

An Improvement Coaching Casebook and Discussion Guide: Engaging with Scenarios of Practice

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Carnegie Foundation
for the Advancement of Teaching

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More and more, educational organizations identify using “continuous improvement” practices in their efforts to tackle persistent challenges and inequitable outcomes. The language of continuous improvement is built into federal education policy and into policies at some state and local levels as well. When focused on goals to make educational systems work better for those that they serve, and in particular to address equity challenges that perpetuate unequal outcomes, using improvement science methods has the potential to powerfully transform systems. Improvement science draws on quality improvement approaches and tools used across business, industry, healthcare, and other fields that support taking a scientific approach to identifying problems and working to identify solutions. As a method for continuous improvement, it can help organizations learn both when the solution to a particular problem is not known, and when trying to effectively integrate a known solution into a particular local context.

There is increasing demand for support for improvement activities as more schools, districts, higher education institutions, and other independent education organizations seek to use quality improvement methods to discipline their efforts. As they focus on particular problems, many systems also seek to develop local improvement expertise and capacity so that as they realize progress on their improvement goals, the people in the system develop the skills and resources to take on new challenges.

Improvement coaches can be a key resource in this work.

Improvement coaches are people who can guide and support individuals, teams, and organizations to build their improvement capabilities through practice and provide external perspective on change efforts. They bring knowledge of different improvement methods and of change management to their work supporting individuals and teams who are working to transform outcomes and the systems that produce them. Improvement coaches may teach, guide, question, reflect back, facilitate, and provide critical insider-outsider perspective as they support improvement efforts.

Coaching in any field is a complex endeavor. Whether working with a teacher to develop his practice, guiding a team of athletes, or supporting an executive to refine her leadership, a coach may be called on to contribute subject matter expertise, help assess and respond to interpersonal dynamics, or be able to identify and surface how context is impacting a coachee’s work. As an emerging practice, at this point improvement coaching in education has not been extensively described or researched, and there are few formal trainings available to support improvement coaches seeking to work in education. It is this gap that motivated the creation of this casebook.

The purpose of the Casebook and potential use cases

This casebook is intended as a resource to support improvement coaches to reflect on and discuss their practice in ways that enable them to learn and to refine their skillset. It includes a set of scenarios drawn from the practice of real coaches working with improvement teams and networks in the education space. The scenarios speak to different challenges that improvement teams encounter related to specific methods of improvement, the work of organizing and leading social learning activity, and navigating the context in which an improvement effort sits.

The scenarios present complex situations through which there may be multiple, productive paths forward. In this way, the scenarios are intended to provide a starting point for analyzing the practice of coaching by providing common texts to ground discussions about the affordances and tradeoffs of different decisions and actions. They provide a context for considering alternate courses of action and imagining how a situation might play out. This guide includes a discussion protocol and related reflection sheet to facilitate coaches to identify and discuss the problems of practice presented in the scenarios, and to help individuals surface the thinking and assumptions that shape their actions.

Coaches develop their skills over time through experience and reflection, and through sharing practice with others and grappling with different ways to respond to a given situation. With growing demand for skilled coaches who can support the complex work of improvement, there is a need to support the development of individuals to take on these roles. The resources in this casebook can be used for this purpose in a number of ways. Individuals can use the guiding questions in the protocol to reflect on their own practice. Groups can engage together around a common coaching dilemma as a way to share and learn from each others' analyses. Individuals charged with coach development may employ the scenarios as a resource in their teaching. Reflecting on and analyzing the scenarios can also be a first step for a group seeking to build abilities and norms for discussing practice, with an eye towards members bringing their own dilemmas to the group for consideration and support over time.

Organization of the resources

The casebook is organized into three sections. The first section, Coaching Considerations, offers several ways to think through or analyze a situation and possible responses as a coach. These include a set of categories of core challenges that can be used to understand issues that may be present in a situation, ways to frame and understand the role and position of the coach, and questions of equity that may be present. The second section includes a discussion protocol that structures reflection on a coaching scenario using those considerations. The aligned reflection sheet in this section can be used to capture thinking as you engage with the scenarios. The third section includes the set of scenarios, each of which illustrates at least one of the core challenges.

