2013

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Recommended Citation

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Abstract

This paper's thesis of human agency derived from the South Carolina Successful School Principalship Project's (SCSSPP) findings. In these schools, principals had leveraged a variety of schoolwide initiatives to enact the vision that all students would be successful despite their rurality and poverty. These findings were the underlying design for two regional cross-district pilot programs. Known as Leadership 2.0 and Leadership 3.0, the development of agency was constructed through cognitive coaching and based on principles of adult learning. Initial evaluation of participants' first year reactions show consistently high perceptions of all aspects of the principles used for their professional learning.

Keywords: agency, experienced principals, professional learning, rural school leadership

Confronting Persistent Challenges through Research-based Programming for Experienced

School Leaders

During 2011-2012, the International Successful School Principalship Project (ISSPP)

extended into the U.S. Southeast expanding into South Carolina, a state associated with the

confederacy of the Civil War. Beyond long-established issues of racial division, this state also

rates low in most educational indicators from high proportions of student and community

poverty, weak or non-existent infrastructure and capacity for serving families in poverty, and a

high degree of rurality. The purpose of the extension of the ISSPP into this state was to identify

and describe schools, if any, where students were not only academically successful despite their

community conditions, but the work of the school leadership had been sustained and clearly

contributed to improvements in school and student performance. The investigation yielded six

cases from three regions of the state and three findings that during 2012-2013, a consortium of

nine school districts and a university applied in two pilot programs to develop cross-district

capacity in increasing experienced school leaders' skill sets for school and student success. This

paper explains the application of research findings to programming for experienced school

leaders.

Perspectives

In this paper, the findings of the research study served as the perspectives for designing a

companion set of programs for the professional learning of practicing, experienced principals

and their district-level coaches. The successful school principalship project's findings offered a

structure for designing other practicing principals' professional learning and for building

capacity for continuous improvement in schools with high poverty and largely rural settings.

First, the key results from the successful schools are presented and then the ways in which those findings shaped two programs for experienced school leadership are described.

Six cases background. Three regions comprise the geo-political rural areas of South Carolina: (a) the upstate, a mountainous region, (b) the mid-state, which surrounds the state capital with multiple rural areas and very small business and industry, and (c) the coastal region. The research team used a regression model, described elsewhere (Klar & Brewer, 2013), to identify schools performing above the expected projections on state assessments, and also displayed other features of successful schools such as high satisfaction scores from teachers, students, parents and community members. The model yielded a number of potential schools at the elementary and secondary levels across the state's three regions. The team then verified case selection by contacting district administrators and investigating the degree to which the principals of those schools contributed to these indicators of school success. An elementary and middle school from each region of the state was visited for one to three days following observation and interview protocols from the ISSPP (Day, 2007).

Artifacts, observations, and transcribed interviews were analyzed through open and *in vivo* coding (Saldaña, 2009) for each school creating six individual case reports. The six reports were then compared for cross-cutting themes (Brewer, Klar, Lindle, & Knoeppel, 2012). The research project yielded findings of which three were salient for program design purposes. Included among the findings were the following:

1. Verification of *seven strong claims* about successful school leadership (Leithwood, Day, Sammons, Harris, & Hopkins, 2006).

2. Particular examples of how successful school principals exercised cultural and context-responsive leadership (Bredeson, Klar & Johansson, 2011; Johnson, 2007).

3. A sample of all six principals' policy and political agency despite conditions and policy constraints from narrow state-level regulations under the federal mandates of No Child Left Behind (Datnow, 2012; English & Papa, 2010; Hartley, 2009; Marston & McDonald, 2012; Shilling, 1992; Wohlstetter, Datnow & Park, 2008).

