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Systems Coaching:
A Model for Building Capacity

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Introduction

Florida’s Multi-Tiered System of Supports (MTSS)

The leadership and staff of the Florida Problem Solving/Response to Intervention (PS/RtI) Project and the Florida Positive Behavior Support: MTSS (FLPBS: MTSS) Project have been working collaboratively to develop a model that integrates both academic and behavioral instruction and intervention across a multi-tiered service delivery system for districts and schools in Florida. The purpose is to provide a statewide integrated, not merely parallel, model for districts and schools to use in designing their own district-specific system of supports for student academic and behavior needs. More specifically, the collaborative vision of the PS/RtI and FLPBS: MTSS projects is to:

• “Enhance the capacity of all Florida school districts to successfully implement and sustain a multi-tiered system of student supports with fidelity in every school;
• Accelerate and maximize student academic and social-emotional outcomes through the application of collaborative data-based problem solving utilized by effective leadership at all levels of the educational system;
• Inform the development, implementation, and ongoing evaluation of an integrated, aligned, and sustainable system of service delivery that prepares all students for post-secondary education and/or successful employment within our global society.”

This formal collaboration between the two statewide projects began in August 2010 and continues to evolve in the development of shared resources, training, and technical services, as well as materials and deliverables for use by school districts and related stakeholders. Florida’s Multi-Tiered System of Supports (Florida’s MTSS) is a phrase used to describe an evidence-based framework of educating students that uses data-based problem solving to integrate academic and behavioral instruction, intervention, and related school improvement initiatives to improve the educational outcomes of all students. The integrated instruction and intervention is delivered to students at varying levels of intensity (multiple tiers) based on student need. Need-driven decision making seeks to ensure that district resources reach the appropriate students (and schools) at the appropriate levels to accelerate the performance of ALL students to achieve and/or exceed proficiency. For more information on Florida’s MTSS, please see the “MTSS Implementation Components” document (2011) which may be accessed online at floridarti.usf.edu/resources/format/pdf/mtss_q_and_a.pdf.

Systems Coaching: A Model for Building Organizational Capacity

Based upon needs identified in the literature in combination with requests from stakeholders in districts and schools across the state, Florida’s MTSS Project has focused on developing and using evidence-based coaching strategies to support MTSS implementation at the district level. Literature from a variety of disciplines (such as educational and
instructional coaching, professional development, educational reform, leadership, evaluation, systems change, and school-based consultation processes) were used to inform the development of a new model of coaching that may be concurrently applied to support educator skill development and building capacity of an organization to sustain use of evidence-based practices with fidelity. While district level personnel are the primary target audience for leading the use of a systems coaching construct described in the present paper, all of the concepts and information herein are deemed applicable at all levels of educational organization. A definition of systems coaching developed for use as a component of MTSS follows. This description was created specifically for use by district leadership teams as they create coaching supports to enhance capacity of their schools to implement and use an MTSS framework for integrating and aligning their multiple school improvement initiatives.

**Systems Coaching** (v.): application of a set of skills that provides dynamic support and facilitation to develop the capacity of school or district teams to implement MTSS aligned with the school or district improvement plans in order to enhance student outcomes.

The above definition reflects the fundamental goal of coaching for MTSS implementation, which is to build capacity of all individuals within the education system. Further, a few tenets must be highlighted when communicating this definition to others. For example, coaching does *NOT* necessarily have to be completed by one person. Coaching can be provided by a number of different individuals depending upon their specializations, skill sets, as well as the particulars of the context of activities. It is unreasonable to assume that just one individual, or one coach will have all the skills required to effectively provide coaching for MTSS in every given situation that may arise. In an era of continually reduced funding and personnel cuts, it is unlikely to assume that all schools and districts will be able to hire enough individual coaches to fill this need (Steinbacher-Reed & Powers, 2011/12). Therefore, it may be the case that the leadership or implementation team members will divide or allocate coaching responsibilities to a number of different people, emphasizing the collective coaching capacity of the organization. The following are additional assumptions of the systems coaching model:

- Although district personnel are the primary recipients of systems coaching in accordance with the mission of the FL MTSS Project, the systems coaching process can be applied to ALL levels of the educational system such as at the state, district, school, classroom, small-group, and individual level.

- Systems coaching is just one critical component required for MTSS implementation and sustainability. Additional critical components (e.g., effective leadership, data-based problem-solving practices, ongoing evaluation of student and systems outcomes) are required to be in place for systems coaching, and ultimately MTSS, to be successful. In other words, systems coaching is a necessary, but insufficient, element of the MTSS implementation landscape.
• In an era of scarce and diminishing funding in education, it is unlikely that all schools and districts have the monetary and personnel resources required to hire and retain coaches to specifically support all MTSS practices related to implementation and sustainability. To remain contextually salient to all educational organizations, this model was developed to remain flexible to the varying resources of districts and schools across Florida and as well as the nation. Therefore, systems coaching can be applied within settings that have resources for coaches and coaching networks, as well as those that do not have funding for coaches.

• The general skills and activities required of systems coaching to support MTSS capacity do not change across educational levels (i.e., school, district, state). However, the means through and degree to which the skills and activities are assembled and applied across the levels of the organization might vary based upon contextual strengths, needs, and goals at that time.

• The collaboration of multiple individuals is required to carry out systems coaching. In other words, one person cannot do it all.

• Any individual that serves in a leadership position (or in any way provides formal or informal training, technical assistance, or any supports to other professionals) is engaged in coaching.

• The focus of systems coaching is based on the identified need(s) of the organization. The organization’s need(s) should guide selection of targets for professional development for all stakeholders, including those individuals responsible for systems coaching.

• Systems coaching can include coaching at the individual, small group, and organizational levels, depending upon the need and level of the educational organization. Further, systems coaching activities can include those activities in which educators with content knowledge expertise provide support directly to teachers for instructional design and delivery to students. These activities, which are commonly described as content coaching methods and procedures, are encompassed within a larger systems coaching framework. (See the brief literature review that follows for more information on instructional/content coaching terminology and activities.)