These materials are intended to support slowing down the process of analyzing challenges in improvement coaching and identifying a coaching course of action so that diagnoses and choices can be interrogated and alternatives explored. We hope the scenarios are useful tools in developing your own practice and provide contexts for opening up coaching practice to more public examination and discussion so that our collective experience can help to develop and formalize the practice of improvement coaching.

We have used and refined the materials in this casebook with various audiences and would welcome hearing from you about how you use the casebook or how we might add to it to increase its utility.



Improvement coaches may be called on to build individual capability, to offer strategic guidance, or to generally support progress toward a team's identified improvement aim. To do this, they must respond to the current context of the individual or team they are coaching while holding larger goals in view. In reviewing the literature about coaching practice and in hearing coaches describe their work, two key considerations surfaced that inform a coach's response in a given moment: the nature of the coaching challenge and the stance of the coach in identifying the path forward. The scenarios in the third section of this casebook provide a context for analyzing those considerations. Beyond the two considerations about the nature of the challenge and coaching stance, effective coaches consider and surface issues related to their own identity and positionality in this work, as well as consider equity challenges and implications that may exist. The considerations that follow are the underpinnings of the discussion guide in Section 2.

The nature of the challenge for the team

In our effort to understand the work that improvement coaches do and utilize it to support coaching practice, we sought to identify the nature of the improvement challenge, and found Heifetz's **adaptive** or **technical** framing particularly helpful to understand a coach's actions. These descriptors, which emerged as a way to describe leadership work in Heifetz's (1994) *Leadership Without Easy Answers*, speak to the kind of capacity to be built or learning that must be undertaken in order to make progress on a problem. They explicitly capture the level of change complexity in the challenge at hand. **Technical** challenges have likely been faced and managed by someone, somewhere, in the past and can therefore be addressed by drawing on known expertise or solutions. To describe technical work, Heifetz (1994) writes:

These problems are technical in the sense that we know already how to respond to them. Often, they can only be accomplished with mastery and ingenuity. They are not easy, nor are they unimportant... These problems are technical because the necessary knowledge about them already has been digested and put in the form of a legitimized set of known organizational procedures guiding what to do and role authorizations guiding who should do it (p. 71-72).

In contrast, **adaptive** challenges require that new capacity be built to address them. To describe adaptive work, Heifetz (1994) writes:

Adaptive work consists of the learning required to address conflicts in the values people hold, or to diminish the gap between the values people stand for and the reality they face. Adaptive work requires a change in values, beliefs, or behavior. The exposure and orchestration of conflict - internal contradictions - within individuals and constituencies provide the leverage for mobilizing people to learn in new ways (p. 22).

Identifying whether a situation presents a technical or an adaptive challenge for the individual or team that is being coached can help a coach determine what action to take. To address a challenge that is purely technical, a coach may be able to suggest a particular course of action or support a coachee to access existing expertise because the problem, solution, and implementation are clear and available to all. An adaptive challenge, in which the problem, solution, and implementation all require learning, may necessitate articulating and testing competing values and perspectives, or facilitating reflection and the engagement of others in order to help identify the change that needs to be made. We do not mean to imply that a challenge must be classified discretely as either technical or adaptive; many challenges have components that can be described as technical while also having aspects that require transformation and new learning. Explicitly considering in what ways a situation presents an adaptive or technical challenge for a coachee can help a coach to make judgments about a course of action to facilitate the necessary learning.



Equity challenges

Equity challenges can present themselves in various ways as coaches consider a coaching situation. Identifying how questions of equity enter a situation, and the extent to which they are recognized or acknowledged by a group, can shape how one approaches as a coach. In some cases, there are equity challenges within the problem of practice that is the focus of improvement. However, equity challenges can also appear in how a team goes about doing its improvement work: in how the team members are organized, how ownership is shared, whose voices are heard, and whose expertise is elevated informing the work. We think of these as equity in outcomes (e.g., closing achievement gap between Black and white students) and equity in processes (e.g., the teacher's voice is silenced on the improvement team) as discussed by Hinnant-Crawford (2020). Coaches often encounter both types of equity challenges when supporting improvement teams. Working with teams to address those challenges is vital in order to realize the improved outcomes and system changes that improvers seek. Elena Aguilar's (2020) Transformational Coaching approach reminds us that there are behaviors, beliefs, and ways of being that come into play when coaching for equity.

