Fearless Coaching Tools

Book Appendices:
Checklists for Coaches and Clients

Additional Tools

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Coaching and Readiness Checklist: Before the First Call

Before commencement of a coaching relationship, take time to get to know the client and discuss the coaching process. The conversation should be informal and reassuring. It is essential that the coach make clear that the coaching relationship is supportive and nonevaluative, and that the client will be the one setting goals and driving the discussions. The following items can guide the conversation.

Readiness

- ☐ Client is open to receiving support.
- ☐ Client is motivated to change and learn.
- ☐ Client is ready for a collaborative partnership to learn and achieve results.
- ☐ Client is receptive to one-on-one help and guidance.
- ☐ Client is emotionally healthy and able to give intellectual and psychological energy to the coaching process.
- ☐ Client is willing to commit to a period of significant time and work to make the coaching successful.
- ☐ Client has identified draft goals from which to begin the coaching process.

Other:

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Coaching and Readiness Checklist: Before the First Call

Potential Objectives

- Decision making
- Problem solving
- Skill development
- Habit Change
- Develop/improve relationships
- Strategy planning
- Preparation for a new role (for first- or second-year clients in their new positions)
- Improving the client's communication with staff and stakeholders
- Manage change
- Professional development of the client
- Conflict resolution
- Facilitating meetings
- Leading Professional Learning Communities
- Time Management

Other:

What is the most important thing the client should accomplish?

Coaching and Readiness Checklist: Before the First Call

Indicators of Success Criteria

- School achievement data
- School growth data
- Survey results

Other:

Contextual Issue(s) That May Impact Success

- Union issues
- Board/District Office
- Initiatives (list all that may impact)
- Parent/student demographics

Other:

Provision of High-Quality Feedback

- Understand what effective feedback entails
- Determine modalities of feedback
- Structure feedback with/among peers

Other:

First Meeting Checklist: Building the Relationship

In order to best serve the individual to be coached, it is absolutely essential to take time to understand the client. In essence, what drives them? What are their goals? What will the framework of coaching sessions look like (e.g., schedule, etc.)? This instrument is intended to simplify this process for the coach while guiding the first meeting.

Coach: ________________________________ Coach: ________________________________

Meeting Frequency/Duration: ____

Tell me a bit about yourself, both personally and professionally.	
What would you say drives you? What excites you in your role?	
Identify three to five goals you'd like to achieve this year professionally. How do you see me supporting you through this process?	
What are five non-negotiables for you? In other words, what are professional attributes you hold absolutely sacred in your practice?	
Identify three to five potential roadblocks to your success this year relevant to the goals you've identified.	
Explain the criteria you'll want to use to measure success relevant to your identified goals. How will these be measured?	

First Meeting Checklist: Building the Relationship

The coach should spend the time to understand the client's responses clearly. In many instances, it is recommended the coach take the time to ask the client to "Tell me more about" as a means of seeking clarity and meaning. During this first meeting, the coach should be taking notes, listening intently, and then summarizing what was heard after each response.

The last step in the process should be to complete the summary below where the coach identifies their own notes regarding what they perceive as potential challenges, goals, etc. as a means to more effectively serve their client.

Coach Summary:

Coaching Conversations about Root Causes

Questions to Get to the "Root of the Root"

- When you think about the type of learning you want your students to be doing, what is getting in the way?
- When you think about the type of teaching you want to do, what are some obstacles you're facing? Can you describe that further?
- What can you tell me about that student?
- What have you already tried? What does this look like now in your classroom, and how might it look after it's implemented? How will your classroom look different if the problem is solved? How will student learning be impacted by achieving this goal?
- How might student learning look different if this problem is addressed? What concerns you about…? What evidence do you have that supports your concerns?
- How might implementing this idea impact (student engagement, student behavior, and student collaboration)? Of these different areas of concern, which might be a good one to focus on first?
- What are some strengths your students are bringing to the table? When you think about where your students are now and where you want them to be, what are some areas where they may need to grow?
- When you think about implementing, what might get in the way of success for you and your students? What are some resources that you're already using? Why is this goal important to you?
How does this area you're wanting to work on tie into areas your school is focused on improving? How might this tie into an area that your PLC group has identified as a growth area? Tell me more about how you identified this as a goal.
- Are you noticing any patterns when you're observing this behavior? What steps have you previously taken to build a relationship with this person? When was there a time in which you worked well with this person?
- So, what I'm hearing is that you don't feel like you have enough time. What "time" are we referring to—instructional, planning, collaborating?
- What further learning should we do before drafting a plan of action? Who in the school or district might be a good resource for developing a plan?
- What date might be a good time to meet again to share what we've discovered? How might we collect some baseline evidence that would help measure progress?