• The leadership team must collectively hold certain essential skills sets in order to effectively coordinate and support coaching activities. These essential skills should also align and integrate with best practices for effective leadership. According to Florida’s MTSS Project, effective leadership involves:
  – Establishing and articulating a clear vision with a sense of urgency for change, while maintaining focus on and delivering a consistent message of implementation over time
- Focusing on schools (as districts are successful when schools are successful)
- Creating relationships with stakeholders based upon mutual respect and shared responsibility
- Engaging in expert data-based problem solving
- Investing in ongoing professional development

• Systems coaching may be facilitated through a number of different teams depending on the level of the organization (state, district, school) as well as the innovation effort being implemented. Although the following teams all have common elements and multidisciplinary representation, the purpose of each type of team drives its name and function:
  - Leadership team: governs the improvement planning process and decision making related to accountability and evaluation issues. The leadership team sets the expectations and allocates the necessary resources (human, fiscal, time) to the implementation team
  - Implementation team: governs the implementation planning process and decision-making related to systems, staff, and large-group student data. This team drives the implementation process.
  - Problem-solving team: governs decision making related to student data and student learning concerns

**Brief Literature Review: Coaching and Related Areas**

Conventional wisdom and common sense suggest that it is impossible for educators to learn everything they will need to know regarding professional practice during their teacher preparation programs. Thus, the responsibility to provide meaningful professional development to teachers and other school staff has traditionally fallen upon schools, districts, and state agencies that employ these individuals (Russo, 2004). For years, professional development opportunities often have taken the form of one-shot workshops, where educators receive training from external trainers or consultants on topics that may or may not be relevant to instructional needs (Duessen, Coskie, Robinson, & Autio, 2007; Knight, 2009a; Russo, 2004). In such arrangements, teachers typically hear about new practices via lecture-based presentations during professional development days and receive little opportunity for collaborative reflection, follow-up discussions, or guided practice with feedback while attempting to implement the new skills and practices in their classrooms (Darling-Hammond & McLaughlin, 1995; Knight, 2009). Research indicates, however, that this traditional model of professional development is not effective for cultivating professional learning among educators. Effective professional development must be comprehensive, sustained, and job-embedded (Learning Forward, 2011). In order for staff to effectively transfer newly learned knowledge and skills into practice, they need on-the-job support following training. Conceptualizing the means through which educational leaders can integrate high quality professional development into their school and district improvement plans has lead to a great deal of interest in coaching as a vehicle to facilitate implementation of professional development content.
School-based coaching generally involves professionals with expertise in some area (i.e., academic content, instructional practices, whole-school reform initiatives) working closely with individual or small groups of educators to enhance instructional practices with the ultimate goal of positively impacting student achievement (Duessen et al., 2007; Russo, 2004). So promising is the notion of school-based coaching that many schools, districts, and states across the country have embraced the concept as a practical means for enhancing teacher learning and student outcomes (Knight, 2009). Although the enthusiasm for coaching in professional development activities cannot be denied (Duessen et al., 2007; Poglinco et al., 2003), the descriptive, observational, explanatory, and empirical research on coaching, its impact on educator practices, and effects on student outcomes is meager at best (Cornett & Knight, 2009; Killion & Harrison, 2006; Neumerski, 2012; Poglinco et al., 2003). In fact, an adequate definition of coaching or coach has yet to be described that satisfies the needs of all interested professionals and addresses the theoretical tenets of the various coaching models currently in place in the nation’s school systems (Rush & Shelden, 2005b).

Coaching for Instructional Improvement

The majority of the literature on coaching deals with what the authors Neufeld and Roper (2003a) term “content coaching,” or coaching that focuses on helping teachers improve instruction in a particular academic discipline such as reading or mathematics. The majority of coaching in these models occurs at the one-on-one (coach-to-teacher) or small group (coach-to-teachers) level, and deal primarily with enhancing classroom practices to improve student outcomes.

The current research on school-based content coaching and coaching for instructional improvement is largely anecdotal and descriptive in nature, much of it involving case studies, observations, and interviews (Knight, 2009; Neufeld & Roper, 2003a). There are several reasons for this lack of sound empirical evidence for outcomes of school-based coaching. First, there are extensive challenges when attempting to isolate the effects of coaching (Cornett & Knight, 2009; Johnson, Berg, & Donaldson, 2005; Whisnant, Elliot, & Pynchon, 2005). Many forms of coaching exist in theory and practice, thereby making it difficult to identify a consistent treatment definition within and across studies (Erickson & Gutierrez, 2002). In other words, the coaching treatment (i.e., the coaching that was delivered) varies by setting and individual coach. Second, there are many systems variables that inherently confound empirical investigation in school settings. The extent to which the coaching practice is voluntary, the level of leadership support for coaching practices, as well as the nature of the reform effort being employed are all examples of systemic factors that may impact coaching performance in schools. Finally, coaching is often implemented as one component of a broader systemic reform effort, which makes evaluating the impact of coaching in isolation cumbersome at best (Neufeld & Roper, 2003a). With these concerns noted, the following are popular examples of school-based content coaching models with some empirical evidence of effective teacher and student outcomes: Peer Coaching (Joyce & Showers, 2002); Cognitive Coaching (Costa & Garmston, 1994, 2002); Instructional Coaching (Knight, 2007); and Literacy Coaching (Dole, 2004; Toll, 2009).
In sum, the literature on coaching for instructional improvement has been found to impact teacher attitudes, facilitate transfer of training, enhance fidelity and sustainability of new practices in the classroom, increase teacher efficacy and collaboration, and is generally popular with teachers. However, the literature is unclear with regard to which coaching model (content and/or coaching for instructional improvement) is most effective, or the way and/or degree to which coaching impacts student outcomes. Further, it is still unknown what knowledge, skills, and activities are required of effective coaches, how to best evaluate coaching impact on staff and student outcomes, and how to adequately prepare coaches for their role.

Coaching for Change

Whereas content coaches focus on instructional improvements, change coaches or capacity coaches have emerged in the literature and in practice to address whole-school organizational improvement by helping schools examine their resources (e.g., time, personnel, money, schedules) and allocate them more effectively (Nuefeld & Roper, 2003a). Change coaches develop the leadership skills of school staff members such as teachers, support services personnel, and administrators. Neufeld and Roper (2003a) distinguish change coaches from content coaches, in that change coaches typically focus on leadership for whole-school organizational improvement. The role of change coaching does not necessarily exclude direct work with teachers or an interest in classroom instruction, but rather understands classroom instruction as one piece of a larger systemic unit requiring change. Thus, change coaches work with district and school leadership to build capacity of the system to support an evolving professional environment toward enhanced student outcomes. Unfortunately, all the difficulties in measuring the impact of coaching for instructional improvement also permeate the measurement of impacts of change coaching. And, since change coaching is a relatively newer idea, there is even less literature highlighting this type of ongoing professional development arrangement.