Each of these three findings offered a feature for use in expanding the skill sets of practicing principals in rural schools. As with many fields, the job-socialization for educators takes about five years (Ingersoll, 2001; Keltchermans & Ballet, 2002; Rots, Kelchtermans, & Aelterman, 2012). However, socialization of principals as well as their own professional learning's effects on teachers and students is understudied (Crow, 2006; Grissom & Harrington, 2010; Ingersoll & Smith, 2004). The literature does suggest that principal turnover has disruptive effects on teaching and learning, and thus, for rural schools, sustained development of principals seems to be an important feature of retaining them (Clayton, Sanzo & Myran, 2013; Duncan & Stock, 2010; Zepeda, Bengtson & Parylo, 2012). Therefore, these three findings held salience for planning professional learning for mid-career principals and their district-level mentors.

Verification of seven strong claims about successful school leadership. Leithwood, Day, Sammons, Harris, and Hopkins (2006) offered propositions from their summary of a thematic literature review of robust findings about school leadership. Their seven claims are presented in the order of variety and amount of evidence supporting each claim. For example, the authors founded the first claim on five varieties of evidence, and they based their seventh claim on a handful of citations, which, despite the sparcity, included extensive databases associated with them. The seven strong claims included the following:

1. School leadership is second only to classroom teaching as an influence on pupil learning.
2. Almost all successful leaders draw on the same repertoire of basic leadership practices.

3. The ways in which leaders apply these basic leadership practices – not the practices themselves – demonstrate responsiveness to, rather than dictation by, the contexts in which they work.
4. School leaders improve teaching and learning indirectly and most powerfully through their influence on staff motivation, commitment and working conditions.
5. School leadership has a greater influence on schools and students when it is widely distributed.
6. Some patterns of distribution are more effective than others.
7. A small handful of personal traits explains a high proportion of the variation in leadership effectiveness. (Leithwood et al., p. 3)

In the analysis of the six cases, all of these claims were substantiated, but with different emphasis than as ordered by Leithwood et al. (2006). The following two claims served as guidance for the development of professional learning for experienced leaders of high poverty rural schools:

a. The ways in which leaders apply these basic leadership practices - not the practices themselves - demonstrate responsiveness to, rather than dictation by, the contexts in which they work.

b. School leadership has a greater influence on schools and students when it is widely distributed. (Leithwood et al., 2006, p.3)

In all cases, the six principals adopted a school and community wide approach to addressing students' learning and in expanding the teachers' capacities to serve those needs. All of the principals approached and empowered their faculty and school community members in a variety of ways that suited the local morés of those rural areas (Klar & Brewer, 2013).

Particular examples of context-responsive leadership. Context-responsive leadership reveals principals as thoughtful agents in addressing both their students' needs and communities' traditions and assets (Bredeson, Klar & Johansson, 2011; Johnson, 2007). In all six schools, the principals had empowered the schools' communities to address their needs through

acknowledgement of the locales' assets as well as deficits (Brewer et al., 2012). Then, in ways

appropriate for their cultures, the principals inspired a collective response to needs by leveraging

community assets. For example, despite continually declining economic conditions, one

principal's driving questions demonstrated this inspirational approach: "Why not us? Why can't

we be the best?" (Werts et al., 2012).

The challenge for a professional learning program is to find the inspirational core within

developing leaders (Lindle, Reese, Knoeppel, Klar, & Della Sala, 2012). They need time and

cognitive as well as emotional guidance for reflective discernment in addressing community

needs with the local assets available to them (Reese, Lindle & Werts, 2013).

Six principals' policy and political agency. Despite social and economic conditions

coupled with policy constraints from narrow state-level regulations under the federal mandates of

No Child Left Behind, all six principals resisted a compliance mentality and instead, exercised

creative approaches to addressing their communities' needs by leveraging useful elements of the

policies. These approaches seemed to contradict a great deal of literature on how school leaders

are mere compliance tools in the implementation of policies (Datnow, 2012; English & Papa,

2010; Hartley, 2009; Marston & McDonald, 2012; Shilling, 1992; Wohlstetter, Datnow & Park,

2008). In an era of competing educational policy mandates emanating from the state and federal

levels, the temptation is to view principals as mere targets of initiatives (English & Papa, 2010;

Marston & McDonald, 2012; Wohlstetter et al., 2008). In contrast, the lesson from these six

principals was that a complete focus on what is good for their communities and students

supersedes the perfunctory accommodation of regulations and mandates (Brewer et al, 2012;

Klar & Brewer, 2013).