Professional Goals Checklist

Organizational Goals for Grade-Level Teams, Departments, Schools, Districts

1. The goal is SMART (Specific, Measurable, Achievable, Relevant, Time-Bound).

   ☐ The goal is specific; exactly what we will accomplish is clear.

   ☐ The goal is measurable; we will know when we have achieved the goal and what progress we are making along the way.

   ☐ The goal is achievable; we have the resources and time we need to accomplish this goal.

   ☐ The goal is relevant; it directly affects our mission.

   ☐ The goal is time-bound; we know exactly what day the goal will be accomplished.

2. Calendar Commitments

   ☐ In order to have the time to achieve the goal, we have specific dates and times on the calendar to allocate to this goal and nothing else/

3. Anticipate Initiative Fatigue

   ☐ If we need to cancel other meetings or initiatives in order to achieve this goal, we have done so.

4. Authority

   ☐ We have permission from necessary administrative and policy authorities to have the resources and time to achieve the goal. If agreement from collective bargaining units is required to achieve the goal, we have those agreements secured.

5. Alignment

   ☐ The goal is consistent with our mission, values, improvement plans, strategic plans, and other documents that direct the work of our organization.

Professional Goals:

Personal Goals Checklist

Personal Goals for the Client

At the onset of the coaching relationship, the client will identify an important goal that will become the focus of every coaching conversation between coach and client. Without a goal to guide the conversation, coaching will lack focus, and learning and growth for the client will be limited, as will be the level of change the client is working to create within the organization. Sometimes a client's goal will emerge during the relationship-building conversation as the client and coach discuss the client's values, hopes, and aspirations. Other times, a client may be feeling overwhelmed and need to rely on the coach to assist in the client's search for clarity in determining a goal. The following questions can assist in this process:

- Is there a district initiative the client is responsible for implementing that is new to the school?
- What goal will have the greatest impact on student achievement?
- What is the client passionate about, so that fulling this goal will bring tremendous satisfaction?
- What has the client always wanted to address but has been hesitant to address in the past?
- Is this a measurable goal? How will the client know the goal has been achieved? What will success look like?
- What time frame is the client looking at? Is this a short-term or long-term goal? If it is a long-term goal, what short-term wins can the client look to?
- Are there leadership skills the client wants to strengthen (e.g., giving feedback, communication, having difficult conversations)?
- What new learning is calling the client?
- Will this goal align with the school's overall goals? District goals?
- What are the district's expectations regarding the client's coaching goals?
- Where would the client most like to make a difference?
- Why is that goal important to the client?
- What is currently on the client's plate that is bringing about feelings of anxiety or worry?
- What important process or practice has been successfully implemented in the client's organization but is lacking attention?
- How does the goal align with the client's core values?
- What goal, if accomplished, would make the client feel excited, proud, joyful?

Personal Goals Checklist (Continued)

A coach recognizes a client's personal life is never truly left at home. Concerns and celebrations regarding family, health, dreams, plans, and challenges impact who the client is when walking through the door at work and will determine the level of energy and attention the client will have available to focus on professional goals. For coaching to have the greatest impact on a client's growth and learning, it is imperative for the coach to be aware of a client's personal/life goals in addition to job-performance goals.

Examples are listed here:

- Client is addressing balancing work and home responsibilities.
- Client has moved away from exercise routine (jogging, yoga, gym, home workout), and it is resulting in stress-related issues. Client wants to correct this.
- Client is caring for an elderly parent.
- Client is new to the job and working to overcome limiting beliefs.
- Client is caring for a child or spouse with serious health issues.
- Client is trying to establish a reasonable time for leaving work and sticking to it.
- Client is planning a son's or daughter's wedding.
- Client is working on increasing time for self-care.

Personal Goals:

Effective Time Management Checklist

The essentials of time management are simple, but neither simplistic nor easy.

1. Create a daily prioritized task list (DTPL):

   This is the key to effective time management. A “task” is something that can be accomplished in 45 minutes or less. If 45 minutes is an impossible block of time for you, then you wish to define a “task” as something that can be done in whatever block of time works for you—perhaps 10 or 15 minutes. The DTPL is updated daily. An easy way to do this is with a simple spreadsheet or Trello board, so that the priorities (A, B, C or 1, 2, 3) can be automatedly sorted and updated every day. Every task is captured into this list, so that the client can automatically proceed to the next task in order of priority.