Although a limited body of research that has examined the impact of coaching on systems change outcomes currently exists, a significant amount of information is available on the role of the coach in training, implementation, and sustainability efforts (Sugai & Horner, 2006). For example, authors have suggested that change coaches enhance the implementation integrity of the reform effort, assist with the organization of resources to improve implementation, and provide support for leadership teams at various levels of the educational organization. Because of this, change coaching has been imbedded as a critical component in many large-scale reform efforts. Within the systems-change literature and publications on implementing Response to Intervention (RtI) and Positive Behavior Supports (PBS), the role of the coach has also been described as holding a number of specific responsibilities critical for ensuring the organization is sufficiently aligned to support implementation of a given initiative or innovation. Those responsibilities would include:

- Assisting schools and districts in implementing functional rules, routines, and other procedures specific to implementing an initiative with fidelity

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**Systems Coaching**
• Using data to guide decision making and evaluate the effects of an initiative or innovation on intended outcomes
• Helping schools set up varied intervention options and supports for a dynamic and diverse student population
• Facilitating team planning and problem-solving procedures to ensure efficient and effective use of data to guide decision making
• Providing ongoing professional development and technical assistance as needed through modeling, practice, and feedback to personnel (Joyce & Showers, 2002) and primarily maintaining fidelity of implementation following training (George, Kincaid, & Pollard-Sage, 2009)

The literature on change coaching suggests that those coaches take on a wide variety of responsibilities depending upon the context in which they work, the reform effort in which they are supporting, and the degree to which their educational organization is embracing and building capacity for changing practices over time (Sugai & Horner, 2006; Wong & Nicotera, 2006). Therefore, there is not one fixed set of roles or responsibilities for a change coach. Such coaches must be adaptive and responsive to the culture, climate, and context of the organization in which they are supporting.

A New Role for Coaching

According to Michael Fullan and Jim Knight (2011), “school improvement will fail if the work of coaches remains at the one-to-one level. Coaches are systems leaders. They need development as change agents at both the instructional level and the level of organizational and system change. It’s time to recast their role as integral to whole-system reform (p. 53)” Coaches, next to the principal, are the most crucial change agents in the school. With growing understanding that we need to approach educational reform from a larger, more systematic level, the role of the coach needs to advance from being just an instructional coach (i.e., working with individual teachers to improve individual practice) to a change/reform coach working with leadership and leadership teams to build capacity for comprehensive reform.

The implications of Fullan and Knight (2011) require careful consideration. From a systems perspective, an education system exists within a larger socio-political environment that includes the economy. Given the varied roles and responsibilities identified above between content coaches and change coaches needed to (a) provide direct training and technical assistance to classroom teachers and students, and (b) ensure organizational sufficiency and alignment to sustain those training supports over time, one must consider how all those roles and responsibilities will be covered when economic hardships and policy changes are presented to the educational system. Fullan and Knight encourage us to consider coaching as a dynamic set of characteristics, skills, and responsibilities shared across all educators’ roles (i.e., leaders/teachers as coaches and coaches as leaders/teachers) within a team context purposed with overcoming barriers to successful changes needed to improve the outcomes for all students.
**Characteristics of Effective Coaches**

Converging literature on school based coaching suggests that the knowledge, skills, and abilities held by coaches contribute to their effectiveness (Marsh et al., 2008). However, the preponderance of literature on this topic is limited to informal case studies of individual coaching programs, observational and descriptive data, and interviews with teachers and coaches (Kowal & Steiner, 2007; Neufeld & Roper, 2003a). Nonetheless, current knowledge in the field suggests that coaches must hold three broad classes of talents: pedagogical knowledge, content expertise, and interpersonal skills (King et al., 2004; Kowal & Steiner, 2007). First, if coaches are to be effective, researchers agree that they must hold a deep understanding of how students learn and the various instructional practices available within school settings (Neufeld & Roper, 2003a; Poglinco et al., 2003). Coaches must also have a strong knowledge base regarding adult learning processes (Norton, 2000; King et al., 2004). Further, coaches must have a thorough understanding of the subject they are coaching (i.e., literacy, mathematics, science) as well as how the content area instruction must vary at different grade (i.e., elementary, middle, high) and instructional levels. Finally, coaches focusing on changing practices within schools must have a comprehensive understanding of the reform efforts of which they are facilitating implementation (Neufeld & Roper, 2003a; Poglinco et al., 2003).

In addition to pedagogical and content area expertise, authors emphasize the importance of highly developed interpersonal skills among coaches (Kowal & Steiner, 2007; King et al., 2004). Characteristics such as tactfulness, flexibility, supportiveness, approachability, trustworthiness, and communication skills are essential (Brown, Reumann-Moore, Hugh, du Plessis, & Christman, 2006; Poglinco et al., 2003; Wong & Nicotera, 2006). In a 2003 survey of professional development coaches, “people skills” was identified as the most frequently mentioned characteristic of effective coaches, including building relationships, establishing trust, and tailoring assistance to individuals. Authors Killion and Harrison (2006) expand the critical skill sets required of coaches by noting leadership skills, which includes the understanding and application of systems-change concepts to general school improvement planning and goal development.

As indicated previously, while empirical support for coaching is limited in the literature, school-based consultation does enjoy a long history of research-support for teacher and student outcomes. While an in-depth discussion of the similarities and differences between coaching and consultation is beyond the scope of this paper (see Denton & Hasbrouck [2009] for a review), a foundational similarity between the two constructs is that of purpose. The purpose of both coaching and consultation is twofold: 1) to reduce or eliminate a problem in order to achieve a goal and 2) build capacity of another person to more efficiently and effectively solve similar problems in the future. Therefore, the authors would be remiss if we did not access the school-based consultation literature to identify the skills required to be a successful consultant. To be a successful school-based consultant, the research indicates that you must have skills in the following areas: interpersonal-communication skills, problem-solving skills, and content expertise in the area in which assistance is being provided (Curtis, Castillo, & Cohen, 2008; Gutkin & Curtis, 2008).
Integrated Systems Coaching Skill Sets

As previously noted, coaching must be dynamic and responsive to the situation at hand. Therefore, all the possible activities required of systems coaching have been distilled from the literature identified above to a set of seven comprehensive skill sets. These skills, although individually articulated and teachable, are interdependent and must work in chorus to facilitate implementation, sustainability, and effective use of any given innovation or initiative meant to improve school outcomes (from the classroom level up to the district level). These coaching skills are meant to be applied differently based upon such factors as the local context and related resources or barriers available, components of the innovation being implemented for use, phase of implementation change in which the school or district is residing, the goals of the initiative being implemented, and the level of the system in which the innovations are being applied (e.g., classroom, school, or district level).

