

High Quality Professional Learning (PL) Indicator Checklist Companion Guide

Purpose: The purpose of the *High Quality Professional Learning (PL) Indicator Checklist* is to facilitate the design, delivery, and evaluation of high-quality professional learning experiences for educators at the state, district, school, and small-group levels. The tool is comprised of evidence-based indicators reflective of high quality professional learning. The *Checklist* is organized around five domains: 1) *Planning*, 2) *Leadership Support*, 3) *Establishing Readiness to Learn*, 4) *Delivery*, and 5) *Evaluation*.

The *Checklist* can be used in a number of ways to enhance the practices of professional learning providers. Specifically, professional learning providers can use this tool to gather relevant data facilitating Self-Reflection, Peer Observation, and Continuous Mentoring.

Self-Reflection: The tool can be used as a self-reflection document when planning, implementing, and reflecting upon one's application of professional learning activities and to refine such practices over time. A professional learning provider can use the indicators in each of the five domains as reminders, or prompts, for consideration when conceptualizing and planning for a professional learning event or ongoing technical assistance/coaching relationship with stakeholders. As such, the professional learner can access this checklist to strengthen the number of "best practice" elements included within the professional learning activities during design and implementation. Finally, the provider can utilize the *Checklist* after completing a professional learning sequence, reflecting upon which elements were adhered to during the process and using such data to strengthen future professional learning practices.

Peer Observation: An observer can complete portions of the *Checklist* in real-time during professional learning activities to provide feedback on quality of trainings, technical assistance, and/or coaching sessions. Specifically, the *Establishing Readiness to Learn*, *Delivery*, and portions of the *Evaluation* domain (i.e., items that can be observed) can be completed by observers to provide ongoing feedback and coaching to peers.

Continuous Monitoring: The *Checklist* can be used as a continuous monitoring tool for the application of high quality professional learning techniques during the provision of training, technical assistance, and coaching supports over time. When used in this capacity, professional learning providers and/or observers can graph and analyze the number of indicators present during multiple professional learning experiences – comparing the number of items present each time and using such data to inform future activities. Using the *Checklist* in this way would provide evidence for growth (or lack thereof), in the quality of the professional learning activities provided to stakeholders over time.

Professional Learning Domains: The *High Quality Professional Learning Indicator Checklist* is comprised of evidence-based items reflecting elements of high quality educator professional learning. The elements are organized within five domains: 1) *Planning*, 2) *Leadership Support*, 3) *Establishing Readiness to Learn*, 4) *Delivery*, and 5) *Evaluation*.

- 1) **Planning:** The Planning domain outlines elements to consider when conceptualizing and preparing for PL activities prior to implementing a training, technical assistance, or coaching support session, or an ongoing series of such activities. The domain is appropriate to be completed as a self-reflection prior to or after the professional learning event, or ongoing during a series of PL trainings, technical assistance, and/or coaching session.

- 2) **Leadership Support:** Professional learning that increases educator effectiveness and results for all students requires skillful leaders who develop capacity, advocate, and create support systems for professional learning (Learning Forward, 2011). Therefore, the leadership of those targeted for PL must actively support such activities, provide the appropriate time and resources, and inform the targets, goals, and vision for the professional learning developed and executed as aligned with state, district, and/or school plans. The Leadership domain outlines elements to consider when collaborating with state-, district-, and school-level leadership to collaboratively build participant readiness and capacity, champion PL efforts, and create infrastructure and systems for continued professional learning among targeted stakeholders. This domain can be used as a checklist for preparation and self-reflection.

- 3) **Establishing Readiness to Learn:** The Establishing Readiness to Learn domain outlines elements to consider at the beginning of a training, technical assistance, or coaching session to engage and prepare participants for the professional learning experience, prior to delivery of main content. Elements in this domain coalesce to prepare professional learners with an understanding of what they will be learning and why, within a safe-environment that supports collaboration, feedback, and risk-taking. This domain can be used as a checklist for preparation and self-reflection. It can also be used as an observation checklist completed by a peer observer given these elements can be directly observed during a real-time professional learning activity.