How might my identity or position influence how I see the challenge?

In working to improve education, improvers are most often seeking to address inequities that are deeply rooted in educational systems. Coaches can be instrumental in helping individuals and teams to examine systems and take action to interrupt practices that perpetuate inequities. And, to be effective in this work, coaches must be aware of how their own identities and experiences shape their understanding. Each coach's position and perspective influences how they see and understand what the teams and individuals they are coaching are working through, and how the coach might support them forward. Taking time for self-reflection and gaining awareness of the limits of their own perspectives can help coaches to make better decisions as they work with teams and individuals.

There are frameworks that exist to support more in depth self-reflection, for example through creating and reflecting on one's social identity map (Jacobson & Mustafa, 2019). Milner's framework takes researchers through a racial and cultural awareness, consciousness, and positionality as they conduct research (Milner, 2007), and Biag (2019) offers a set of equity-related questions to consider for each stage of improvement journey. We don't mean to be exhaustive here with respect to the internal identity work a coach ought to do as a practitioner to work towards antiracist practice. Regardless of what framework one uses for reflexivity, we offer at a minimum that an effective coach reflects on how their own identity and position may impact how they see and interpret the coaching challenges that emerge with those they coach.

The coach's stance

There is no single "right" way for a coach to act in any given situation. To meet the needs of those with whom they work, coaches must continually shift and adjust in response to the thinking and feedback offered by the coachee. As they come to understand what a coachee is wrestling with, coaches make decisions about how to carry out their work, and how to position themselves in relation to the coachee, the problem, and the change process. These choices can be understood along a continuum, with a coach taking a directive role and leading the change process at one end and a coach playing a facilitative role characterized by a more co-constructed change dynamic at the other. According to Heron (1976), directive approaches may involve being prescriptive, informative or didactic, or confronting (providing direct feedback). Facilitative coaching interventions may be supportive, cathartic, or catalytic to



encourage reflection and self-directed problem solving. We recommend thinking of a coach’s stance along this continuum from directive to facilitative when considering the coaching behaviors to navigate a particular challenge, and refrain from discrete classifications. There are affordances and tradeoffs to different stances at different moments, and coaches often move back and forth on this continuum as they work. We recognize that coaching requires trust, emotional intelligence, and interpersonal awareness. Coaches might also take into account their relationship with the team or individual in order to decide how to approach their coaching moves.

Categories of improvement coaching challenges: an organizing framework

As part of an effort to understand the practice of improvement coaching, we interviewed improvement coaches at various stages of development of their practice. The stories and reflections shared by interviewees helped to identify four categories of challenges that improvement coaches encounter in their work with teams in service of meeting their aims. The categories, included below, offer a frame for identifying core coaching challenges in supporting improvement teams. For additional information about the research that led to these dimensions, see Khachatryan, Shreve, and Eckert (2023).

Category #1: Improvement Science Capability	Developing the improvement science capability (e.g., skills to design and execute cycles of inquiry) of individuals and teams.
1A - Supporting deployment of improvement tools and methods in coordinated ways	Coaching challenges related to supporting appropriate application of tools and methods to advance in the journey toward identified improvement goals.
1B - Developing inquiry capability	Coaching challenges related to supporting individuals and teams to learn from PDSA cycles, including the processes of designing, executing, documenting, and reflecting on those cycles.
1C - Developing an analytic orientation and capabilities	Coaching challenges related to supporting individuals and teams to see the importance of data in improvement, and to build analytic capability to effectively drive the improvement effort.

Category #2: Improvement as Continuous Learning	Supporting the learning journey of improvers in ways that shift current practices and ways of thinking that promote ownership of the work
2A - Fostering agency for improvement initiatives	Coaching challenges related to empowering individuals and teams to set the direction and cadence of improvement work.
2B - Managing improvement and maintaining momentum	Coaching challenges related to supporting productive processes, routines, and habits to maintain momentum in the improvement work.
2C - Supporting facilitation skill development	Coaching challenges related to supporting individuals who facilitate local improvement teams.

