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Orchestration as an Aspect of Leadership in District-Wide Reform:

A Partnership between the Center for Educational Leadership
and Marysville School District

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The Marysville School District launched its district-wide literacy initiative in Fall 2004 and established a partnership with the Center for Educational Leadership (CEL) the following year. This paper presents findings from data collected throughout 2007-2008. During this school year, we collected data at five schools (two elementary, two middle-level, one high school) while monitoring the overall instructional reform in the district. The data analyzed for this report include a total of 41 semi-structured interviews with central office cabinet (N=3), principals (N=11), literacy coaches (N=11), teachers (N=14), and CEL consultants (N=2); and observations of approximately 50 events, including staff development days at each school, department and whole-staff meetings, coaching activities, coaches' professional development sessions, classroom teaching, and district-level instructional content and leadership seminars. We also collected pertinent documents from events for further analysis.

Steps taken for this analysis included an initial reading and open coding of all the relevant data (Emerson, Fretz, & Shaw, 1995), leading to seven broad codes based on the data. We then coded interviews, field notes, and documents. Following this, we used this coded data to identify four overarching themes, which served to guide the organization of this paper. To minimize bias and maximize data quality, we regularly check our assertions with informants from CEL and the school district before proceeding to final writing stages.

This paper is written with the purpose of offering members of the Marysville School District a data-based analysis of some aspects of their literacy initiative. It is divided into four main sections: 1) Orchestration as a goal of school leadership; 2) Principals' leadership challenges; 3) Coaches as leaders in the reform effort; and 4) Leading beyond structures for learning. In a final section, we pose questions to district leaders for consideration in their future efforts.

Section I: "Orchestration" as a Goal of School Leadership

Leading and implementing complex change processes in schools and districts calls an image to mind: that of a conductor leading an orchestra. Conducting an orchestra is a useful metaphor for analyzing the dimensions of leadership that our data suggest are currently challenging (especially) for Marysville's school leaders. Instructional reform in school districts is demanding (Hubbard, Mehan, & Stein, 2006; Supovitz, 2006) because it requires learning of at least two types. First, leaders must develop a "finely tuned ear" (or expertise) about instructional practice, in order to recognize needs and shape the learning experiences of others in the system. Second, educational leaders are called upon to grapple with the nuances of "conducting" or *leading* the overall reform effort. It is this aspect of leadership—the coordination and leveraging of learning and change in a complex setting—that our data lead us to consider in this report.

In this section of the report, we expand the metaphor of "orchestration" to set up our analysis. The concept of orchestration came directly from our read of the data collected in Marysville over the past year. We begin by describing four dimensions of orchestration that are adapted from Zander (2000):

- Being a silent conductor
- Strategizing

- Engaging hearts and minds
- Investing in or developing leadership in others.

We also present an in-depth description of a Marysville principal who seems to be developing skills as a "conductor" of the literacy initiative in her school.

There are some parallels between a principal's leadership of a school staff and a conductor's skill at pulling together an orchestra. First, the conductor has to have the right players in the orchestra; the conductor needs to know each player's strengths and abilities in order to place them in the right seats and sections. Each musician has a part to play, and each section is essential to the sound of the whole. The conductor's vision for the music needs to be communicated to all of the orchestra members—and the conductor must have that finely tuned ear in order to judge the quality of each player's effort and performance, as well as of the overall music produced.

Of course, it's not just up to the conductor. Individual members need to practice and master their parts; the material can inspire or bore; the quality of instruments and acoustics in the concert hall also matter. But, for the most part, the dynamics of "orchestrating" the group and the music lie in the hands of the person on the riser, with the baton in hand. Describing his vision of leadership, the conductor Benjamin Zander (2000) emphasizes the importance of engendering engagement and excellence from orchestra musicians. He says,

> I had been conducting for nearly twenty years when it suddenly dawned on me that the conductor of an orchestra does not make a sound … [H]is true power derives from his ability to make other people powerful …. Now, in the light of my "discovery," I began to shift my attention to how effective I was at enabling the musicians to play each phrase as beautifully as they were capable. (pp. 68-69).