- 4) **Delivery:** The Delivery domain outlines elements to consider when providing professional learning to participants to ensure the content and activities are theoretically sound, evidence-based, and adhere to best-practices in adult learning techniques. Professional learning that increases educator effectiveness and results for all students integrates theories, research, and models of human learning to achieve its intended outcomes (Learning Forward, 2011) and engages learners as active participants. This domain can be used as a checklist for preparation and self-reflection. Additionally, as these elements can be directly observed during training, technical assistance, and coaching sessions, it can also be used as an observation checklist completed by a peer observer.

- 5) Evaluation:** The Evaluation domain includes elements to consider when collecting, analyzing, and utilizing data to monitor the quality and effectiveness of stakeholder professional learning, and to inform the improvement of practices over time. The professional learner utilizes quantitative and qualitative data both formatively and summatively to reflect on practice, provide feedback to stakeholders, and develop action plans for improvement. The Evaluation domain can be used for preparation and self-reflection. Additionally, some elements of this domain can be directly observed, thereby allowing for a peer observer to complete and provide feedback to the PL provider. Specifically, items 37-40 may be observed in some situations, and could potentially be used in direct observation feedback as appropriate.

Item Guide:

4. *Assesses needs of primary audience to ensure connection of content to participants' needs and context (e.g., community, school, district, state)

Conducting formal or informal assessments of the needs, beliefs, knowledge and/or current skill levels of participants provides data to inform the design and delivery of high quality professional learning. Needs assessments can be conducted in a variety of ways, depending on the context, resources, and time allocated for activities. Examples of needs assessments include, but are not limited to: Knowledge pre-tests; skill assessments; beliefs, skills, and/or practice surveys; group discussions; guiding questions with reflection; participant share-outs; interviews; and anecdotal information gathered from leadership meetings and district/school visits.

7. *Plans for the summative and formative evaluation of PL outcomes

Evaluation of professional learning must be deliberate, and the development should start during the initial planning phases. Evaluation should be directly aligned with the goals and objectives of the activity – or proposed outcomes. For example, if the professional learning were targeting knowledge development, the outcome evaluated would be the degree to which the learners understood the content delivered. However, if the focus of the professional learning were on the development of new skills, then evaluation would focus on assessing the degree to which participants have acquired the new skills (outcome).

Formative evaluation occurs *during* a professional learning event or activity. The purpose of formative evaluation is to provide those responsible for the activity (PL providers and leadership) with ongoing information about the degree to which the activity is going as planned and if expected progress is being made (Guskey, 2014). If not, formative evaluation data can be used to inform improvements. Often, formative evaluation is a recurring process that takes place multiple times during a series of professional learning events, technical assistance sequences, or coaching relationships to make adjustments, modifications, or revisions. Examples of ways to elicit formative data include, but are not limited to: surveys, guiding questions, skill assessments, participant share-outs, self-reports, observations, document/ permanent project reviews, training evaluations, and anecdotal reports from participants.

Summative evaluation is conducted *at the completion* of a professional development experience, and provides those responsible (providers and leadership) with information on the overall effectiveness of the activity (Guskey, 2014). Summative evaluation describes what was accomplished from the professional learning experience, as well as its consequences (positive or negative) and final results. Examples of summative evaluations include, but are not limited to: self-reports, training evaluations, document/ permanent project reviews, skill assessments, surveys, interviews, direct observation of implementation, and review of educator and student outcomes post implementation.

15. *Frames PL purpose, goals, content, and material within context of systems change and prior PL activities

The professional learning process occurs over time and requires ongoing support for implementation to embed new learning into practice (Learning Forward, 2011). Those responsible for professional learning (providers and leadership) apply findings from systems change research to support long-term growth and sustainability within a continuous improvement model. Effective professional learning integrates research about the individual, organization, technical, and adaptive change through supporting and sustaining implementation for long-term transformation. Therefore, providers must frame all PL goals and activities within the context of a larger, long-term plan for systemic change. Further, professional learning is more effective when it is tied to prior knowledge and is informed by previous professional learning activities. PL providers must integrate current goals and activities into participants' prior PL endeavors, and make direct connections with past and future learning goals to provide a large-scale scope and sequence for sustained, ongoing improvement.