COACHING CONSIDERATIONS



Category #3: Coach and Team Relational Dynamics	Supporting the development of the coaching relationship with individuals and teams.
3A - Establishing and sustaining relationships	Coaching challenges related to establishing and sustaining a relationship with an improvement team and the connections among team members.
3B - Enabling equity of participation	Coaching challenges related to encouraging diverse perspectives and enabling equitable participation.
3C - Addressing unproductive interpersonal dynamics	Coaching challenges related to addressing unproductive interpersonal dynamics between coach and improvers and among improvers.

Category #4: Environmental Conditions	Fostering the enabling conditions necessary to execute and sustain the improvement work.
4A - Addressing individual beliefs	Coaching challenges related to addressing individuals' beliefs that may limit a willingness to act and undertake improvement efforts.
4B - Navigating existing organizational culture	Coaching challenges related to navigating and shifting existing organizational culture that may impede improvement work.
4C - Navigating system constraints	Coaching challenges related to the organizational structures and constraints that shape how the improvement work is done.



Discussion Protocol for Engaging with the Scenarios

This protocol provides a structure for groups of improvement coaches to explore situations that arise when teams undertake improvement work. Through analyzing the situation and considering different core challenges and possible responses with peers, coaches can consider different ways to support the improver or improvement team to move forward.

1. [1 min] Introductions

- a. Each person introduces themselves.
- b. Identify one person to keep time and keep the group moving through the protocol.

2. [5 min] Individually review the scenario

- a. Read through the scenario once, quickly, to get a sense of the situation.
- b. Re-read the scenario. Make notes for yourself about each of the group discussion questions below in preparation for the discussion.
- c. Reflect on how your own identity or position may influence how you see the challenge.

3. [15 min] Group Discussion

- a. Each person shares:
 - What is at the core of this challenge? *Refer to the categories of coaching challenge categories.*
- b. Discuss how you each categorized the dilemma, if there are differences.
 - What would you put in first position in this situation? Why?
- c. Consider equity:
 - What structures, policies, processes, or mindsets might be impacting equity in this coaching challenge?
 - How does your identity influence how you see the challenge?
- d. Discuss how you would each respond as the coach in this situation:
 - What would your goal be in coaching through this scenario?
 - What stance and tone would you take? Would you be more directive or facilitative?
 - Given your (imagined) relationship with this group, how does the relationship impact how you respond and act as their coach?

4. [4 min] Wrap Up

- a. Each person shares a key takeaway from the discussion.

5. Individual reflection

- a. Has a challenge like this presented itself in my coaching practice? What would I do in this situation?
- b. What assumptions or lenses did I bring to understanding this example? How did my identity influence how I diagnosed this situation, and the kinds of responses I considered?
- c. What have I learned about my own tendencies as a coach? Where might I want to intentionally work to expand my practice?

REFLECTION SHEET



Scenario Title:

Personal reflection:

- What is at the core of this challenge?
- What structures, policies, processes, or mindsets might be impacting equity in this coaching challenge?
- How does my identity or position influence how I see the challenge?
- What would my goal be in coaching the individual or team through this situation?
- What stance will I take in my communication?
- How does my relationship with this team (individual) shape my coaching actions?

What I'm hearing as we discuss...

After the discussion:

- Has a situation like this presented itself in my coaching practice? What would I do in this situation?
- What assumptions or lenses did I bring to understanding this example? How did my identity influence how I diagnosed this situation, and the kinds of responses I considered?
- What have I learned about my own tendencies as a coach? Where might I want to intentionally work to expand my practice?



Scenario 1: Feeling Stalled

A team of eight educators from four schools is working together to increase student academic conversation within science classes in order to strengthen students' skills with the science and engineering practices. The team has been working with the improvement coach for about six months on this effort. After investigating to understand the current state of student talk in their science classrooms and studying research in this area, the team identified several key areas of challenge that were common across their school sites. In developing a theory of improvement, members also identified two promising change ideas connected to the problem in their contexts and collaboratively planned out an initial PDSA cycle for each one.

