York-Barr & Duke, 2004).

**Instructional Coaches Encounter Teacher Resistance**

The participants also concluded that teacher resistance was a challenge for the instructional coaches. Teachers resisted changing their instructional practices for different reasons; however, the instructional coach who served two rural schools experienced it more with the middle school teachers. Some of them resisted making changes because the coach was certified in the area of elementary education (K–6), and the middle school served grades six through eight. Teacher #5 from the rural school gave an example of what she heard other teachers say about her the instructional coach. "How does she know what I need? Her background is in elementary education." One of the principals believed teachers resisted because "They did not want help, or they did not realize they needed help." The instructional coach from the urban school experienced teacher resistance because some teachers thought she was there to evaluate their work. Additionally, Teacher #1 from the urban school stated, "There are teachers who struggle in their content area, but will not seek additional help." Knight (2011) has pointed out that teachers must first "enroll" in the coaching process by forming a partnership which is established on the coach's credibility. The instructional coaches need the support of the principal in establishing their credibility. Researchers have concluded that teacher resistance is a common challenge for teacher leaders who are trying to be a part of the instructional improvement process in a school (Richard, 2003).

**Role Ambiguity is a Challenge for Instructional Coaches**

Another challenge that impeded the success of instructional coaches' roles was role ambiguity. In some schools, instructional coaches participated in walk-throughs or instructional

rounds with administrators.  The purpose of the instructional rounds was to observe teaching and learning then provide feedback to teachers in order for them to improve their instructional practices.  Periodically, principals recommend instructional coaches provide support to teachers in specific areas identified during the instructional rounds.  Consequently, teachers sometimes are confused about the coach's role.  They resist working with the instructional coach because they were viewed as evaluators because they work collaboratively with principals in conducting instructional rounds.  Instructional Coach #2 participated in instructional rounds with the leadership team.  She explained, "I have to deal with teachers thinking that I was there to critique their work and evaluate them."  Additionally, Teacher #2 who is from the same school stated, "I really do not think the instructional rounds are effective anyway because there are too many people coming in to observe one person, and it is intimidating."  The leadership team at the urban school conducts the instructional rounds which includes the following staff members: the assistant principal, instructional coach, reading coach, and the counselor.  The rural schools refer to formal classroom observations as "walk-throughs" and the team is comprised of the instructional coach, administrator, and one or more lead teachers.  There is another group which conducts walk-throughs for Continuous Improvement Plan.  That team is comprised of an instructional coach, school administrator, district administrator, board members, and community stakeholders, and high school students.

Teachers from the rural elementary school utilized the instructional coach to perform clerical duties which were not consistent with the role of the instructional coach.  Additionally, principals, and teachers believed instructional coaches received duties that did not involve improving teaching and learning.  Researchers believed one of the challenges which impedes the success of teacher leaders was being consumed with clerical duties (Borman & Feger, 2006;

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York-Barr & Duke, 2004), and role ambiguity (Johnson & Donaldson, 2007; York-Barr & Duke, 2004).

## Interpretations of Findings

The researcher began conducting this study with first-hand knowledge of the roles of instructional coaches because she has served in that capacity for almost three years. There is a thin body of research that has been reported on instructional coaching; therefore, the researcher was interested in learning how principals, instructional coaches, and teachers perceived the coaches' roles. She could relate to how the participants felt when they discussed the role, challenges, and facilitative factors of instructional coaches because she has either experienced them personally, and/or the research literature supported the findings. The researcher believed that instructional coaches play a vital role in helping schools improve teaching and learning. However, she was also cognizant that instructional coaches were more successful under certain conditions, which included the following: they possessed strong interpersonal skills, had knowledge of the content they were coaching, had clearly defined roles, and enjoyed support from their principals. The findings of this study of principals, instructional coaches, and teachers' perceptions of the role and the facilitators and challenges of the role confirmed her beliefs and assumptions in a clear and strong manner.