The seven critical skill sets include the ability to:

1. Demonstrate effective interpersonal communication skills
2. Use multiple sources and types of data to solve important problems
3. Facilitate effective team-based collaborative planning & problem-solving processes
4. Disseminate evidence-based content knowledge. The knowledge includes, but is not limited to, the following content areas:
   a. Organizational change/implementation processes
   b. Innovation/Initiative-specific content expertise
   c. Best practices in reading, math, science, and behavior instruction
   d. Family and community engagement practice
5. Facilitate and support leadership to implement and sustain the innovation/initiative over time
6. Provide evidence-based professional development training and technical assistance to support effective and efficient use of the innovation/initiative
7. Evaluate the impact of coaching activities on implementation goals and intended outcomes on staff and student performance

One should consider which of the above seven skill sets are important for all educators to have, which might be considered role specific, and which might be considered advanced or specialized skills required of only a few individuals. A more detailed description of each of the above seven skills sets follows. It is important for the reader to maintain understanding that it is not who will have all of these skills in a given school, but how will teams be assembled to ensure that there is sufficient availability of all seven of these skill sets to effectively engage in team-based planning for implementation and use of a given instructional innovation, intervention, or initiative.

1. Interpersonal Communication Skills

Interpersonal communication involves a process in which an individual engages in a set of goal-directed, interrelated, appropriate social behaviors matched to a given situation,
which are learned and controlled (Hargie, 2007). Within the context of coaching for MTSS, interpersonal communication skills (in combination with content knowledge and other problem-solving facilitation skills) are required to effectively support implementation. Effective interpersonal communication skills are essential whether one is coaching an individual person, a team of people, or an organization as a whole. The ability to listen, ask open-ended questions, paraphrase, summarize, and synthesize information – all within an nonjudgmental climate – are especially important (Curtis, Castillo, & Cohen, 2008).

Effective interpersonal communication skills build trusting relationships among all stakeholders necessary to support the implementation and sustainability of MTSS, as well as the problem-solving process in general. Since the process of coaching is heavily reliant upon verbal exchanges via conversations and interviews, the effectiveness of the coach’s interpersonal communication skills is essential to the quality of the relationships developed. Although the following is not an exhaustive list of interpersonal communication skills, they are thought to be the most applicable to support systems coaching activities with fidelity.

1. **Active and attentive listening** – a process of searching for and understanding a speaker’s message. This is a complex activity that is more than just passively hearing another talk, but is the acquisition, processing, and retention of information delivered within an interpersonal context (Bostrom, 2007). The key to active, attentive listening is that it often results in a response by the listener to the speaker’s message (Rosenfield, 1987; 2008). Such responses can range from the use of skilled techniques such as summarizing, questioning, and paraphrasing to the use of facial expressions, eye contact, and responses such as “yes” and “uh-huh.”

2. **Summarizing** – a process that occurs when the listener stops to pull together the key points of the speaker’s vast amount of information that has been shared into a brief and concise restatement of the information. Summarizing also provides opportunities to reflect and to confirm or modify the points in the conversation. Summarizing helps the listener(s) to check perceptions and keep track of the information. Summarizing may also provide assistance to the speaker who may not be aware of the patterns, or the relatedness, of the information being communicated.

3. **Questioning** – this process, in the broadest sense, can be described as any statement or nonverbal act that invites an answer. Efficient and effective coaches ask more questions than they make statements. Questioning methods include open- and close-ended questions, as well as clarifying and information gathering questions.

4. **Paraphrasing** – a process of repetition of the essence of speaker’s feelings by the listener (coach) in the coach’s own words. Paraphrasing is a useful technique to evaluate understanding of what is being said, and is a restatement of the speaker’s message, and not just a repeating of the speaker’s words. If paraphrasing is done correctly, it will enhance the meaning and, in turn, contribute to the effectiveness of the communication. Both the speaker and the listener benefit from paraphrasing. The listener has the opportunity to gain a clearer understanding of the message, and avoid false assumptions, errors, and misinterpretations. The speaker also benefits
because the listener is demonstrating interest in the topic and support of the speaker by caring enough to check the accuracy of perceptions.

5. **Delivering** – the process of modeling effective interpersonal communication skills and behavior while working within a collaborative relationship with others. Coaches understand that their relationships with those they are coaching should be collegial and cooperative, rather than hierarchical or coercive (regardless of one’s title, position, or area of discipline within the educational system). The coach is viewed as the facilitator that offers ideas or strategies, rather than an expert who provides answers.

6. **Integrating** – the process of reviewing and synthesizing data and other information shared from different sources into a coherent, comprehensive picture.

7. **Empathizing** – the act of perceiving the internal frame of reference of another while maintaining one’s objectivity (Brown, Pryzwanksy, & Schulte, 2011). Empathy conveys an understanding of the individual(s) seeking assistance, but does not necessarily convey agreement of what is being said.

2. **Data-Based Problem-Solving Skills**

A skill set required within every school or district team is the ability to use multiple sources and types of data to solve important organizational and/or student focused problems. It is important to note that “data-use skills” include:

- Making decisions about what data to gather or collect to answer a particular question
- Logistical planning for the gathering of data, organizing and summarizing the raw data
- Disseminating the summary data including the use of report choices
- Analyzing/interpreting the data
- Making conclusions about how the data help to answer a particular question

Within a systems coaching context, it is essential that the myriad of skills needed to use data on an everyday basis be shared among as many educators as possible within a team context. Yet, even when the capacity of a team to use multiple sources and types of data exists to solve important problems affecting students or school improvement goals, several barriers in the school system can negatively affect how effectively and/or how efficiently a team can solve problems through the use of data. Therefore, data-use skills within a systems coaching context require attention to accurate use of appropriate data within a problem-solving process to resolve concerns about student learning, and education system variables that can impede the fidelity of engaging in data-based problem-solving practices.