Thus, the focus for rural principals' professional learning required the empowerment of practicing principals to exercise professional judgment and a willingness to advocate on behalf of the students in their school and those students' families and communities. The potential for developing principals as advocates is an emerging focus for leadership preparation and by extension, their ongoing professional learning (e.g. Council of Chief State School Officers, 2008; National Policy Board for Educational Administration, 2011a, 2011b; Reese & Lindle, in press).

In summary, the SC Successful School Principalship Project offered substantial findings about how selected high-poverty elementary and middle school principals had successfully sustained improved teaching and learning in rural settings in a state with few policy implementation supports for high-stakes federal and state accountability mandates. These findings proved to be grounded in other literatures on developing principals' socialization and ongoing professional learning. The following results were used in developing professional learning programs for rural mid-career principals and their mentors:

- *Verifications of claims about successful school leadership*

- *Context-responsive leadership and empowerment*

- *Political and policy-relevant agency and advocacy*

Application of Research on Successful Principals to Cross-District Capacity Building

Given SCSSPP findings, Clemson University faculty extended a decade-long partnership with 10 school districts and developed two pilot programs: (a) a selected group of experienced principals from nine of districts and (b) eight selected district-level coaches to support the principals across district lines. The programs were known as Leadership 2.0, a two-year program for principals, and Leadership 3.0, a one-year program for cross-district coaches.

Experienced principals were selected from nine schools based on their early years'
success and their potential for continued development of leadership skills that support teaching
and learning. The importance of ongoing professional learning for rural principals is that unlike
the constant rotation of principals among schools in larger and more urban districts, rural
districts have fewer campuses. That is, larger districts might offer principals opportunities to
provide the same kind of leadership at multiple school sites during a career, while rural
principals need to obtain multiple skill sets over the course of a career likely located at one
school site. These principals were enrolled in a pilot program known as Leadership 2.0.

A regional, cross-district approach to leadership development was adopted because rural
district offices are often small with few leaders bearing multiple responsibilities. At times, these
district leaders may not have the matching skill sets for coaching principals in their own districts.
On the other hand, they might have the knowledge and experience necessary for coaching
principals in a neighboring district. The superintendents believed that loaning their district
leaders across district lines would have a reciprocal effect in developing capacity throughout the
region. Six of the larger districts provided eight coaches to the nine selected principals. The
coaches' pilot program was dubbed Leadership 3.0.

For Year 1, both programs met simultaneously so that some portions of the sessions
could be held together as well as providing opportunities for each group to breakout for specific
learning activities. A third group of administrators, the superintendents of the rural districts,
also, dropped in on sessions scheduled simultaneously with their consortium's monthly job-alike
meetings.

Participants met 11 times the first year, with sessions primarily focused on building
relationships and trust among participants and the university team. University team members

also made at least two visits to the nine schools so that the Leadership 2.0 principals could

introduce both the university team members and in some cases, the Leadership 3.0 coach to their

school facilities and environmental conditions. The superintendents also were included in onsite

interviews in the second part of the first year to ascertain their insights on both programs' effects

in the particular schools as well as their Leadership 3.0 coaches' ongoing learning impact on

their own districts. Leadership 3.0 participants completed their development activities in Year 1,

although they continue to attend sessions with Leadership 2.0 participants during Year 2. The

focus of Year 2 is the implementation of schoolwide improvement initiatives. In Year 3, the

university team has projected to start another Leadership 3.0 coaches' cohort, which may include

some of the Leadership 2.0 graduates. Both groups began with a gift of nine books about school

improvement and the role of school leadership, and both groups received university as well as

professional credentialing credit for their activities. Leadership 3.0 coaches received stipends,

also.

This study primarily describes the implementation of Year 1. The primary question was

to what degree were the salient findings of the SCSSPP implemented in the first year of

Leadership 2.0 and Leadership 3.0?