The researcher reflected throughout the study to gain an in-depth understanding of the roles of instructional coaches in rural and urban schools, and what factors enhanced or impeded their success. One of the "a-ha" moments was …It appeared that the participants were not aware of the coach's job description created by the Alabama Reading Initiative which described the expectations they have for coaches. However, the state allowed each local education agency (LEA) flexibility in order to improve teaching and learning. The document provided examples

of how schools could utilize coaches throughout the school district to meet the greatest needs. It explained that many of the Alabama Reading Initiative coaches were skilled in coaching K-3 reading; however, if administrators choose to use them in expanded roles, they will need additional support in order to coach effectively across grade levels and content areas (Alabama Department of Education, 2013). The researcher assumed the rural districts utilized the flexibility granted from the Alabama Reading Initiative; however, the findings revealed that the instructional coach's roles had expanded beyond K-3, and Instructional Coach #1 lacked the training and content knowledge to successfully coach in the middle school setting. The instructional coach who served the rural schools stated, "It worries me because I want to be honest with the [middle school] math teachers and say I do not know the content." She also explained that coaching at the secondary level was her biggest challenge. "I cannot do the math because all of the math I took in college was associated with elementary." She also expressed her concerns about not knowing the other content areas of seventh and eighth grades. One of the facilitative factors revealed by former research is that instructional coaches need to possess knowledge of content and pedagogy in the area they are coaching (Borman & Feger, 2006; Center for Strengthening the Teaching Profession [CSTP], 2009; Denton & Hasbrough, 2009; Killion & Harrison, 2005). Thus, this rural instructional coach was justified in her frustration about not knowing the middle school curriculum.

The researcher had another "a-ha" moment when she interviewed the rural middle school principal. The principal expressed her concerns about instructional coaches not knowing their roles, and she thought it was important for them to have a "game plan." She compared instructional coaches to football coaches who must possess a wide repertoire of skills specific to the area they are coaching in order for the team to be successful. She also stated that the

Alabama Department of Education had not provided clear guidelines on the roles of instructional coaches. The researcher concurred with the principal to a certain degree. In the job description for instructional coaches that is posted on the Alabama State Department of Education's website, local education agencies are given a few general guidelines for hiring coaches and the coaches' responsibilities. Veteran instructional coaches received training periodically by the state's regional coaches and additional training for new coaches is held throughout the school year. Unfortunately, principals usually were not afforded the same opportunities to learn about the roles, challenges, and facilitative factors of instructional coaching through professional development and book studies. Therefore, instructional coaches received training to help them become successful, but without the support from administrators and local education agencies, instructional coaches may be perceived as if they do not have a "game plan."

The researcher believes administrators first must have a game plan based on the needs of the school, and they should articulate the plan with the instructional coach in a collaborative manner. Principals are aware that instructional coaches have a specific set of skills to help improve teaching. However, the principals should create a school culture that is conducive for instructional coaching to be effective (Killion & Harrison, 2005). They need to assist instructional coaches in forming partnerships with teachers to ensure confidentiality, and ensure that instructional coaches are not viewed as evaluators. The researcher agrees that instructional coaches need to have a "game plan," but it should not be left up to them to create the plan, but to create the plan with the principal, who, in turn, will communicate his or her support of the plan with teachers in the schools.

The researcher was amazed to discover only one participant out of nine seemed to be aware of the job description for instructional coaches. Although they did not have a hard copy,

the researcher thought they should have known that it is posted on the state department's website, although it was not posted on the two districts' websites. The principal from the urban school knew about it, but he explained that he had the flexibility to assign the roles for the instructional coach. He also had three other content specific coaches at his school, and their roles were not clearly defined either. The researcher was confused when she discovered there were four coaches at this school, because according to the instructional coach and the teachers, she still did not have adequate time to coach teachers.