Zander's epiphany, along with statements by Marysville leaders (both central office and school-level), constitute the definition of "orchestration" that we present here. From Zander's description of leadership, we offer four dimensions of orchestration, and expand these dimensions with specific examples from our data. These dimensions of orchestration overlap; for example, encouraging ownership and engagement in work challenges is related to both understanding an end goal and trusting relationships.

Being a Silent Conductor
Zander uses the term "silent conductor" to describe leaders that orchestrate successfully. These leaders are not literally silent—they communicate, facilitate, and share leadership—but they take a stance of listening to constituents, stepping aside at times to allow their potential to grow. The silent conductor is reflective and engaging, developing the skills and passion of individual members:

> Listening for passion and commitment is the practice of *the silent conductor* whether the players are sitting in the orchestra, on the management team, or on the nursery floor. How can this leader know how well he is fulfilling his intention? He can look in the eyes of the players and prepare to ask himself, "Who am I being that they are not shining?" (Zander, p. 74)

Thus, the silent conductor builds his orchestration off of knowing individual members of the team. In the context of Marysville's instructional initiative, leaders might orchestrate as silent conductors when they:

- Coordinate activities and people (with purpose);
- Connect goals of different activities, people, and resources (how different activities, resources, and participants fit together to achieve goals);
- Create platforms for staff members to develop skills and be seen as leaders by peers;
- Clarify and follow up on expectations;
- Build norms of participation in work;
- Engage staff members towards ownership of work;
- Fine-tune goals, expectations, and content of work.

One CEL consultant commented about central office leaders' work to help principals coordinate people and resources, and integrate and make connections across different structures and activities. She said:

> *The other piece was—Larry's* [question] *throughout the year—how do you align everything that you do? … So, this year, Larry and Gail have been more intentional about saying, "Okay, this is your end-of-the-year focus. Then, let's look at your PD. Is it aligned with waiver days? All right, is the work that the coaches are doing aligned with your end-of-the-year focus? And, is your studio work, when Olivia and 'ria come, is that aligned? Because it should all be aligned to support reaching the end-of-the-year goal or focus."* [Consultant A]

Although actions of a silent conductor might suggest using implicit ways of aligning activities and goals, making connections was also explicitly stated by central office leaders as an expectation for principals. One leader recognized that schools vary in how such connections occur in buildings (in this example, between coaching cycles and studio days):

> *The other learning piece is how closely connected the coaching needs to be to the studio work. So, some schools have done that well. Some schools have not. And, they talked last night about the difference that that has made and that the coach and the studio teachers need to be seen as close partners within a school building. It actually helps push the work further.* [District Leader A]

In the schools where coaches and studio teachers do not have close relationships, or where the role of the studio teacher or coach is unclear (an issue we address later), then it can be difficult for principals to make connections across activities.

Strategizing

A significant part of orchestration is strategic thinking and action, which is an integral part of being able to support people through use of time, collaboration, and other resources. For example, one major part of strategizing for the goal of spreading the instructional work across the school building may be to understand where social relationships can deepen or hinder professional learning work. Thus, underlying strategizing is a principal's ability to build

relationships with staff members or to leverage relationships among staff members (or to do both). Drawing on our data from Marysville, principals might be strategic in these ways:

- Select key people as emerging leaders
- Use resources to support activities that are most productive for staff members
- Make use of social capital (defined below)
- Place coaches and resource teachers strategically, e.g., as investigators to assess needs, or to work with specific strong or weak links.

Selecting and developing what one principal called "*key people*" entails knowing the passions and relationships of individual staff members, as well as building on those relationships. Knowing the individuals helps with mapping out the staff as a group – and its multiple sources of knowledge, social influence, and other resources. Principals that orchestrate place financial and professional learning supports at nodes throughout the staff and school building, in order to spread the instructional work and to deepen conversations and trust. In scholarly literature, this is described as making use of social capital:

> *Social capital* is defined as "the resource available to actors as a function of their location in the structure of social relations" …. When applied to education, social capital theory foregrounds the resources that are available to a teacher through social interaction with colleagues, and it posits that particular features of social relations are more or less conducive to accessing appropriate resources and creating a normative environment that enables change in classroom practice. (Coburn & Russell, 2008, p. 3)

In fact, central office leaders already describe their vision and hopes for principal leadership in similar terms. For example, one central office leader talks about sharing the book *The Influencer* with principals:

> *So, we're trying to grow our own understanding of how we influence, and not direct, but we influence in ways that get people to go where they want to go anyway …. So, this was interesting to me, an observation, they're talking a lot about which teachers they have who are really the influencers and maybe, not necessarily, the first innovators …. But the influencers are those teachers who are really respected and connected … and I thought, "They're not talking about themselves at all." They don't see themselves as influencers in their own building …. That was a real eye-opener.* [District Leader A]

Though at least one principal discussed grappling with how to "*influence*" rather than "*push*," principals seemed to look for influencers among teachers; they considered influencers to be peers, not authority figures. Though central office leaders want principals to be influencers, strategic orchestration also includes developing and supporting already-existing influencers.

One central office leader explained that the district leadership was hoping principals would develop into "*leaders that carry the vision, that think systematically and creatively about this work, that think as a leader about how to push the work, how to influence the work …*." Such skills were discussed during leadership seminars for principals. This central office leader added:

> *… [O]ne of the things we found last year was that our principals could not, in their own voice and in their own words, talk deeply about the vision of this work and why we do this work. That was really hard for them. They could say, "Gail says or Larry says," but it was hard for them to do that on their own.* [District Leader A]

Thus, to central office leaders, part of strategic orchestration of the reform initiative within buildings includes the ability to take ownership of the literacy initiative for one's own school.

Engaging Hearts and Minds

A third dimension of orchestration, which Zander refers to when keying into individuals' passions and interests, involves what one central office leader called engaging "hearts and minds" of staff members. For their part, central office leaders also focus on winning the hearts and minds of principals, in addition to a broader vision-setting for the district. This aspect of hearts and minds addresses the need for principals, teachers, and staff members to experience ownership and authenticity in the instructional initiative.

Principals in Marysville have demonstrated, and central office leaders have asked for, leadership in the area of engaging hearts and minds of teachers in several ways. Our data suggest that principals who show emerging orchestration:

- Use formal structures (e.g., staff meetings) to carry messages and set vision;
- "Paint the picture" (set the vision) across formal and informal activities and settings;
- Build relationships and a school culture and climate for learning.

Engaging hearts and minds is not about putting structures in place or making sure teachers participate in activities. Rather, engaging hearts and minds means building relationships such that leaders can key into what strengths, needs, and interests will serve and spark the staff members and students, as this central office leader describes:

> *… [I]t seems like in the first couple of years of Larry being here, in a way [the district has] done a lot of the obvious things. By that, I mean putting in place the really powerful professional development structures, bringing in the content, sort of establishing that in the district, you know. Yes, there is going to be instructional focus. Yes, it's going to be literacy. Yes, there's certain practices that need to be in common. So, you know, those things are there and obvious, but, then, the more complex work comes about, in terms of drawing in sort of the middle category of teachers, you know, the ones who have been sort of watching …. And, it really is an issue of hearts and minds because, you know, the ability to mandate or direct is not something that is going to result in their engagement.* [District Leader B]

From this perspective, engaging hearts and minds is part of orchestration because it entails nuanced use of activities and other structures to reach more people and to spread the depth of the instructional work.

Investing In or Developing Leadership In Others

A final dimension of orchestration includes the development of leadership in staff members other than the building principal. Zander asks, "How much greatness are we willing to grant people? Because it makes all the difference at every level who[m] it is we decide we are leading" (p. 73).

Investing in others implies taking time to build relationships in order to know whom and what to invest in. Ideally, in this dimension of orchestration, the principal, as the formal leader, shares opportunities with others in order to show them (and their peers) their potential and skill. The principal creates concrete ways for emerging leaders to participate in the instructional initiative and to begin to take ownership for its goals. And investing in others means setting goals with individuals to help them achieve their own goals, whether grand or small. Though these are all things that most leaders do every day, there is a certain depth of relationship that makes such investments meaningful for the ones who are being nurtured. The work that is handed over or opened for participation needs to be valued and genuinely important for participants as much as for the principal. To review, some ways to invest meaningfully in others might be to:

- Build relationships to get to know staff members' interests and strengths;
- Invite staff members to set their own goals;
- Work with individuals and small groups;
- Give others opportunities to display knowledge or skill;
- Ask others to take on concrete leadership roles.