38. *Develops and implements an evaluation plan utilizing a wide variety of strategies and tools to gather information from all participants

A professional learning provider can utilize a variety of strategies and tools to gather evaluation data, both summative and formative, from participants to gather feedback and inform future professional learning activities. Examples of such strategies and tools include, but are not limited to: surveys, focus groups, interviews, data gathered through informal discussion, participant responses to guiding questions, participant reflections, skill assessments, observations, and document/permanent product reviews.

Glossary of Terms

Acquisition. The learner has begun to learn how to complete the target skill accurately but is not yet accurate or fluent in the skill. The goal in this phase is to improve accuracy.

Adaptation. The learner is accurate and fluent in using the skill, and uses the skill in many situations or settings. However, the learner is not yet able to modify or adapt the skill to fit novel task-demands or situations. The goal of this phase is for the learner to be able to identify elements of previously learned skills that can be adapted to the new demands or situation.

Culturally Sensitive Content. Instructional content that is appropriate for any unique needs of the learners based upon racial, ethnic, socioeconomic, and/or organizational differences, as well as the beliefs and practices of the participants, their students and stakeholders, and the schools/districts in which they work.

Feedback. Within the context of professional learning, feedback is the provision of information on how learners are doing in their efforts to reach a particular goal (Wiggins, 2012). Feedback is most useful to learners when it is goal-referenced, actionable, user-friendly, timely, ongoing/formative, and consistent.

Fluency. The learner is able to complete the target skill accurately but works slowly. The goal of this phase is to increase the learner's speed of responding (fluency).

Generalization. The learner is accurate and fluent in using the target skill but does not typically use it in different situations or settings. Or the learner may confuse the target skill with 'similar' skills. The goal of this phase is to get the learner to use the skill in the widest possible range of settings and situations, or to accurately discriminate between the target skill and 'similar' skills.

Gradual Release of Responsibility Model. The gradual release of responsibility model of instruction requires that the teacher (PL provider) shift from assuming “all the responsibility for performing a task ... to a situation in which the students [professional learners] assume all of the responsibility” (Duke & Pearson, 2002, p. 211). The provider starts by directly explaining, thinking aloud, and modeling for the learners. The model next moves to joint responsibility between the provider and learners, followed by independent practice and eventually application by the learner. In other words, the provider moves through the following phases: *Explicit Instruction, Modeled Instruction, Guided Practice with Collaboration*, and then *Independent Practice*. This gradual process may take place over a day, a week, a month, a year, or beyond.

Job-Embedded. Job-embedded professional learning is reform-based professional learning process in which the majority of educator learning takes place in the schools and is directly related to the needs of the school, its educators, and its students (Croft et al., 2010). Examples of job-embedded professional learning include, but are not limited to: Differentiated Coaching, Case Discussions, Problem-Solving/Data Teams, Mentoring, Lesson Study, Observation with Feedback, Portfolio Review, Professional Learning Communities (PLCs), Peer Support/Study Groups, and Action Research.

Simulated Conditions. Settings or circumstances that closely approximate the situations in which a newly learned skill will be applied. When practicing a new skill, the more closely the training setting approximates the workplace, the more likely the transfer of the newly learned skill will be facilitated.

Technology Mediated Instruction. The delivery of content and instruction via digital and online media with some element of learner control over time, place, path, or pace. Examples include, but are not limited to, online modules or courses, instructional and/or practice videos, interactive message boards, real-time feedback/assessment tools, virtual coaching sessions, etc.

Transfer of Training. In order for participant learning to transfer from training to practice, four components must be included in sequence within the professional learning design (Joyce and Showers, 2002): Theory, Demonstration/Modeling, Practice with Feedback, and Peer Coaching. The first focuses on knowledge and consists of exploring the theory or rationale for the new skills or strategies. Subsequently, training needs to involve modeling the new skills – ideally in a setting closely approximate to the workplace. The third component is the deliberate practice of the new skill with ongoing feedback. Finally, peer coaching, the fourth component, is the ongoing, collaborative work of PL providers and learners in planning and developing the lessons, materials, and/or action plans to implement the training effectively into the professional setting within a job-embedded framework.