All participants agreed that instructional coaches did not have adequate time to work with teachers on improving teaching and learning; however, this challenge was enacted differently between the urban and rural districts. The instructional coaches who served the rural district the southeastern area of the state served more than one school. Some of them served two elementary schools, but other instructional coaches served a middle and a high school. The instructional coach who was interviewed from the rural district served two schools; consequently, she was not able to spend an adequate amount of time supporting teachers and assisting with school improvement plans. Therefore, the researcher assumed that because the rural schools had less funding to receive additional resources in the form of more instructional coaches, less time was spent on improving teaching and learning. Unfortunately, instructional coaching may be less effective in small rural schools than in urban schools. If this is true, then the rural locale or context could be considered a challenge impeding the success of instructional coaches. However, the time challenge was also noted in the urban district which had many more resources. The instructional coach from the urban district served forty teachers from one school with 800 students. She stated, "I do not have enough time to help everyone." The teachers from

her school also concluded, "She does not have adequate time to help teachers because their needs are so different and there are so many teachers to assist."

The researcher observed an abundance of resources and teaching materials at the urban school, and scarce resources at the rural schools.  At Successful Elementary School (pseudonym) in the urban district, she observed many artifacts from students' work samples and paintings displayed on the wall, murals throughout the school, a production room to film the morning announcements, and anchor charts  displayed in every classroom to help students remember the skills they were previously taught.  Successful Elementary School had many resources to help teachers and students which included the following: an instructional coach, reading coach, math and science coach, and technology coach.  They also had a teacher to tutor students in reading, a parent and community volunteers were reading with students in their classroom and in the library.  The teachers and the instructional coach believed the major challenge for the coach was not having sufficient time to work with teachers to improve teaching and learning.  However, the researcher observed less resources in the rural schools.  The instructional coach shared an office with the special education teacher.  The instructional coach stated that parents were not as actively involved as they should be.  The researcher did not observe parents or volunteers working with students in the rural elementary and middle schools.  The researcher concluded that context matters when it relates to the roles, challenges and facilitative factors of instructional coaches.

### Returning to the Conceptual Framework: Teacher Leadership

The conceptual framework for this study was teacher leadership.  Instructional coaching is considered one of the formal roles of teacher leadership which served as the focus for the study.  There are facilitative factors and challenges associated with the roles of instructional

coaching. Originally, the researcher was expecting to discover the following facilitative factors would enhance the instructional coach's success: acquire strong interpersonal skills (CSTP, 2009; Neufeld & Roper, 2003), having clearly defined roles (Knight, 2011; Shanklin, 2007), the school's culture (Killion & Harrison, 2005), and support from the principal (Heineke & Polnick, 2013). All principals who were interviewed perceived the school's culture, and having roles clearly defined as factors which enhanced instructional coaches' success. Instructional coaches believed being a continuous learner helped them to succeed in their roles. Instructional Coach #1 explained how she conducts her own research to learn new information instead of waiting to receive training for the administrators. She also attends training outside of the school district to enhance her professional growth. Additionally, teachers thought instructional coaches needed good interpersonal skills, and knowledge of the content in which they coached. One teacher explained how instructional coaches need to good communication skills in order to articulate their thoughts and ideas to teachers especially when they provide professional development. Teachers thought it was important for instructional coaches to work well with teachers and have a good understanding of the content knowledge in which they are coaching. The major challenge was for the instructional coach to assist teachers in the middle school because they assumed she did not understand the secondary content areas. The instructional coach from the rural school district admitted to not having the math content knowledge to assist the middle school teachers. These findings confirmed what the literature states about facilitative factors and challenges which are associated with instructional coaching. The findings confirmed what the literature stated about the importance of principal support to assist teacher leaders. However principals support teacher leaders by ensuring that coaches receive professional development to improve

their knowledge and skills (Kowal & Steiner, 2007), and they establish a school culture that promotes teacher leadership (Killion & Harrison, 2005).

The following were challenges from the literature which impede the success of teacher leaders: role ambiguity (Johnson & Donaldson, 2007; Natale et al., 2013; York-Barr & Duke, 2004), not having adequate time to collaborate with teachers (Johnson & Donaldson, 2007; Natale et al., 2013; York-Barr & Duke, 2004) lack of training (Natale et al., 2013), being consumed with clerical duties (Borman & Feger, 2006; York-Barr & Duke, 2004), and teachers being resistant to change (Richard, 2003). The findings from the study confirmed what the literature states about the following facilitative factors which enhance the roles of instructional coaches: having principal support, knowledge of content, clearly defined roles, and possessing strong interpersonal skills. Additionally, the findings also supported the literature relating to the challenges instructional coaches face which includes: not have adequate time to support teachers, teacher resistance to change, and role ambiguity. The revised framework created in Figure 3 provides a visual representation of the findings from this study which aligned with the research literature. They are in bold print. They indicate the facilitative factors and challenges which impede the success of instructional coaches' roles.