For example, central office leaders in Marysville mentioned that orchestration of an instructional initiative includes principals' working directly with teachers—which builds a base for principals to know teachers' individual needs and passions. Underlying this expectation is an understanding of the difficulties in forging genuine relationships between people separated by hierarchy and professional evaluation. Central office leaders understand this challenge:

> *By tradition, when a principal and a teacher talk to each other it's evaluative, because that's the only way that they've ever talked to each other about instruction. So, you've got all that to overcome, and then you have the political power issue …. So, I'm trying to get [principals] to grow a musical scale around growing conversations that they could then have an open-ended conversation …. The goal would be at the end is that you've learned something, not that you've told something. And, that seems to be problematic for some [principals]: "But I'm supposed to know everything." "Well, no." [Chuckles.] "You're supposed to be a learner."* [District Leader C]

In fact, the superintendent has referred to himself as "*a recovering knower*," communicating to principals, coaches, and teachers that learning is valued. Also inherent in using conversations as opportunities to learn is for principals to allow themselves to hear teachers—to see how much greatness they are allowing teachers to achieve.

An Example from Marysville

Orchestration brings together various professional learning opportunities as part of a holistic agenda. Our findings indicate that, when principals "orchestrate" the literacy initiative, they coordinate across activities and events to set a learning agenda. Such principals try to ensure that learning occurs by setting expectations for these activities or through follow-up after the activities. They rely on shared leadership and create a "team" of leaders.

We found several examples of emerging orchestration among principals in Marysville (as well as many that illustrated the challenges of leadership as orchestration—see next section of the report). We selected data regarding one principal's work to illustrate multiple dimensions of orchestration.

Principal A intentionally created planning periods and connected them with coaching activities. This formally set-aside time served the purpose of supporting the instructional initiative as well as engaging teachers in collaboration and in authentic work that they felt the need to do. She restructured time and used resources (such as personnel) to support teachers' work together. She set a goal (vision) for what the planning activities would involve and an expectation of participation for all grade level teams. She strategically placed coaches and a resource teacher in common planning periods to assess next steps in staff-wide instructional work. She noted:

> *This group of teachers is learning a lot about collaboration and the opportunities to collaborate have been built into the schedule. So, it's been my intention to support the opportunities for them to come together….* [Principal A]

This principal orchestrated time and resources and people in order to make planning periods possible. Still, she found it difficult to participate in them herself. She arranged to hear indirectly about teachers' work from coaches. On the other hand, she spoke of wanting to give teachers some space without her monitoring. When she observed in classrooms, even if not for evaluative purposes, she was told by teachers that she makes them nervous. This kind of comment spoke to a deeper seated issue of trust and hierarchical relationships.

Another aspect of orchestration is using multiple structures to contribute to coherent goals. The same principal uses staff meetings as a time to support the literacy initiative. She does so by using intentional language and agenda items in the meetings: sharing "*the most current learning,*" discussing coaching cycles with staff, and using language such as "*magnify [teachers'] work*" and "*carry the message,*" which seem to indicate strategic thinking and vision setting. Her statements indicate that she is thinking about how all the pieces of instruction and learning supports come together (e.g., coaches and studio teachers are mentioned as part of "*carrying the work*" out from staff meetings to coaching cycles and to collaborative planning time). She also "*paints the picture*" for reluctant staff, a phrase that central office leaders used when describing one of their expectations for principals.

Finally, this principal carefully tracks the work of the literacy coach, meeting regularly with him and setting expectations for his work. The coach's work is coordinated with other activities, such as book studies and planning periods. Our observation notes add some caveats, however. The coach explained that the principal does not follow up with teachers who do not respond to coaching; and that, though she urges the coach to move on from teachers who are not taking on changes based on numerous coaching cycles (a course of action suggested by central

office leaders), this coach does not see Principal A picking up on those teachers whom he is told to move on from. So, in this case, perhaps not having her own relationships with teachers inhibits Principal A's leadership of the instructional initiative, even though she does orchestrate resources across people and structures. In the next section of this report, we discuss some other challenges that principals have encountered while grappling with orchestrating (or not orchestrating) the literacy initiative in school buildings.