Although different problem-solving models exist (e.g., four-step process, eight-step process, Continuous Improvement Model, Lesson Study), all structured problem-solving models incorporate the use of critical questions that should guide educators on what data to select, analyze, and use to make specific decisions. An inquiry-based approach to using data makes data use and decision making most efficient and effective (Feldman & Tung, 2001; Lachat &
Smith, 2005; Wayman & Stringfield, 2006). This advice is contrasted with typical data use practices in schools in which teams attempt to analyze and interpret multiple sources and types of data (each with varying degrees of reliability and validity) in the absence of a commonly shared purpose or question driving their data selection, analysis, and interpretation. Such problem solving team conditions often result in each member seeing something different in the data and impeding the team from developing a plan through consensus. A four-step problem-solving process, such as the model advocated by Batsche et al. (2005) and Castillo et al. (2012), provides a necessary inquiry-based structure for integrating student academic and behavior performance data, both formative and summative, to improve all students’ educational outcomes. In its most basic form, an integrated data-based problem-solving (IDBPS) process involves the following four basic steps:

1. **Problem Identification:** Identify and define a problem (either organizational or student focused) as the difference between what is currently occurring and what is the desired goal
2. **Problem Analysis:** Identify the variables which cause or contribute to the problem
3. **Plan Development and Implementation:** Design appropriate instructional and intervention plans to eliminate or reduce the variables contributing to the problem
4. **Plan Evaluation:** Evaluate the effectiveness of instructional/intervention plans on reaching desired goals

All steps in the above four-step structured problem-solving process require data. Therefore, in addition to using an inquiry-based approach to guide data-use practices, systems coaching requires skills in accurate interpretation of different types of data to support development of solutions with a high probability of success. Some data are useful for screening purposes. Other types of data are useful for testing hypotheses about why a problem exists or for diagnosing a problem further. And yet, other types of data are functional for measuring progress of student performance and evaluating effectiveness of instruction or intervention efforts. Further, a comprehensive data system infrastructure is foundational to support effective and efficient data-based problem-solving practices. The development and maintenance of a comprehensive, aligned, and accessible system of data collection, entry, summarization, reporting, and interpreting practices requires educators to consider staff roles and responsibilities to facilitate the following:

- Leading the team through the four-step problem-solving process to ensure fidelity of the process
- Monitoring of fidelity data (i.e., accurate use of problem solving process, sufficient implementation of plans, etc.)
- Monitoring of resources needed for planned implementation procedures and actions
- Collection of relevant and necessary data (either recurring or as-needed).
- Development and maintenance of technology for data access, analysis, and interpretation
• Development and access to appropriate data displays (i.e., graphing, charting, data walls) for answering specific problem solving questions
• Monitoring of student performance across the tiers and content areas

3. Team-Based Problem-Solving Facilitation Skills

Interpersonal communication and data-based problem solving are key foundational skills for a team when solving pressing issues. However, the success of working through problems toward a solution, even when using a structured data-based problem-solving approach, is only as effective as the team is at collaborating and communicating effectively with each other. Within a systems coaching context, every team needs an effective facilitator at the table who can lead the team toward a solution to a given problem and include job-embedded opportunities for staff to learn and build skills at effectively solving problems together through data-based problem-solving practices. More precisely, there are two sides of problem solving – the content of problem solving and interpersonal/group processes. The interpersonal process requires:

• Attention to collaborative relationships
• Active involvement by all participants
• High levels of trust and confidentiality
• Voluntary participation
• Judgment-free interactions
• A common purpose to make effective decisions through consensus

The role of the team facilitator is varied and in many ways may be contextually driven. But in general, the role of the facilitator is to:

• Ensure pre-meeting preparations
• Ensure assignment of team member roles and understanding of those roles
• Ensure fidelity of using a structured problem-solving process
• Facilitate group movement through the problem-solving process while also ensuring the building of consensus on key decisions and steps

A facilitator is also responsible for following up on communications after each meeting, evaluating team effectiveness in problem solving, and parent involvement. More specifically, Nellis (2012) has identified the following behaviors of an effective facilitator:

• Uses a systems change approach that involves all stakeholders
• Uses a clear mission/vision to guide the team
• Ensures establishment of decisions through consensus
• Communicates, facilitates, and monitors the adherence of a clear team process and set of procedures. This includes establishing and guiding use on clear decision-rules and any documentation requirements as part of the planning and problem solving process
• Defines the roles and responsibilities for all members of the team that account for both a focus on the content of problem solving, and the coaching roles needed to support effective data-based problem solving
• Ensures the right team members are participating in a given team respective to the mission or goal of the team
• Ensures efficient meetings that involve the use of advanced agendas, designated roles, and a focus on activities to complete prior to, during, and following any given meeting
• Ensures opportunities to help all members of the team build their own professional capacities to participate and contribute to an effective and efficient data based problem-solving process
• Ensures availability of administrator supports for all problem solving and decision making practices
• Maintains a long-range vision on continuous improvement through team self-assessment and effectiveness of all problem-solving and decision-making practices

In short, an effective team facilitator is a good listener, well organized, goal oriented, skilled at interpersonal problem solving, skilled at reflective feedback, assertive (but tactful), well respected by the team members, and (above all) trusted in their role.

4. Content Knowledge Dissemination Skills

Coaching requires dissemination of evidence-based content knowledge in the areas in which coaching support is applied. The table below suggests two general areas in which content knowledge is required for knowledge of best practices in instruction and pedagogy, as well as understanding of systems-change concepts that permeate every level of the educational organization. Further, there are content knowledge areas that encompass instructional, pedagogical, and systems issues simultaneously (e.g., data-based problem solving, family and community engagement, best practices in teaming). The table below includes examples of major areas of content expertise upon which systems coaching would rely in the majority of schools and districts. However, this should not be considered an exhaustive list, as the content knowledge required to effectively support MTSS is guided by a number of factors such as school and district culture, climate, location, context, and additional initiatives embraced.
Obviously, it is quite unlikely that any one individual working within the school system would have expertise in all content areas required of MTSS implementation. Therefore, it is critical that multidisciplinary teams comprised of experts from a number of different disciplines work in concert to ensure that those with content area expertise are recruited as either permanent or ad hoc members of the leadership team when issues pertinent to their specializations are identified and addressed.