# Opposing Forces

**Facilitative Factors of Instructional Coaches' Roles**

**Challenges of Instructional Coaches' Roles**

Knowledge of Content & Pedagogy

Lack of Time

*Being a Continuous Learner*

Teacher Resistance

Strong Inter-Personal Skills

Role Ambiguity

**Revised**

**Conceptual Framework**

Teacher Leadership

(Instructional Coaching)

Clearly Defined Roles

School's Climate

Receive Training & Support

*Clerical Work*

Empower Colleagues

*Lack of Support*

School's Culture

Lack of Content Knowledge

*Figure 3. Revised Conceptual Framework*

Figure 4 depicts the finding from the study on the role, facilitative factors, and challenges impeding the success of instructional coaches in rural and urban school districts. The top half of the figure illustrates the roles of classroom teachers and administrators, and in the middle it shows how their roles are similar.  Instructional coaches can be described as hybrids because there were once classroom teachers but they continue serving somewhat as a classroom teacher by teaching students (in small groups), analyzing data, and they receive professional development.  Additionally, they serve in a leadership role because they now taking on more leadership roles by analyzing school-wide data, and provide professional development for teachers.  They provide the most support to teachers by modeling lessons, serving as mentors to improve teaching and learning.

**Teacher's Roles**

Teach students

Analyze students' data

Create Lesson Plans

Receive Professional Development

**Instructional Coaches' Overlapping Roles**

Observe teachers

Mentor

Analyze data

Help teachers create & modify lesson plans

Provide Professional Development

**Leader's Roles**

Make personnel decisions

Analyze school-wide data

Create school-wide plans

Evaluate teachers

Provide Professional Development

**Facilitative Factors**

Clearly defined roles

Knowledge of content

School's Culture

Support of Principal

Continuous Learner

**Instructional Coaching**

**Challenges**

Lack of Time
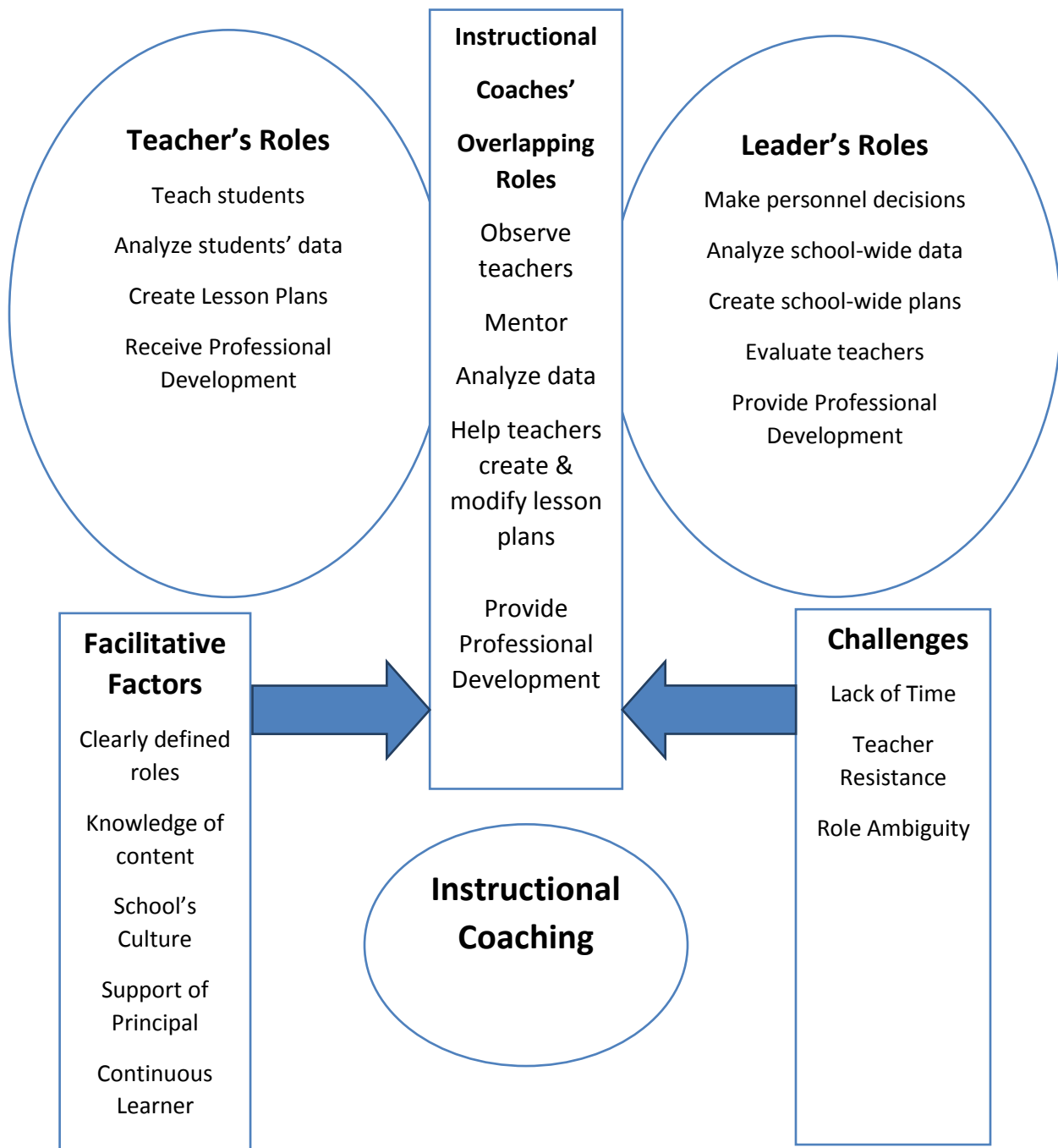
Teacher Resistance

Role Ambiguity

*Figure 4: Instructional Coaches as Teacher Leaders*

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**Limitations of the Study**