2. Organize Projects into Tasks:

   Divide projects, those requiring multiple tasks, into separate tasks. For example, a project might be “Write observation notes for the fourth-grade team,” and a task might be “write the observation notes for the Tuesday observation of Ms. Smithers.”

3. Daily Accountability:

   Reflect on daily task completion. You cannot have more than six “A” priorities. If you have more, then the same high-priority tasks will occur every day and you will feel that you are not making any progress.

FEARLESS

Leading Collaborative Teams of Teachers and Administrators Checklist

This form is not designed to provide an evaluative score; rather, it is to provide specific feedback for collaborative teams.

School District: ______________________________ School Name __________________________

Date: ____________ Coach _________________________ Meeting Type: ____________________

Grade and Discipline or Department ____

Collaborative Team (CT) Expectation Criteria Ratings:

1— is an emerging CT that is beginning to show signs of being effective.

2—represents a progressing CT, one that is moving towards effective practices.

3— is an effective CT.

4— is given to a distinguished CT that is highly adaptive and showcases progressive practices.

Focus Area One—Meeting Norms, Agendas, and Roles of Team Members	
Meeting norms are established and revisited at each meeting and are known by all members of the team.	
1	Norms are not yet established
2	Norms are established and referenced but not yet used for group behavior.
3	Norms are known by all members, discussed at the start of each meeting, and followed throughout the meeting.
4	Norms are established, revisited, and adapted to determine effectiveness.
Meeting has an established agenda team members follow.	
1	Agenda is not yet being used.
2	Agenda is available but not yet guiding the meeting.
3	Agenda is available to all members, used to guide the meeting, and includes actionable plans for the team.
4	Agenda preview is available beforehand to all members to obtain input, used to guide the meeting, and includes actionable plans for the team. Agendas are formatted consistently.

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Leading Collaborative Teams of Teachers and Administrators Checklist

Each member of the team has a role (e.g., facilitator, recorder, reporter, time-keeper, etc.). Roles are fluid and rotate regularly.	
1	Roles are not yet established.
2	Roles are established but not yet used for meeting efficiency.
3	Each team member is held accountable for their individual roles, working to continually focus on efficiency and effectiveness.
4	Roles are established, regularly rotated and filled by volunteers from the group. Team members hold each other accountable for their roles and the efficiency of the group.

Focus Area Two—Identification of Learning Intentions and Tier-1 Instruction	
Learning Intentions are mutually agreed upon by team members, and all are able to answer the question: What is it we want students to know and be able to do, relevant to the identified learning intentions/standard?	
1	Learning intentions are not yet established by the team.
2	Learning intentions are established but not yet being used for instruction.
3	Team members agree on the learning intention/standard and create success criteria.
4	The language used in the success criteria successfully combines the language of the standards, rigor, and implementation.
Tier-1 instruction is identified by the team based upon the mutually agreed upon expectations for student performance within the identified learning intention/standard. Team members perform this by asking and answering the following question: How will we teach and assess this learning intention/standard?	
1	Team cannot clearly define quality Tier-1 instruction.
2	Team does not clearly distinguish Tier-1, Tier-2, and Tier-3 instruction while identifying how to teach and/or assess the learning intention/standard.
3	Tier-1 instruction is consistently applied for instructional planning within the team, based upon identified learning intention/standard.
4	Tier-1 instruction is consistently aligned to the correct level of rigor of the learning intention/standard for both instruction and assessment, which includes clear plans for differentiation.