The improvement team currently gathers every other week. At these meetings, one team member facilitates the group through a protocol to share their tests and learning. The coach attends many of the meetings to support the team as individuals build their comfort with the PDSA cycle and improvement methods. Each of the individual team members has been able to execute and document at least one PDSA test. Five of the team members have executed multiple tests, and those individuals' confidence is growing with the routine of planning, executing, documenting, and studying the results of tests, and then posing new learning questions. When the team meets, members share what they tried, loosely reference evidence from their tests when describing what they learned, and share any adjustments they intend to make before running a next test. However, after three meetings organized around this kind of sharing, the team seems to be repeating the same sharing protocol in each meeting, but not bringing together the learning from their different classrooms or identifying shared next steps to see improvement on increasing student talk. Participants privately voice that they do not feel like they are making progress as a group, and the coach perceives frustration among the team members because they don't see where their tests may lead beyond their own classrooms.

Reflecting on the work to date, the coach identifies that team members have been pursuing their testing individually after collaboratively planning the first test. Individuals report out on their work when they meet, but the learning that team members surface is not yet building towards expanding testing to more places or learning about how specific changes perform in new contexts. The team has shared with the coach that they feel stalled, and asked for guidance on how to move ahead.



Scenario 2: Leap Into Leadership

A group of four schools has formed an improvement network to tackle the problem of chronic absenteeism. The coach has been working with the network as they investigated chronic absenteeism in their systems and completed a causal system analysis. After moving through a thorough problem investigation phase as a network and developing an initial driver diagram, the sites have identified that a high-leverage starting place will be working on their routines for collecting, disseminating, and using attendance data. Each site has identified an improvement team to lead this phase of the work that is composed of teachers, attendance office staff, counselors, and an administrator. One person on each team serves as an improvement team lead, organizing and facilitating the group and working as the primary point of contact between the coach supporting the network and the site team.

As the network moves into the phase of learning through testing, the coach is working directly with each of the four improvement team leaders to support the site teams. That work includes regular check-ins with individual leads around team activities and their leadership, feedback on team agendas or co-planning for team meetings, periodically attending team meetings and facilitating communication with network leadership.

At one site, the team lead is a fourth-year teacher who is halfway through her first year of teaching at this school. She participated actively in problem identification activities through the first half of the school year, but is otherwise new to using improvement science. Her principal encouraged her to serve as the team leader because of her clear communication skills, positive disposition to the improvement work, and ability to relate well with her colleagues. However, in an email exchange with the coach to arrange a time to work on the upcoming team meeting agenda, this team lead has expressed concern about sitting in a leadership role. While she is deeply invested in the improvement work and the problem of chronic absenteeism, she is struggling to think through how to lead the team when she is relatively new to the school community and also just learning improvement methods. She is worried that she does not have the knowledge she needs to lead effectively, in part because she does not feel able to map out a clear path for the team's work through the end of the school year. She has asked for time to talk about her role with the coach when they meet to prepare for the next team meeting.

Scenario 3: Voices On a Team

A coach has been working with a seven-member improvement team over a three month period. The team meets every other week, and is focused on improving processes related to student scheduling in their high school. Team members include two academic counselors, an assistant principal, the math department chair, the fine arts department chair, the registrar and the counseling office administrative assistant. Each member was recruited to the team because of their particular perspective on the problem.

The team started its work together by discussing the importance of all team members actively participating in the work and by setting norms to support equitable participation that included “watching air time” and “stepping up” to be vocal in conversations. However, patterns have emerged where one of the counselors, who is newer to the school, and the fine arts department chair, who identifies as BIPOC (black, Indigenous, and people of color), are consistently quieter and rarely speak during team meetings. The remaining members of the team actively engage in discussion during meetings, both when they agree with each other and when they hold differing views, and demonstrate energy and excitement for the work. The math department chair in particular is passionately outspoken about where the group should head next in its work, and regularly enlists others to join him in pursuing specific lines of inquiry.

Up to this point, team members have not acknowledged the participation dynamic that is playing out. However, as the team increasingly divides up activities in their problem investigation and individuals are responsible for bringing learning and evidence back to the team, the coach recognizes that these participation dynamics have the potential to impact the team’s progress and the success of its improvement efforts. The coach wants to support the team to more effectively draw on the diverse expertise of all of the team members.