The researcher attempted to make contributions to an area of educational leadership that only has a thin body of research, that being the role of instructional coaches. However, there were limitations to the study. The researcher only obtained perceptions of a select group of participants who agreed to participate in the study. Therefore, the data relating to this study cannot be used to generalize the perspectives of all principals, instructional coaches, and teachers, because it only represents the perceptions of the ones who participated in the interviews. The researcher only included one school from an urban school district. Only an elementary and middle school from the rural district participated because they shared an instructional coach. This study showed a snapshot of the roles, challenges, and facilitative factors of instructional coaches in rural and urban schools. A much larger sample would be needed in replicating this study in order to make more sweeping generalizations on the roles, facilitating factors, and challenges of instructional coaches in K–12 schools.

**Implications and Recommendations for Practice**

As the researcher analyzed the data from this study, several implications on how others could use this research came to mind. There are implications for teacher and leader preparation programs, for school and district leaders, and for instructional coaches themselves. There are even implications for state-level decision-makers who train and support instructional coaches. The Alabama Department of Education should provide explicit guidelines to ensure that administrators are not allowing instructional coaches to provide summative evaluations when they are supporting teachers. The administrator is the evaluator, and the instructional coach provides support to improve teaching and learning. Therefore, it is important in articulating to local educational agencies the importance of clarifying the instructional coaches' roles to help

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avoid mistrust between teachers and instructional coaches.  The Alabama Department of

Education should also re-evaluate how funds are spent to hire and support instructional coaches.

If instructional coaches do not have adequate time to support teachers, the coaching program

may need to be restructured.