Section II: Challenges to Principals' Leadership

Principals play a pivotal role in the implementation of district-wide reform initiatives (Gallucci et al, 2005; Supovitz, 2006). As noted earlier, instructional reforms pose challenges for school leaders in two areas: (1) content expertise and (2) leadership and coordination of the reform within their schools.

Marysville district leaders position their principals as critical leaders of the district instructional initiatives. It is not clear from our data, however, whether principals position themselves as leaders or as *participants* in the reform. One consultant described her concern about principals' roles during studio classroom days:

> *It's more like what happens is they come as participants. [Some principals] have consistently tried to work on opening the professional development and doing the whole leadership voice thing. Then, I think, they don't necessarily feel like they know the work real well, so they tend to sort of participate … their role has been pretty much limited to that.* [Consultant B]

Are Marysville principals ready for the challenge of orchestrating this initiative, and what do principals need to be more skillful at orchestration? We examine this question and these aspects of principal leadership in this section by discussing the following:

- Harvesting the leadership being grown;
- Resistant cultures within schools; and
- Existent support for principals.

Harvesting the leadership being grown
Marysville's implementation strategy includes seeking out teachers who will "take on" new instructional strategies and establishing "beachheads" within the district to provide learning opportunities for others. One of the formal structures created to enable this strategy is that of studio teachers: teachers who are offered extra professional learning opportunities and whose classrooms could be used as demonstration sites. Principals in every school in the district have identified studio teachers within their buildings, and these teachers have received approximately 12 whole or partial days per year of various professional learning experiences over one or more years of the four-year reform. This cadre of studio teachers affords district and building leaders multiple options of how to capitalize on this investment.

However, the role of studio teacher appeared to be loosely defined in practice. Most studio teachers perceived their responsibilities as providing a classroom for studio classroom

days and "taking on" new teaching practices. Overwhelmingly, studio teachers saw their role as contained within their own classrooms, with the exception of studio classroom days, when other teachers would observe their work with CEL consultants. Very few studio teachers could name any teachers who had observed their classrooms outside of the formal structure of studio classroom days. One studio teacher saw her potential next step as becoming an observer as other teachers become studio teachers:

> *If* [my principal] *wanted me to work with teachers, great. You know, I think that's just still part of the conversation, "Where do we go from here?" You know, "What do we do with [studio teachers]?" I would love to be the audience now, to kind of work and watch the studio teachers.* [Teacher A]

Other studio teachers were not sure why they were chosen for the role or recalled being given a description of the position that did not match their actual responsibilities. Some of those who did conceptualize their positions as teacher leaders felt unsure of how to meet such expectations. For example, this teacher said:

> *I wouldn't mind some training on how to be a leader, how to spread the word. You just take it on and try to share the best you can but I don't have those skills naturally. And, like you said, who's doing the sharing? I haven't thought of that. I mean, the coaches learn how to coach but I kind of feel like we're supposed to help lead but I'm not sure always how to do that.* [Teacher B]

For studio teachers to be positioned as teacher leaders and their classrooms as sites for public learning, strategic leadership (orchestration) seemed needed to support both the individuals as well as the structures.

The selection of studio teachers continues to be a challenge. Studio teachers with more connections and social capital, as well as an understanding of their roles that includes an organizational dimension, appear to be more prepared to impact their peers. One studio teacher explains her challenges in terms of her lack of social capital:

> *I don't feel like I've done anything that would say they* [teachers in the building] *can't* [come to me with questions]*, just the opposite. I just personally feel they don't—they don't validate me. They don't respect me. And, so, maybe, I'm not the best studio teacher* [chuckles]*, if they feel like they can't come to me.*
> [Teacher C]

Principals' abilities to identify such people and support the networks that already informally exist could aid in harvesting the leadership potential in studio teachers.

Some building leaders have acknowledged their challenges of having to create more supports for continued learning within their schools, but are challenged by how to do this. One principal explained that he knows that it is "partially" his responsibility to enable the "ripple effect" within his school, but the challenges he faces may overwhelm his ability to create such supports.