Scenario 4: We Already Understand the Problem

A middle school has embarked on a whole-school effort to improve student engagement in learning across its different subject areas. The focus on student engagement was identified by the instructional leadership team and site administration after reflecting on evidence gathered in classroom observations over the prior semester as well as indicators on a campus climate survey that students felt disconnected from their teachers and the school community. The leadership team introduced the engagement focus and the plan to use improvement science to tackle it to the staff at a professional development day at the start of the school year. At the same meeting, the staff was organized into smaller teams to begin problem investigation activities.

The school has a seasoned staff, with many teachers having taught at the school for most of their careers. Many staff are deeply invested in their particular areas of subject expertise and take pride in having refined robust units and projects through multiple years of development. Teachers are committed to providing rich and challenging learning opportunities for students, although it is not uncommon to hear teachers lamenting that students do not consistently rise to the level of challenge provided, or that students turn in work that is only partially complete.

All of the teams met briefly (for about 30 minutes) on the first professional development day. At that time, the teachers on one team expressed frustration at the engagement focus, and discussed different efforts that they have individually invested to boost student participation in their classes without seeing significant impact. They identified a number of challenges to student engagement, including the competing demands of students' lives outside of school, students' level of personal investment in learning, and students' willingness to take on challenging work. The coach happened to be observing this group, and in the teachers' comments, the coach identified a number of assumptions about students that went unchallenged, as well as significant resistance to investing effort in the improvement activity. The coach is meeting with the instructional leadership team to plan for the second meeting, at which each small team is supposed to make plans to investigate a specific question in order to better understand the obstacles to students' active engagement in learning. She recognizes that members of the staff already have strong hypotheses about what is causing the patterns of engagement they see among their students, and is considering how she might help the team expand its understanding of the problem.

Scenario 5: A Mathematics Instructional Improvement Team

The coach is working with a local school team that is part of a broader network of schools focused on improving mathematics achievement outcomes. The coach has been working with this team as well as several other teams in the network for several months, joining each team's weekly meetings once or twice a month and working with the team leaders at least once between meetings.

This local team has identified significant variation in mathematics instruction, in particular the extent to which teachers are differentiating their instruction. They hypothesize that this is one factor contributing to the variation in student outcomes they recognize across classrooms, and have decided to begin their work by focusing on improving instructional practice in the mathematics classroom. The team has used a variety of tools to understand the current state of practice in the school. As part of its problem investigation, team members worked with different teachers to map their lesson planning processes. The improvement team then met as a group with the coach to consolidate their learning from the process maps. Looking at the maps as a set revealed significant variation in planning practices between teachers that were leading to different levels of differentiation in response to student needs. Based on the maps and reflections from teachers about their processes, the team also identified a few common points where processes consistently broke down. At the end of the meeting, the team adjourned with plans to investigate effective lesson planning practices in order to identify potential change ideas.

It is now several weeks since the team examined the process maps, and the coach is joining the team's weekly meeting. Since the coach was last with the team, the team has identified three change ideas that it is prioritizing for testing. Those changes appear unrelated to the discoveries the team made in its process map investigations. Team members have already begun to scope and design the changes in preparation for testing, and have brought those ideas to the meeting to present. During the presentations, it is clear that team members have thought through the changes in detail, but the presenting team members have not spoken to why each change was selected or how it connects to an improvement target in their system.

At this point in the agenda, the coach is being asked to advise the team on its work to develop cycles of PDSA testing of these change ideas. While a couple of team members have tried running PDSA tests on their own in the past, for most team members this will be their first PDSA and the team is seeking technical advice on how to develop a plan for testing and prepare to "do" the test of change.



Scenario 6: Using Evidence to See the System

A coach is supporting an improvement team of ten teachers, administrators, and clerical staff from one school that has come together around the problem of chronic absenteeism. The coach interacts on a regular basis with an administrator and teacher who are each leading improvement work for the first time as co-leads of the team, although they have each been part of improvement teams in the past. The coach works with the other team members, who are less experienced with improvement, only when joining a meeting to teach or facilitate a particular improvement activity or for occasional one-on-one support. After the coach led the team through learning about several different problem investigation tools, team members have been separately investigating and gathering evidence about absenteeism at their school. They are still in a phase of analyzing the problem and the system, and have not yet turned to building a theory and testing changes, although they are eager to move into taking action.