**Implications for Teacher and Leader Preparation Programs**

Teacher preparation programs may reap benefits by using the findings in this study and

examining how they are preparing teachers to become teacher leaders in their buildings.  It is

important that teacher leaders are afforded opportunities to acquire strong interpersonal skills,

knowledge of content and pedagogy, and other skills that are essential when working with adult

learners.  They need support to acquire these skills, and faculty in teacher preparation programs

should convey to teacher candidates that they will need to be proactive in seeking opportunities

to develop these attributes in themselves.  Many universities are offering Master's Degree

programs in Teacher Leadership, which attract teachers who want to be leaders, but who want to

lead from the classroom instead of being building administrators.  This is a very viable path for

teachers to enter a more formal leadership position, such as instructional coach.

There are also implications for Educational Leadership programs that prepare school

administrators.  The formal position of instructional coach is a relatively new position in schools,

and this study revealed that principals may not clearly know the best way to utilize the coach.

Some principals may view the instructional coach as a quasi-administrator, who participates in

evaluating instruction in the building.  Others may under-utilize the coach's instructional

expertise and assign more managerial duties.  Some principals assign instructional coaches to

work with groups of students to boost their achievement, and others designate the coach as a

supporter of adult learning, working with teachers only to improve instructional practices.

Educational Leadership program faculty should emphasize to aspiring and practicing school leaders that they must clearly define the role of the instructional coach, communicate it clearly to the teachers, and support the coach in that defined role. In the state of Alabama, where this study was conducted, the principals have flexibility in how they utilize the instructional coaches, so it will be important for administrators to know this, and thoughtfully articulate the instructional coach's role so that it will best serve both students and teachers. Educational Leadership faculty could include principals and their instructional coaches as guest panelists in courses pertaining to supervision and curriculum, as well as those dealing with data-driven decision-making.

**Implications for School and District Administrators**

The results from this study will enhance administrators' knowledge pertaining to the importance of establishing a clear job description for instructional coaches. The effectiveness of a district's instructional coaches could be enhanced if the job descriptions were established at the district level so that there is uniformity and consistency in the role enactment at the building level. The roles of instructional coaches should be clearly articulated to administrators who supervise them, and to classroom teachers to avoid role ambiguity (which was found in this study to be a barrier to instructional coaches). Administrators should communicate to all stakeholders that instructional coaches are not evaluators; therefore, they should use caution when instructional coaches are included on "walk-throughs" or "instructional rounds." Instructional coaches often deliver professional development in various forms, so they can be viewed as quasi-administrators in that capacity, as well. In the findings of this study, some teachers viewed instructional coaches as mentors and as a system of support, and perceived instructional coaching as a benefit because coaches "add to the value of teaching." However, one teacher viewed the

instructional rounds, in which instructional coaches participated, as "intimidating." Therefore, administrators should clarify the answers to the following questions:

- Should instructional coaches be a part of the "instructional rounds" along with administrators?

- If administrators serve as evaluators, then what is the role of an instructional coach if they are both observing classroom teachers together?

- Is the professional development selected to support teachers or instructional coaches connected to practice, continuous, and high quality?

- If a school has an instructional coach, reading coach, math and science, and technology coach how do their roles differ and are they clearly defined?

Although the Alabama Reading Initiative gives local education agencies the flexibility to decide how instructional coaches would be utilized in each district, administrators should consider the instructional coach's content knowledge when using elementary instructional coaches to serve in middle and high schools (which was the situation in one of the participating districts in this study). Elementary instructional coaches may have a thorough understanding of how to incorporate different teaching strategies, but not necessarily how to teach the specific content area. Thus, administrators should consider the following:

- Instructional coaches are usually chosen because they were successful classroom teachers, but would they have been as successful teaching in a different area in which they were not certified to teach?

- Since instructional coaches are evaluated by the principal or assistant principal, the evaluation should match the roles and responsibilities of the job description for the instructional coach.

Administrators should support instructional coaches, which includes providing professional development, and creating a positive school culture to help coaches build a partnership with teachers.  Additionally, there are challenges and facilitative factors associated with instructional coaching.  The findings from this study confirmed what the literature states were facilitative factors which enhances the instructional coach's roles: having clearly defined roles, good interpersonal skills, knowledge of content and pedagogy, support of the principals, and being a continuous learner.  However, there are challenges which impede the instructional coaches' success which includes: not having adequate time to support teachers, teachers resisting change, and role ambiguity.  These are important factors administrators should consider when utilizing instructional coaches to improve teaching in learning in their schools.