Systems coaching also requires that evidence-based knowledge in the form of resources, tools, and other strategies are identified, distributed, and utilized by stakeholders when necessary. In this way, coaches disseminate resources by delivering those resources requested by individuals or teams, recommend resources that relate to topics relevant to topics at hand, and share knowledge of evidence-based practices (Killion & Harrison, 2006). Therefore, systems coaching requires knowledge of the resources available within the school and district, how to access and summarize such information, as well as skills in employing appropriate dissemination techniques for sharing such information (e.g., presentation, newsletters, research summaries, newsletters, training and technical assistance sessions).

5. Skills in Facilitating and Supporting Leadership

There are many similarities between those with leadership responsibilities and those with coaching responsibilities. For example, Kemp (2009) suggests that leaders and coaches must:

- Build positive relationships with those they lead or support
- Facilitate and guide the performance growth and professional development of others
- Continually self-monitor and self-manage their own professional needs while also evaluating their impacts on the effective performance and outcomes of those they support

From a systems change perspective, all educators are responsible for not only designing, providing, and supporting effective instruction to students, but they are also responsible
for helping to improve and restructure schools so that the needs of all students can be met (Kovaleski & Glew, 2006). While leaders and staff have different and unique roles, each critically contributes to a collective action toward mission-specific goals of the organization (Zaccaro et al., 2001). All personnel have, therefore, a responsibility to support leadership to reach organizational improvement goals. The complexity of demands in attending to both student outcomes and successful organizational change requires all staff and leaders to integrate their individual actions (both specific and unique roles), and they need to engage in high levels of coordination and communication toward shared goals (Zaccaro et al., 2001). Additionally, given the ever-changing context of school improvement, educators (leaders and staff) have to be adaptive and flexible to make quick adjustments as needed to ensure successful outcomes. Systems coaching activities support this process of effective leadership within an MTSS model. According to the FL MTSS definition, and as suggested above, effective leadership is evidence by five essential activities (see the MTSS Q&A document for more information on this definition). Therefore, systems coaching supports and facilitates effective leadership for MTSS at all levels of the organization (school, district, state) by assisting leadership in:

- Establishing and articulating a clear vision with a sense of urgency for change, while maintaining focus on and delivering a consistent message of implementation over time
- Focusing on schools (as districts are successful when schools are successful)
- Creating relationships with stakeholders based upon mutual respect and shared responsibility
- Engaging in expert data-based problem solving
- Investing in ongoing professional development

6. Professional Development Skills

Systems coaching requires skills related to planning, coordinating, constructing, delivering, and evaluating professional learning opportunities tied directly to the needs of the districts and schools within which educators work. The literature is clear that in order for educators to embrace new beliefs and practices such as those espoused by MTSS, they require high quality professional development tied directly to the unique contexts within which they work to support implementation efforts (Elmore, 2002; Richards, Pavri, Golez, Changes, & Murphy, 2007). Professional development, also known as professional learning, is a broad term to describe the means by which professional educators acquire or enhance the knowledge, skills, attitudes, practices, and beliefs necessary to meet the expectations of their profession (Learning Forward, 2011; Kratochwill et al., 2007). In order for MTSS to be successful, educators require ongoing, job-embedded professional learning experiences at many levels (e.g., teachers, administrators, support service personnel, district leaders) to enhance their individual and collective capacity to implement practices often considered new and innovative (Batsche et al., 2005; Glover & DiPerna, 2007).

Systems coaching requires that individuals responsible for professional learning have a deep understanding of and skills to utilize Learning Forward’s Standards for Professional
Learning Forward’s Standards for Professional Learning

<table>
<thead>
<tr>
<th>Professional learning that increases educator effectiveness and results for all students...</th>
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</thead>
<tbody>
<tr>
<td>Learning Communities</td>
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<tr>
<td>Leadership</td>
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<tr>
<td>Resources</td>
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<tr>
<td>Data</td>
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<td>Learning Designs</td>
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<tr>
<td>Implementation</td>
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<td>Outcomes</td>
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Adapted from Learning Forward’s *Standards for Professional Learning* (2011).

Please visit Learning Forward’s website (www.learningforward.org) for more information on the purpose, descriptions, related research, and examples of the standards in application.

7. Coaching Evaluation Skills

Individuals or teams providing systems coaching support require skills in evaluating the outcomes of the support provided when building capacity at the educator and systems level. According to Killion and Harrison (2006), school districts that invest in coaching “have a responsibility to evaluate the coaching program in order to assess its merit, worth, and impact; improve the program; and provide accountability for the investment” (p. 141). However, many districts launch a coaching program without adequate plans or procedures to evaluate the effectiveness of the coaching model or those individuals who provide coaching support. Although empirical evidence related to the evaluation of coaching is lacking in the literature, authors have offered suggestions on how districts can measure the impact of specific coaching models through surveys, interviews, coaching logs, observations, and permanent product reviews (e.g., Killion, 2010; Killion & Harrison, 2006; Kowal & Steiner, 2007; Neufeld & Roper, 2003). Neufeld and Roper (2003) recommend that districts develop and communicate clear criteria that will be used to evaluate coaches, and that districts create an evaluation instrument that offers summative and formative information of coaching quality and impact. Killion and Harrison (2006) suggest that if coaches or coaching support cannot be formally evaluated, coaches should at least have an
opportunity to reflect upon their work, receive feedback from supervisors, and establish personal goals to their professional development. As many districts and states have established personnel evaluation models, the performance evaluation and related could be adapted and utilized for systems coaching evaluation. For example, many elements of Florida’s Student Services Personnel Evaluation Model (SSPEM) contain common practice standards across the student services professions that focus on evidence-based practices linked to student achievement and behavior. Many of these SSPEM practices mirror activities essential to systems coaching practices within an MTSS model.