The team is meeting to share learning from their separate investigations into the problem and to work to surface and understand underlying causes. The co-leaders developed an agenda for the meeting with objectives to share learning, identify root causes, and move towards drafting an aim for the project. They invited the coach to join the meeting to facilitate discussion and help address any technical questions that arise.

Team members have taken their investigation tasks seriously, and people have brought student attendance data, evidence from empathy interviews with students, and process maps of classroom and attendance office procedures related to absences to the 2-hour meeting. After one hour has gone by, the discussion has been very active and team members have generated a number of new questions about absenteeism just from looking at three of the four attendance data displays that were brought to the meeting. The empathy interview data and process map analysis have not yet been discussed. A couple of group members appear eager to move forward. The site improvement lead, who has previously expressed a sense of urgency to begin to test interventions, turns to the coach and says “What do you think about giving empathy interviews 30 minutes and process maps 30 minutes to ensure we meet our meeting objectives?”



Scenario 7: Bringing a New Member Into the Work

An improvement team has been working together, supported by a coach, for about 8 months. During this time the team has investigated its problem and the system that produces it and has developed a first draft of its working theory of improvement. Through that work individuals on the team have significantly strengthened their habits of drawing on evidence to check assumptions and to ground decisions. Members have also completed several testing cycles around different change ideas.

The team recently recruited a new member to join the effort. When she joined the team the new member was provided with copies of the fishbone cause-and-effect diagram that the team developed to represent its understanding of the problem as well as the driver diagram of its current working theory of improvement. One of the veteran team members met with the new member to talk through those visuals and to share what the network was actively testing. However, the team has not taken any formal steps to share the processes through which the theory was developed or to communicate how they use improvement methods to guide their next steps.

The new team member was an enthusiastic participant at the previous team meeting, which was the first she had attended. The coach is now attending a meeting during which the team is discussing its theory of improvement (driver diagram) and taking steps to revise the theory based on learnings from the most recent testing. This is the first time that the team is engaging together in this revision process. One team member mentions a particular change idea and the PDSAs that individuals ran to develop that change in the prior year without elaborating on details, and suggests that the group abandon that change and remove it from the driver diagram based on what was learned through testing. That learning was actively discussed and debated during prior meetings (when the change was initially tested), and returning team members vaguely refer back to those discussions in the conversation.

The coach is aware that the new team member likely doesn't have the background knowledge that the other team members have about the change idea or the specific learning, and also that she may not be clear about when and how different change ideas and drivers are represented in the theory. Right now, the team members are deeply engaged in reflecting on their working theory and focused on the task of revising it, and appear unaware that the conversation may not be accessible to the new team member.



Scenario 8: Engaging System Leaders to Launch a Learning Journey

The coach is just starting work with a medium-sized elementary school that is focused on improving math outcomes, in particular for students with special needs and English language learners. The principal, who likes to set ambitious goals as an instructional leader, has set a target that mathematics achievement for those student groups will improve by 20% across the grades by the end of the school year.

The principal has acknowledged that this kind of growth will require collective effort and openness to doing things differently than they have been done in the past. The school has significant populations of students who are identified as ELL or as having special needs, and fewer than 5% of the students in those groups tested at a proficient level on the last state assessment. To support the effort, the principal has engaged the coach to work with teachers in the second through fifth grades, and is ready for work to begin immediately.

In early conversations, the coach and principal discussed the possible resources that would be available to support this improvement effort, in addition to the support of the coach. The coach also asked questions about the timeline for showing results, in connection to those resources. Since that meeting, the principal has identified two upcoming professional development days that can be devoted to the improvement work as well as monthly, 90-minute grade level team meetings. She also referenced the district-adopted math curriculum as an investment towards improved outcomes, and communicated that use of the curriculum is non-negotiable.

The coach has had the opportunity to meet with several of the grade level teams, during which the coach helped them set up plans to investigate the learning experiences of their focal student groups and the data available about their performance. During those meetings, some of the teachers were hesitant to commit to next steps without getting specific direction or approval from the principal for their plans. One teacher asked if a new program of math instruction had already been identified for these students.

The coach has another meeting scheduled with the principal before the next first professional development day with teachers, and is contemplating how to use that time.



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