**Implications for Instructional Coaches**

There are many implications of this study for instructional coaches. If instructional coaches read of the perceptions that others have of their role, as outlined in this study, they will see that there are both similar and dissimilar perceptions of their role.  The one perception that was found to be consistent in this study was that instructional coaches are considered to be a significant support to both teachers and administrators in helping to improve teaching and learning in the school.  This is good news for coaches.  They are viewed as adding value to schools.  However, they need to be aware that there are factors which enhance and inhibit their effectiveness.  The context in which they work has a great deal of significance in these regards.  Principals have flexibility in how they choose to use an instructional coach, and the coach may not have input as well.  Instructional coaches, can, however, insist that they not be a part of evaluating teachers to the principal, as this can be counter-productive in their efforts to build trust with teachers.  They can assist the principal in evaluating student data, and help make

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recommendations for where assistance needs to be best applied, based on the data, but if they begin reporting their assessments of teacher effectiveness to the principal, they may soon find that teachers are more resistant to their presence in the classroom.

The literature review and findings of this study confirmed that instructional coaches serve as professional developers. However, professional development may not be effective if instructional coaching is not incorporated over time with the new learning experience that teachers received. Instructional coaches assist principals in selecting high quality professional development to improve teaching and learning, and they can advocate for the ongoing follow-up to the targeted professional development which they are able to provide the teachers.

## Overall Significance

This study will contribute to an emerging body of literature because there is only a thin body of research on instructional coaching. These findings can be beneficial to the following groups: the state department of education, leadership preparation programs, school and district administrators, instructional coaches, and teachers in different ways. An instructional coach is a formal teacher leadership role which is supported by the literature. There are facilitative factors and challenges which are associated with the instructional coach's roles. The principals, instructional coaches, and teachers in this study perceived the instructional coaches' roles to be the following: supports teachers and principals, analyzes students' data, and provides professional development to teachers. Former research literature supports these findings. Additionally, the facilitative factors from the literature and the findings include the following about instructional coaches: they should possess knowledge of content and pedagogy, their roles should be clearly defined, they should possess good interpersonal skills, they should have the support of principals, and they should be continuous learners themselves. However, when the

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researcher conducted the cross-case analysis in this study, the facilitative factors that were similar to those specified in research literature was that principals provide support to instructional coaches, and instructional coaches need to possess knowledge of content and pedagogy in order to be successful. The challenges which impede the instructional coach's success as identified in the research literature and supported by the findings of this study include the following: coaches do not have sufficient time to provide support, teachers are sometimes resistant to change their instructional practices, and there is often ambiguity about the coach's role.

## Recommendations for Further Research

The researcher sheds light on the roles of instructional coaches in elementary schools, as well as the facilitating factors and challenges they encounter in enacting their roles through this multiple case study. The perspectives of principals, teachers, and the instructional coaches were gathered in both an urban and rural schools. Limitations of the study were acknowledged above, which infer that further research needs to be conducted. This research could be replicated and include many more rural and urban schools to see if the findings would be consistent with the findings in this study. This would help researchers identify whether or not the context of the school (student demographics, resource support, district job descriptions, etc.) was a major or minor influence over the role of the instructional coach. An experimental study should be conducted to determine whether the instructional coaches' skills correlate with the success of the teachers whom they support.

One of the unifying roles of instructional coaches, as indicated in this study, was that instructional coaches provide support to both principals and teachers. However, the results were rather shallow when it came to identifying the *ways* that principals support the instructional

coaches.  It is suggested, therefore, that further research be conducted with a greater number of

principals and instructional coaches to gain deeper insight into the specific ways that principals

support coaches at the building level.  Another interesting study would be to poll the leaders of

every school district in the state to identify the various ways that districts are using the

"flexibility clause" in the instructional coaches' job description.  One additional study suggestion

would be the polling of professors of Educational Leadership in the state to determine the extent

to which they include content relevant to the role of instructional coaches as it relates to school

improvement in their courses.