Evaluating systems coaching practices requires skills at analyzing and synthesizing data from multiple sources that include both qualitative and quantitative formats and from varying levels of the organization. When districts evaluate systems coaching capacity, it is recommended that they collect data from those individuals providing coaching support and the recipients of coaching, such as leadership team members, educators, principals, and central office staff. Since systems coaching for capacity can be considered a professional development strategy in itself, it is important to consider literature on best practices in evaluating professional development activities when designing coaching evaluation methods and procedures. For instance, Guskey (2000, 2002) recommends gathering data across five levels of increasingly complex information to inform professional development evaluation efforts. The levels include participants’ reactions and learning, organization support and change, participants’ use of new knowledge and skills, and student learning outcomes. In the context of systems coaching, participants would be the various recipients of coaching support.
<table>
<thead>
<tr>
<th>Evaluation Level</th>
<th>Type of Questions Addressed</th>
<th>What is Measured or Assessed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Participants’ Reactions</td>
<td>• Did they like it? • Will it be useful? • Was the coach(s) knowledgeable and helpful? • Would they recommend it to others?</td>
<td>Initial satisfaction with the systems coaching experience</td>
</tr>
<tr>
<td>2. Participants’ Learning</td>
<td>• Did participants acquire the intended knowledge and skills?</td>
<td>New knowledge and skills of participants</td>
</tr>
<tr>
<td>3. Organization Support &amp; Change</td>
<td>• Was systems coaching implementation advocated, facilitated, and supported? • Was support public and overt? • Were sufficient resources made available? • Were successes recognized and shared? • What was the impact on the organization? • Did it affect the organization’s climate and procedures?</td>
<td>The organization’s advocacy, support, accommodation, facilitation, and recognition</td>
</tr>
<tr>
<td>4. Participants’ Use of New Knowledge &amp; Skills</td>
<td>• Did participants effectively apply the new knowledge and skills?</td>
<td>Degree and quality of implementation</td>
</tr>
<tr>
<td>5. Student Learning Outcomes</td>
<td>• What was the impact on student outcomes? • Did it affect student performance, achievement, or behavior? • Is student attendance improving? • Are dropouts decreasing?</td>
<td>Student learning outcomes: • Academic (performance &amp; achievement) • Affective (attitudes &amp; dispositions) • Behavior</td>
</tr>
</tbody>
</table>

Adapted from Guskey, 2002.

In addition to the types of information described above, the evaluation of systems coaching practices would also include specific data regarding the degree to which the seven critical skills sets described in this document are applied effectively to enhance MTSS capacity. Therefore, evaluation questions might include aspects of the following:

To what degree did the individual(s) providing coaching support...

1. ...demonstrate effective interpersonal communication skills?
2. ...use multiple sources and types of data to solve important problems?
3. ...facilitate effective team-based collaborative planning & problem-solving processes?
4. ...disseminate evidence-based content knowledge with regard to:
   a. organizational change/Implementation processes?
   b. innovation/Initiative-specific content expertise?
   c. best practices in reading, math, science, and/or behavior instruction?
   d. family and community engagement practices?

5. ...facilitate and support leadership to implement and sustain the MTSS over time?

6. ...provide evidence-based professional development training and technical assistance to support effective and efficient use of MTSS practices?

7. ...evaluate the impact of systems coaching activities on implementation goals and intended outcomes on staff and student performance?

**Bringing It All Together — Implementing Systems Coaching for MTSS**

The above synthesis and description of the seven critical skill sets will need to occur in concert with each other through a team context that leads and manages an implementation or school improvement process. When those skills are conceptualized as interactive skill sets shared by a team of professionals toward the solution of a given problem, then it is important to show how those skills interact to demonstrate how coaching emerges as a set of activities rather than the role of an individual, and to show systems coaching as a framework for linking school improvement activities and student instruction and intervention planning. The seven critical skills sets may be organized into four broad coaching domains that would need to occur in the school or district setting, in a team context, to guide facilitation of successful MTSS implementation as a framework for school improvement. The four systems coaching domains are:

1. Problem-Solving Facilitation
2. Content/Expert Knowledge
3. Shared Leadership Support
4. Continuous Professional Development

**1. Problem-Solving Facilitation**

The problem-solving facilitation domain includes what others have identified as relational, interpersonal, or communication skills. Successful coaching requires effective interpersonal and communication skills, time management skills, organizational and adaptive skills, and team process skills. Additionally, problem-solving facilitation skills encompass empirically supported school-based consultation skills such as the use of active and attentive listening, summarizing, questioning, paraphrasing, delivering, integrating, and empathizing. Further, coaching for MTSS requires knowledge of empirically validated consultation models and skills to effectively facilitate problem-solving activities at the individual, small group, and systems level within the educational organization.
A number of problem-solving models exist in the literature and in educational practice such as the Continuous Improvement Model (CIM), Lesson Study, IDEAL (Bransford & Stein, 1984), Applied Behavior Analysis (ABA; Bear, Wolf, & Risley, 1968), and Team Initiated Problem Solving (TIPS; Newton, Todd, Algozzine, Horner, & Algozzine). No matter the specific approach utilized, most problem-solving models incorporate similar critical questions to guide educator thinking and decision making.

1. Is there a problem and what is it?
2. Why is the problem happening?
3. What can be done about the problem?
4. Did the planned solution work?

The figure below reflects the continuous, recursive nature of a four-step problem-solving process.

A systems coaching model within an MTSS framework requires fluency in the four-step problem-solving model as illustrated above to address individual student-level problems (Gutkin & Curtis, 2008; Tilly, 2008). Additionally, systems coaching requires fluency in the eight-step small group planning and problem solving process (Curtis, Castillo, & Cohen, 2008) to address systems-level or organizational problems.

2. Content Knowledge

As suggested above, systems coaching within an MTSS framework also requires content knowledge in the areas in which coaching support is applied. When working from a team-based perspective, it is important for at least one individual to have expertise specific to the problem at hand. For instance, an individual with expertise in reading curriculum and instruction would be a necessary team participant when discussing issues with student reading outcome data. A behavior specialist might be a necessary team participant when addressing school-wide behavioral concerns and discipline issues. In addition to content
knowledge related to curriculum and instruction, MTSS implementation also requires expertise on educational and organizational reform processes, effective leadership methods, data use and evaluation, as well as an understanding of national, state, and local policies and procedures. Therefore, it is recommended that team membership be flexible, allowing for rotating participation from professionals with expertise matched to the current issue under consideration.