FEARLESS

Leading Collaborative Teams of Teachers and Administrators Checklist

Focus Area Three—Evidence of Student Understanding	
Team Members arrive at the meeting with evidence of student understanding (data) relevant to the proposed learning intention/standard.	
1	Team members are not yet coming to the meeting prepared and do not have student evidence/data.
2	Team members arrive at the meeting with student evidence/data, but the data is not of high quality or actionable.
3	High-quality student evidence/data that provides insights into actionable entry points for intervention and enrichment is consistently brought to meetings by all team members.
4	Multiple sources of student evidence/data are reviewed during team meetings, which serves to triangulate or better solidify understanding of student performance and trends over time.
Evidence of student understanding is of inherent value to the team's discussion, which includes differentiated instruction.	
1	Team discussion does not yet include plans for differentiation.
2	Team discussion includes reference to differentiated instruction but without actionable plans.
3	Team discussion includes evidence/data of learning that is consistently aligned with learning intentions/standards and includes plans for differentiation.
4	Team discussion is consistently efficient, with predetermined sources of evidence of student understanding/data (which includes trends of student performance over time), allowing for an in-depth discussion of differentiated learning needs to include preventative instruction.
Opportunities for collaborative scoring of student work among the team are present, which enables teacher calibration of expectations for student performance.	
1	Team does not yet collaboratively score student performance.
2	Team collaboratively scores some samples of evidence/data but not yet with consistency and lacking alignment of expectations.
3	Team members bring samples of student work on an assigned task to the meeting. The team actively engages in collaborative scoring and evaluating the work, using a common rubric. The team works to reach consensus as a means of calibrating team member expectations.
4	All team members bring student work to the meeting and quickly engage in a collaborative scoring protocol. Team members examine a single piece of student work and individually evaluate that work, using a common rubric. When there are differences, team members discuss them and work to reach a consensus to calibrate expectations as well as a means to create data trends and adapt instruction.

FEARLESS

Leading Collaborative Teams of Teachers and Administrators Checklist

Focus Area Four—Team Planning for Intervention and Enrichment Activities	
Team works together to design intervention activities using research-based strategies for students who do not demonstrate proficiency.	
1	Team is not yet planning for intervention.
2	Team identifies need for intervention and chooses strategies to be implemented.
3	Team identifies intervention activities sourced from past successful practices and/or new learning from outside sources aligned with the learning deficit(s) identified.
4	Team has a repository of intervention strategies that is accessible to everyone grounded in research-based best practices, aligned with learning deficit(s) identified for the population of students served within the school.
Team works together to design enrichment opportunities for students who already demonstrate an understanding of the content.	
1	Team is not yet planning enrichment activities and/or assigning additional work for students who already demonstrate proficiency
2	Team plans for enrichment activities without scaffolding rigor for increased expectations.
3	Team identifies enrichment activities sourced from past successful practices and/or new learning from outside sources focused on the scaffolding of rigor.
4	Team has a repository of enrichment activities that focus on higher degrees of rigor within the learning intention/standard while also promoting project-based activities.
The instructional delivery timelines of both intervention and enrichment activities are understood by team members with a plan to review student performance at a later date.	
1	Team has not yet developed timelines for intervention or enrichment.
2	Team has identified a possible timeline for the delivery of instruction, without clear intervals, or planning for the review of student work.
3	Team members are clear on a timeline to implement instructional strategies and have a scheduled date to revisit evidence of student understanding.
4	Team members maintain timelines for the delivery of instructional strategies, allowing for possible adaptation based upon student performance while consistently reviewing student work as a team.

Leading Collaborative Teams of Teachers and Administrators Checklist

Focus Area Five—Team Reporting and Feedback	
At the conclusion of the meeting, all team members depart with meeting notes that include actionable plans for student learning.	
1	Team has not yet developed actionable plans.
2	Team has developed actionable plans, but it is not noted in the minutes.
3	Based on team action plans, each member is clear on next steps (e.g., instruction, data review, etc.), which is reported in meeting notes.
4	Based on team action plans, each member consistently reflects upon action steps and adjusts as necessary between meetings while communicating with other team members and building leadership.
There is an established reporting process used to communicate team meeting notes/decisions that are shared with building leadership teams.	
1	Team has not yet developed a process for communication
2	Team has developed a process for communication but does not regularly use it.
3	Team continuously utilizes the identified reporting process, ensuring that the building leadership team receives timely updates.
4	Team continuously utilizes the identified reporting process, ensuring that the building leadership team receives timely updates and highlights needs for professional development.
Ongoing feedback between the PLC team and building leadership is evident as a means to continue to enhance professional practices as well as to understand student performance.	
1	Reciprocal feedback is not yet developed in the organization.
2	Reciprocal feedback is provided inconsistently.
3	Reciprocal feedback follows an established timeline to gather data to make decisions and is reflected on during meetings.
4	Reciprocal feedback is continuously reviewed/reflected upon and referenced during staff meetings as a means of sharing leadership while encouraging data-based decisions for the building overall.

Comments:

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Leading Indicators Checklist

Relevance

The leading indicator is evidence-based and directly linked to one or more of our results goals. Chapter 14 provides a good place to start for examples of leading indicators.