Data Sources

As an implementation study, the primary data sources focus on activities and

participants' reactions and attempts to make meaning of those activities (Guskey, 2003; Guskey

& Yoon, 2009). Each session ended with an Exit Survey, which was structured on adult learning

principles (Darling-Hammond, Wei, Andree, & Orphanos, 2009; Duncan-Howell, 2010; Fink &

Markholt, 2011; Guskey, 2003; Guskey & Yoon, 2009; Marzano, 2007), and modified for the

content of each session. Figure 1 displays the Learning Principles.

Research-Based Concepts for Principles	Principles Practicing principals and their mentor-coaches are …
Types of Knowledge	Principle #1: … experienced professionals with experiential knowledge and tacit knowledge as background germane to research-based knowledge.
Cognitive Demand	Principle #2: … mature learners whose ability to take abstract knowledge and apply it concretely varies individually.
Pacing	Principle #3: … busy adults with multiple responsibilities and obligations that may interrupt or intervene in learning sessions.
Context	Principle #4: … shaped by the nature of their professional roles which research has demonstrated includes high-pacing, multi-tasking, and few opportunities for sustained attention to a single issue.
Feedback	Principle #5: … highly visible and subject to spontaneous judgments as well as formative and summative evaluations of their every action.
Technology	*Principle #6 …* immersed in an information-based job, with high-levels of information demand, and constantly emerging information technologies, each with an individual learning curve.

Figure 1. Principles for Year 1 activities and content Leadership 2.0 and Leadership 3.0.

The first of the 11 sessions was held on campus in the President's Box of the football stadium, a desired destination for many of the participants and their superintendents. Sessions #2 through #5 were held as after-hours activities in conjunction with a statewide professional convention held annually in early summer. Before each of the sessions, #6 through #9, the university team used an online survey protocol to generate questions and misconceptions about prior sessions as well as to glean desires about the upcoming session's content. Figure 2 displays the content for each of the Year 1 sessions. As noted, these sessions provided some common

experiences as well as content that was specific to each program (practicing principals in

Leadership 2.0 and coaching across district lines for Leadership 3.0).

Year 1 Session #	Leadership 2.0	Leadership 3.0
1	Commencing Event	
	Principals as Learners Commitments to the 6 Learning Principles	District-level Coaches as Learners and Cross-District Commitments to the 6 Learning Principles
	What do successful SC principals do to improve and sustain high quality teaching and learning?	
2	What are the models that SC schools use to improve? What models could they use?	
3	- What data and planning strategies are available to improve schools? - What did the books you chose to read suggest about ideas for school improvement? - What data about you and your skill sets are available for helping make the steps necessary for school improvement?	
4	What does PADEPP [Note1] tell us about school leader knowledge and skills to help you take the steps necessary for school improvement?	
5	- How can you use video data to enhance your skills in taking the next steps for school improvement? - In which university degree programs might you participate to take those next steps for school improvement?	
6	Goal: Leaders in high data-use schools have clear purposes for analyzing data. They engage their staff collectively in data analysis, build internal capacity for this work, and use data to solve problems, not simply to identify them (Louis, Leithwood, Wahlstrom & Anderson, 2010, p. 179). - What are the data tools available for schools? (Halverson, 2010; Marsh, McCombs & Martorell, 2010) - What are the commitment conflicts that might hinder analysis, reflection and problem solving in schools? (Kegan & Lahey, 2001)	
7	Study Groups' discussions and planning - Learning Targets - Lexile & Quantiles - Databases	Coaching experienced leaders - Cognitive Coaching - Emotional Aspects of Policy - Asking Socratic Questions
8	Video Analysis of Instruction - 5D (Fink 2011)	
	What did I see and how would I advise teacher of next instructional steps?	- How would I coach a principal in addressing teacher strengths and improvement? - How can I frame my coaching in Socratic questions?