3. Shared Leadership Support

The literature on the importance of leadership in school change initiatives is clear: leadership is critical to successful implementation and sustainability of any reform effort (Fullan, 2010; Hall & Hord, 2011). Within a multi-tiered system of supports context, coaching not only involves supporting those who provide effective instruction to students, but also involves implementing, sustaining, and evaluating school improvement plans toward desired goals established by leadership. Shared leadership support refers to a recognition that successful outcomes for addressing either student or organizational change concerns cannot be achieved by just having an effective leader or just having effective coaching supports. The reciprocal and functional relationship between leadership and coaching is needed to produce the desired outcomes of the organization (Fullan & Knight, 2010; Harris & Spillane, 2008; Heineke & Polnick, 2013; Kemp, 2009; Zaccaro et al., 2001). In other words, both coaching and leading are required to facilitate change.

The concept of “distributed leadership” within the educational organization is growing in popularity (Harris & Spillane, 2008). This form of leadership recognizes the collective work of all individuals in an organization who contribute to leadership practice, whether they are formally or informally defined as leaders. This form of leadership focuses on teams rather than individuals, and it seeks to empower teachers, support staff, and students as leaders. Growing evidence suggests a powerful relationship between forms of distributed leadership and improved organizational performance and outcomes (Leithwood et al., 2004, 2007). From a systems coaching perspective, teams of professionals engage in distributed leadership to collectively share the responsibilities of coaching to ensure positive student learning outcomes while concurrently building the skills and knowledge of staff in alignment with school improvement goals. In other words, there is a reciprocal relationship between coaching and leadership in this new conceptualization of coaching for MTSS — coaching supports the leadership while leadership facilitates successful coaching efforts at the school and district levels.

Team leadership capacity is dynamic in nature and varies as a function of the representative human capital (knowledge and skills of team members), the context and issues being addressed, as well as the infrastructure in place to solve problems (Day, Gronn, & Salas, 2004). In this conceptualization of shared leadership within systems coaching, the formal educational leader (e.g., building principal, district level administrator, superintendent) is a critical member of a team at any level of the organization. The formal leader brings to the team the ability to allocate resources, delineate responsibilities, and set expectations related to the systems change and coaching activities. In this way, all team
members participate in the leadership processes to create capacity, while the formal leader brings to the team a specific role and skill set necessary to enhance and sustain capacity.

4. Continuous Professional Development

High quality and continuous professional development is the fourth systems coaching domain; it is the umbrella over all MTSS coaching activities. The literature is clear that effective professional development should be job-embedded, evidence-based, and reflective (Learning Forward, 2011) where educators have the opportunity to collaborate and learn together. School and district leaders are responsible for building such capacity for effective professional development practices (King, 2011; Hall & Hord, 2011). In this distributive model, the MTSS leadership team members are tasked with providing ongoing professional development to their staff, matched to the needs of the staff, within a continuous improvement model. The MTSS leadership team is supported in this effort by those responsible for systems coaching within each particular setting. Professional development, also known as professional learning, is applied through a cycle of continuous improvement based upon outcomes of problem-solving processes operating at every level (individual, small-group classroom, school, district, state) of the educational organization (Learning Forward, 2011).

Systems Coaching Model
The MTSS coaching model above is comprised of the four domains that can fall loosely into a conceptual-based hierarchical relationship such that problem-solving facilitation skills and content knowledge combine to inform and support skill development of leadership team members (shared leadership support). In turn, the leadership team develops a plan of action for implementing MTSS and works to incorporate it into their school/district improvement efforts annually. Professional development is a major mechanism for ensuring sustainability of what works and introducing more complex or needed improvements over time regarding staff knowledge and skills to increase efficiency and effectiveness of data-based decision making as well as instructional planning and evaluating of student success.

Primary responsibility for guiding and monitoring implementation and sustainability of MTSS over time would be expected to fall on the leadership team. Problem-solving facilitation skills and content knowledge among leadership team members would be expected to build over time through support of systems coaching as a foundation for empowering the leadership team to then provide guidance and support to all staff toward full implementation of MTSS (shared leadership support). Professional development for educators, coaching support staff, and leadership team members would be considered a core mechanism for ensuring an evolving examination of effectiveness toward sustainability of what works over time.

As with students in schools, educators acquiring new concepts and skills require scaffolding within the context of which the new concepts and skills are to be used for successful learning to take place. The Gradual Release of Responsibility (GRR) model has been used in schools for decades and describes how teachers continually change their instructional interactions and teaching methods as students increase proficiency over time (Pearson & Gallagher, 1983). The GRR model suggests that instruction on any new task requires different proportions of teacher and learner responsibility over time. Through a sequence of description, guided practice, corrective feedback, and independent practice and application, the responsibility of learning gradually shifts from teacher to student. Collet (2008) extends and adapts this GRR model to adult learning tasks when supported by coaching activities, calling it the Gradual Increase of Responsibility (GIR) Model for Coaching. By providing scaffolding through demonstration, modeling, guided practice, and feedback, the individual providing coaching gradually moves the learner toward independence and peer collaboration. Through progressive scaffolding, the coaching support changes over time to match the educators’ increasing ability level and altering needs.

Conclusion

Since the goal of systems coaching is to affect educator change and, ultimately, improve student learning, the four broad coaching domains cannot exist effectively in a static model. The literature on school improvement suggests that educator change is complex, requiring ongoing shifts in knowledge, beliefs, skills, and practices as implementation efforts are
embraced, implemented, and improved upon (Fullan, 2010; Hall & Hord, 2011). Therefore, coaching must occur within a dynamic system, allowing for progressive scaffolding over time to meet the varying needs of stakeholders during various times of the implementation process. The figure below was developed to begin visualizing a model that takes into account the four coaching domains in relation to the ever-changing types and levels of supports required to enhance and sustain educator capacity throughout ongoing implementation efforts and continuous refinement of an integrated MTSS model. In order for coaching to be successful in facilitating MTSS implementation, these four domains must be organized within a dynamic system that allows for continuous and adaptive change. Specifically, the types of coaching activities will change as a function of support required as stakeholders target and progress through the three tiers of MTSS and phases of systems change implementation.

Thus, it is expected that coaching will require different activities and skills as schools and districts build capacity along and among the three tiers of MTSS and through the phases of systems change, concurrently. In other words, coaching must be dynamic and responsive to ongoing growth that takes place when implementing MTSS.
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