> *I still think there's a lot of community building and still some trust things, if we could delve through, we could get even more out of them and we're still not seeing as much of that effect in the building as a whole as we would like or need to have. It's still too much with the three or four people that are there and it doesn't ripple out enough, other than just people who get access to those that are there .... I think that's partially my challenge of not creating opportunities to share what happened and share the experience.* [Principal B]

Other leaders echoed this perception that the culture of the school and issues with trust are obstacles in their attempts to induce the participation of other teachers. The issues of resistance and culture are discussed further in the next section of the report.

Some principals and assistant principals have encouraged peer observations by offering classrooms coverage. These principals suggested that teachers set up observations and then schedule with administrators to cover their classrooms. However, few to no teachers have taken advantage of such opportunities. Perhaps because it is a multi-step process for teachers to volunteer, arrange, and plan for these observations to happen. It appears that more structure is needed for such practices to become a norm within schools across the district.

Building leaders may also need to reframe their reasons for wanting teachers to observe one another in the classroom, or for establishing studio teachers. More than one leader within the district suggested that the teachers within their school were not ready to be observed. In other words, they felt their practice was not "expert" enough to offer a learning opportunity to others:

> *And, I think part of the reason that hasn't evolved is everybody is developing but nobody is really a superstar .... And, nobody really knows it all yet enough to say, "Hey, I'm the class everybody wants to watch."* [Principal C]

Such comments frame peer observations as a production, for teachers to observe new practices and hopefully try them on in their own classrooms. What this frame may disregard is the process of inquiry made possible by any collaborative observation. It is evident that such collaboration has not become normalized within the district.

Resistant Cultures within Schools
Many building leaders described a resistant culture within their schools that limits their ability to orchestrate professional learning opportunities. Some leaders explicitly identified this resistance in their interviews and explicated some possible next steps for their schools:

> *I feel, again, that the level of resistance, the cultural aspects are really getting in the way of any work that's going to move forward. So, I'm going to try and move forward with the accountable talk but put it into the bigger, broader context at the same time.* [Principal D]

Others described what they categorized as not resistance, but a reluctance to get involved. Regardless, this culture seems to effect inertia within the schools, undermining the supports and structures leaders are attempting to implement.

> Principal E*: I think there's a mindset, "If I'm going to be coached, it's because I'm not good enough" …. One of my lead teachers did an intro at one of our things and he told a five-minute story about Tiger Woods and how he said, "Here we have Tiger Woods, the best golfer ever, and, what's the most important thing for him? It's that he has his coach with him at all times and why? Because he's always trying to get better and he's at the top of his game." And, it fell on deaf ears. It's just, so, for whatever reason, there's this stigma of, "Work with the coaches because you're not good enough." It's like, "No." So, in that way, our culture has shifted over the four years at least people are saying, "How do I do this?" But it hasn't shifted enough to enable, "It's okay to have a coach help me with my learning."*
> Interviewer*: Does that extend to, they don't want other colleagues in their classroom as well?*
> Principal E*: Yes. Definitely.*
> Interviewer*: So, it's not a practice that they observe each other?*
> Principal E*: No.*

This is an overwhelming theme in this set of data; further, principals appeared unsure of how to overcome the existent cultures within schools.

How are district leaders supporting principals in these leadership challenges?

Principals had a range of reactions to their learning opportunities during the 2007-2008 school year. Overall, however, formally structured learning opportunities for principals seemed to be less available. For example, the principal triads, which existed in previous years, were utilized less this year. Those who did meet in triads found them less helpful than in previous years, which may explain their disappearance. Possible reasons for their inefficacy may include the lack of outside expertise, as well as a culture of competition rather than collaboration, as these principals describe:

> *I don't know that I'm going to see anything somewhere else [in triad meetings] that's going to help me get better. Because we're all kind of mucking around in similar spaces.* [Principal F]

> *I feel like there's a competition between the … schools. That's come through really clearly. I don't do that. That's not who I am. When it comes to—"What are you doing? What are you doing? What are you doing?"—it doesn't feel, it doesn't feel like we're collaborating. It feels like we're competing and I don't like that.* [Principal D]

Principals reported interacting less frequently with district leaders or CEL consultants than they had in previous years. Further, principals, in general, did not seem to fill this void by working collaboratively with other building leaders. An exception to this is the natural partnerships that have emerged from elementary schools that share a coach and studio classroom days. These structures (sharing professional learning opportunities as well as a coach) have created a natural bridge between building leaders' needs.