Year 1 Session #	Leadership 2.0	Leadership 3.0
9	**The Next Level** • What do you see as the next level for your school? • What would you like to use Leadership 2.0/3.0 to help you accomplish by May 2014? **Reaching the Next Level** • What will it take for your school to reach the next level? • Who and what do you need to get to that level? • How can your work in your study group help you reach this level? **The Next Steps** • What, specifically, do you want to accomplish by the end of the program? • What specific steps will the mentee take to accomplish this? • What specific steps will the mentor/coach take to accomplish this? • What assistance is needed from others?	Discuss the activities we have completed so far. • What was the main "take away" for you? • How can you coach the take-aways for your protégé principal and his/her school?
10	• What aspects of your professional expertise for instructional leadership can be enhanced in the next 12 months? • What focus (limited to one or two outcomes) for school improvement can you lead over the next 12 months? • What are the models for data-informed decision making that SC schools use to improve? What models could they use? • What data about you and your skill sets are available for helping achieve the steps necessary for school improvement? • How can you use video data to enhance your skills in taking the next steps for school improvement? Individual Reflection Time & Protégé/Mentor Discussion How might 5D be used to inform ways in which Leadership 2.0 professional expertise is enhanced?	• What are the models for coaching data-informed decision making to lead schools improvement? • What data about you and your skill sets are available for helping achieve the steps necessary for coaching leadership of school improvement? • How can you use video data to enhance your skills in taking the next steps for coaching leaders of school improvement?
11	Allocating Resources for Academic Improvement from CALL (Kelley & Halverson, 2012)	

Figure 2. Year 1 session topics for Leadership 2.0 and Leadership 3.0.
Note 1: PADEPP is the South Carolina Program for Assessing, Developing, and Evaluating Principal Performance.

Findings

The Exit Surveys for the sessions were built around the learning principles that formed the focus of Session #1's commitment activities for each group. The Exit Survey information was aggregated over Session #2 through #5's after-hours activities alongside the statewide annual convention. Other sessions were scattered over the next nine months of the school year, and those Exit Surveys were collected and reported by each session. Items in the Exit Surveys used a likert scale ranging from *Strongly Agree* (5) to *Strongly Disagree* (1). The following table displays the by group means and by principle results for Year 1 sessions.

Table 1

Exit Survey Results for Year 1

Session	Principle	Leadership 2.0 Mean (N ranges from 3 to 9)	Leadership 3.0 Mean (N ranges from 3 to 7)
#2 thru #5 Aggregated responses	**Types of Knowledge**	4.2	4.3
	Cognitive Demand	4.3	4.2
	Pacing	4.3	4.0
	Context	4.5	4.6
	Feedback	4.1	3.8
	Technology	4.2	4.2
#6	**Types of Knowledge**	4.1	4.1
	Cognitive Demand	4.0	4.2
	Pacing	4.2	4.3
	Context	4.7	4.4
	Feedback	4.1	4.2
	Technology	4.0	4.1

Session	Principle	Leadership 2.0 Mean (N ranges from 3 to 9)	Leadership 3.0 Mean (N ranges from 3 to 7)
# 7	Types of Knowledge	4.5	4.5
	Cognitive Demand	4.4	4.3
	Pacing	4.4	4.5
	Context	4.6	4.6
	Feedback	4.3	4.3
	Technology	4.6	4.0
# 8	Types of Knowledge	4.4	4.1
	Cognitive Demand	4.3	3.8
	Pacing	4.7	4.1
	Context	4.3	4.1
	Feedback	4.1	3.9
	Technology	4.1	3.8
# 9	Types of Knowledge	4.4	4.8
	Cognitive Demand	4.8	4.4
	Pacing	4.8	4.6
	Context	4.6	4.7
	Feedback	4.7	4.3
	Technology	3.9	4.1
#10	Types of Knowledge	4.6	4.3
	Cognitive Demand	4.3	4.2
	Pacing	4.7	4.6
	Context	4.5	4.6
	Feedback	4.0	4.6
	Technology	4.1	4.0
#11	Types of Knowledge	4.3	4.1
	Cognitive Demand	4.4	4.6
	Pacing	4.4	4.7
	Context	4.3	4.7
	Feedback	4.2	4.0
	Technology	4.0	3.9

The averages in Table 1 show a rating above or near *Agree* (4) for all six principles

across all content of the 11 Year 1 sessions. Some of the comments on the exit slips revealed

ongoing uncertainty about the expectations and purposes of the program through the 9th session.