## Conclusion

The role of instructional coach is a relatively new formal teacher leadership role, thus it

has been under-researched.  It is important to understand the role of instructional coaches

because, in the state in which this study was conducted, the instructional coach position is an

interim step between teaching in the classroom and assuming a building administrator position.

The instructional coach is in a unique role to develop more formal building leadership skills, and

it is important that the coach is supported in acquiring those. In this study, the role of the

instructional coach was illuminated from the three perspectives: principals, teachers, and

instructional coaches.  The researcher believes the findings provided a deeper understanding of

the methods instructional coaches utilized to enact their roles and explored necessary changes or

actions taken to facilitate the implementation of their effective delivery in elementary and middle

schools.

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Appendix 1

IRB Informed Consent
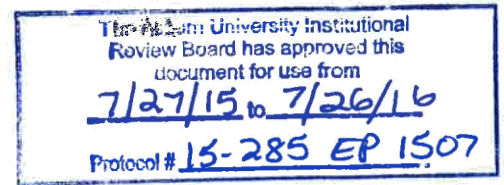
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*(NOTE: DO NOT AGREE TO PARTICIPATE UNLESS AN IRB APPROVAL STAMP WITH CURRENT DATES HAS BEEN APPLIED TO THIS DOCUMENT.*

### INFORMED CONSENT
#### for a Research Study entitled
*" The Role of Instructional Coaches: Challenges, Facilitating Factors and Benefits "*

You are invited to participate in a research study to determine the challenges, benefits, and facilitating factors in the roles of instructional coaches in elementary schools. The study is being conducted by Vanita Pharrams, under the direction of Dr. Linda Searby, Professor in the Auburn University Department of Educational Foundations, Leadership, and Technology. You were selected as a possible participant because you work in a rural or urban elementary school setting.

If you decide to participate in this research study, you will be asked to participate in an audio taped interview. Your total time commitment will be approximately one hour. Names of the participants or locations will not be identified in the study. You will not be compensated for participating in this study, and the only cost to you will be your time being interviewed.

The risks associated with participating in this study are that the interview will be recorded via audio for accuracy. To minimize these risks, the researcher will keep the audio material in a locked cabinet and transcribed data will be protected with a password. This information will destroy no later than August 30, 2016.

If you participate in this study, you can expect to explain the role of an instructional coach and the contributions to your school. I may ask you for a copy of the instructional coach's schedule if he or she is required to submit one to an administrator. I-will ask participants for permission to obtain a copy of an agenda or any other documentation that will help describe the role of instructional coaches.

If you change your mind about participating, you can withdraw at any time during the study. Your participation is completely voluntary. If you choose to withdraw, your data can be withdrawn as long as it is identifiable. Your decision about whether or not to participate or to stop participating will not jeopardize your future relations with Auburn University, the Department of Educational Foundations, Leadership, and Technology.

4036 Haley Center, Auburn, AL 36849-5221; Telephone: 334-844-4460: Fax: 334-844-3072

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Your privacy will be protected. Any information obtained in connection with this study will remain confidential. Pseudonyms will be used for any quotes from your responses in fulfillments of education requirements publications or presentations reporting this research.

If you have questions about this study, please contact me at vzp0007@auburn.edu or my advisor, Dr. Linda Searby at ljs0007@auburn.edu. A copy of this document will be given to you to keep if you are selected to participate in the interview.

If you have questions about your rights as a research participant, you may contact the Auburn University Office of Research Compliance or the Institutional Review Board by phone (334)-844-5966 or e-mail at

IRBadmin@auburn.edu <sup>or</sup> IRBChair@auburn edu.



The Auburn University Institutional Review Board has approved this document for use from
7/27/15 to 7/26/16
Protocol # 15-285 EP 1507

**HAVING READ THE INFORMATION PROVIDED, YOU MUST DECIDE WHETHER OR NOT YOU WISH TO PARTICIPATE IN THIS RESEARCH STUDY. YOUR SIGNATURE INDICATES YOUR WILLINGNESS TO PARTICIPATE.**

| | | |
|---|---|---|
| Participant's signature | Date | Investigator obtaining consent   Date |

| | |
|---|---|
| Printed Name | Printed Name |