Accountability

The leading indicator focuses on the specific and observable actions of teachers and leaders.

Control

The leading indicator is completely within our control; we can decide to take the actions that lead to the accomplishment of this indicator.

FEARLESS

Classroom Observation Checklist

This checklist's intent is to provide feedback to teachers regarding high quality. Consider focusing on how to expand criteria, including anchoring to expectations, looking for evidence of the criteria, provision of specific and actionable feedback, and planning for support.

- ☐ Clear and visible learning targets are evident in the classroom.
- ☐ Students understand the learning targets. Learning targets align with state standards.
- ☐ All students are on-task and can explain to the observer what the next action will be when they complete their present task.
- ☐ There are visible examples of proficient work.
- ☐ There is clear evidence of student thinking and understanding, rather than teacher-centered instruction. There is clear evidence of a learning goal for each student.
- ☐ There is evidence of formative feedback—that is, written and oral assessments and checks for understanding that lead to immediate improvements in teaching and learning.
- ☐ There is evidence of strong relationships among students and teachers; they know one another's names and offer positive reinforcement without prompting.
- ☐ There is evidence in small-group work that students understand their roles, learn from one another, provide feedback to one another, and provide a positive and mutually reinforcing environment.
- ☐ There is real-world application.
- ☐ Teacher moves around the room, especially close to students who are disengaged or potentially disruptive.
- ☐ Teacher and students provide immediate and specific feedback.
- ☐ Students make clear and specific reference to the texts and teaching from the lesson.
- ☐ There is evidence of student writing in every subject, and evidence of editing and rewriting.

Comments:

Fearless Coaching Conversations

Follow this structure to support your client in reflecting and taking action on their goals.

Open — Build the coach-client relationship.

- Ask about the client's well-being.
- Be empathetic.

Set Up the Conversation — Focus on actions and goals.

- Follow up on the actions the client committed to during the previous coaching call.
- Inquire if the client has concerns, worries, or situations that have surfaced.

Listen — Show that you are curious and interested in what the client has to say.

- Listen intently without interrupting or jumping in to offer solutions.
- Listen with curiosity and compassion.
- Ask for clarity, paraphrase, or summarize to ensure both parties understand the situation.

Ask Questions— Ask open-ended questions so the client can gain new insights, ideas, and perspectives.

- Ask thought provoking questions, rather than offering advice.
- Ask for clarification.
- Ask what supports the client needs.

Identify Actions — Identify actions in every meeting.

- Prompt the client to determine courses of action based on new insights and discoveries.
- Ask the client to restate the actions.

Close — Summarize the meeting.

- Ask the client what is most important to remember from this conversation.
- Ask if there is anything that can be done to make the meeting more effective for them.

Fearless Coaching Moves

Use these questions, prompts, and tips to move the conversation forward.

Build Relationships

Ask about the client's well-being and be empathetic.

- The last time we spoke…
- How is your (family, spouse, son, etc.)?
- What are you up to in your free time?
- Talk about a recent success.
- What are your strengths?
- What challenges are you facing?
- What does support look like for you?

Tip: Coaching is founded on confidentiality and trust.

Focus on Goals

Keep conversations focused on the goals.

- What outcome are you looking for?
- When we last spoke, you…. How did it go?
- Catch me up on…
- What is going well with…?
- What can you control?
- Are you experiencing any blockers?
- What resources can I share with you?
- How can you break your goal into manageable steps?
- What actions will you take?

Tip: When the conversation derails "go high" by refocusing on the goal.

Deep Listening

Listen intently and with curiosity and summarize what was heard.

- I heard you say…
- What I think you said was, …
- That was a lot, what concerns you most?
- As I listen, I am hearing…
- Can you repeat what you said?
- Can you give me an example?
- Why do you think…?
- Tell me more about…
- Take some time to think.

Tip: Coaching is 80% listening and 20% speaking.

Identify Actions

Ask questions to shift from reflection to action.

- What actions will you take?
- What is important to you?
- What is one small action you can take or implement tomorrow?
- How can you learn more about…?
- What does the data say?
- Why do you think…?
- How might you…. to …?
- How is that aligned to your goal?

Tip: Prompt the client to identify actions based on new insights and discoveries.

Dig Deeper

Support clients in identifying the cause of concerns and problems.

- Ask ***why*** multiple times throughout the conversation to dig down to the root of the problem or concern.
- Can you cast a vision for the future?
- Can you describe a time when things were better?
- Tell me more about how you are feeling right now.