In short, the start-up was slow for some of the participants. Some of the confusion may have

been due to uneven attendance among members of both groups.

Attendance at the Year 1 sessions varied. The university team encouraged attendance at

the sessions during the first year, but did not provide any penalties for lack of attendance. They

made this decision as a commitment to Principle #3 (Pacing):

> Practicing principals and their mentor-coaches are busy adults with multiple
> responsibilities and obligations that may interrupt or intervene in learning
> sessions.

Table 2 displays the range of attendance at sessions during the first year of the two pilot

programs.

Table 2

Attendance during Year 1 Sessions

Session #	Leadership 2.0 Attendance Average	Leadership 3.0 Attendance Average
1	67%	75%
2	100%	63%
3	100%	75%
4	100%	63%
5	89%	63%
6	100%	75%
7	78%	100%
8	78%	88%
9	89%	75%
10	78%	75%
11	67%	50%
Year 1 Average	86.00%	72.91%

Leadership 2.0 participants ranged from 64% to 100% attendance. Leadership 3.0

participants ranged from 36% to 100% attendance. Overall, the Leadership 2.0 participants

averaged 86% attendance, while the Leadership 3.0 participants made it to the sessions with a

73% attendance rate. The variance in attendance between the two groups may also reflect the

differences in each group's roles with Leadership 2.0 participants slightly more able to adapt to a

single school's schedule, whereas the Leadership 3.0 participants had to juggle scheduling across

multiple schools in their primarily district-level jobs.

The scheduling issues also infiltrated the ways that participants tried to work with each

other. Among the comments on the Exit Surveys, the prevailing request was for more time for

coaching and reflection between Leadership 2.0 principals and their matched Leadership 3.0

coaches. The coach-principal pairings crossed district lines, as well as differing districtwide

schedules. Although these districts have a long history of collaboration, they do not make

identical calendars due to the required local school board approval for each school year. The

mismatch in schedules affected when the coaches and principals contacted and met each other.

Although one pair reported extensive use of email, most of the others relied on the 11 sessions

during the first year to steal time to meet with one another.

Discussion

The first year results of these two pilot programs revealed a near-year-long period of

uncertainty for nearly all the principals. To some degree, principals (Leadership 2.0) were slower

to respond to demands that they initiate change in their schools and communities than their

coaches (Leadership 3.0). Experienced principals had some limiting notions based on their prior

success in their roles. They were reluctant to change their past practices in interventions to

improve teaching and learning. These limiting concepts ranged from merely telling teachers what

principals observed and assigning tasks in a managing manner to assumptions about how

announcing test score results would affect either teaching or learning. In other words, some of

the principals felt that teachers would see the scores and understand how to change their

practices just by looking at those data.

The coaches recognized some individual issues among the principals, and that

recognition included observations about the principals' reluctance to change or to understand

how to change their schools. Coaches deliberated about how to bring up what changes needed to

be made and had to make a shift in telling to the cognitive coaching strategy of Socratic

questioning.

The largest challenge for both groups was prioritizing time for reflection. In general, the

results raised questions about the pacing of professional learning when the objective is to

empower principals to be instructional leaders as well as political and policy advocates in the

best interests of their students and communities.

Conclusion

From a yearlong multiple case study, the SCSSPP, the following features of successful

school leadership were revealed: (a) verifications of international claims about successful school

leadership (Leithwood et al., 2006); (b) context-responsive leadership and empowerment

(Johnson, 2007); and (c) political and policy-relevant agency and advocacy (Reese & Lindle, in

press). These features were then incorporated into two pilot programs for experienced school

leadership at the building (Leadership 2.0) and district levels (Leadership 3.0). The participants

from nine school districts in a well-established partnership with a university team appreciated the

content of Year 1 programming focused on school improvement and professional learning for

leadership development. They also appreciated the coaching relationships, but struggled with

finding time for reflection. Year 2 focuses primarily on developing a single schoolwide

improvement initiative and carving out time for coaching and reflection.

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