> *The coaching situation with partner-building coaches gives me that commitment to work with that building because we share studio days together …. We do a lot*

> *of planning and integration on those. Then, you have another building in the
> triad that doesn't share that coach, that's not doing studio together. [Two
> schools in the triad] share studio days, we both have teachers there. We have
> common building goals. We're trying to make our studio days work for both
> buildings, so, it's a natural for us as pairs. And, here's a third building with a
> different coach and different studio work, so, it doesn't lend to the triads.*
> [Principal G]

Otherwise, some building leaders described a lack of learning opportunities for principals
embedded within their own schools. One principal who did reference strong interactions with
district leaders described it as self-motivated:

> *We don't really have a set time, like every month or two weeks, but what I know
> from my experience as an administrator is that it is really important to set
> established times. So, I do self-initiate with [my supervisor] to try to meet once a
> month just to talk about what kinds of work that we are doing in the building, to
> get some input ….* [Principal H]

Section III: Coaches as Leaders in the Instructional Reform

2008 saw changes in Marysville's coaching models as part of continuing implementation
and expansion of the literacy initiative district-wide—particularly, expansion to the high schools
and changes in the elementary coaching role to a central office-based position. This section
discusses aspects of coaching as a source of leadership for the literacy initiative in the district.
We explore the following topics related to coaches':

- Relationships with principals and teachers;
- Coaches' leadership roles; and
- Support for coaches' learning.

We paid close attention to coaching and coaches' learning this 2007-08 academic year because
of the district's financial, intellectual, and collaborative investment in coaches' learning and
knowledge. Through these topics, we hope to both capture interesting areas of growth and point
to potential areas for development of coaches, the Marysville coaching model, and the role of
coaching in the overall literacy initiative.

Coaches' Relationships with Principals and Teachers

As coaches took on positions under direct supervision of the assistant superintendent
(Gail Miller), their relationships to schools changed. Most coaches found themselves in new
schools at least half-time. In schools where coaches had coached in previous years, relationships
changed between coaches and principals. Relationships were a large theme this year for
coaches—whether positive stories of building on existing relationships with teachers and
principals, or more challenging stories of principals or teachers who did not understand the new
coaching role, with its narrower focus. For example, political and social networks, such as union
representation, hierarchical relationships, and staff room whispering, created tensions for many
coaches in the beginning of their tenures, though most negative aspects did decrease over time.

However, several coaches struggled to collaborate with principals and/or teachers throughout the school year, regardless of their approach to building relationships. At the end of the 2007-08 school year, one coach commented, "*That's the hardest part, is the relationships.*"

On the flip side, one coach talked about how relationships with teachers, and time to get to know teachers as learners, has helped her coaching work this past school year:

> *I'm learning how teachers learn, and really that's why I feel for the coaches who are in a new building this year, because they're going through that building-relationships piece, and it's tough .... So, I feel like I'm able to go deeper because of that, you know, with those teachers that want, that I started working with last year. So, I feel, then, that I can apply some of the new things that I'm learning and it's not so much about building relationships and not knowing* [Coach A].

This coach's pool of knowledge includes motivation, socializing/rapport, as well as literacy content knowledge. These beds of information and skill are difficult to build up and take time to learn how to use. Schools with turnover in coaches or with new coaches will likely face greater challenges in seeing success with coaching as a form of leadership or as a leverage point.

As with teachers, there is evidence of coaches' having a range of kinds of relationships with principals. Across the board, coaches and principals co-plan building-level professional learning sessions (e.g., waiver days, staff meetings). Coaches also communicate and strategize with principals on progress and challenges. However, the nature of the collaboration varies.

In one sense, coaches present opportunities for principals to have instructional leadership partners. In some schools, coaches are instructional leaders who are used as resources by principals for being more expert in content knowledge and teacher learning. For example, one elementary coach commented,

> *… [My principal and I have] just realized we're instructional partners and common planning teammates where we talk about our teachers—as if they are our students—as far as their learning needs and getting their needs met, what are they excelling in and how are they responding to our building goal, so, doing some real authentic assessment, walking through together … and I appreciate that because if I'm paid to be a step ahead of everyone I'm glad that she uses me that way.* [Coach B]

The coach above comments on the instructional leadership that the principal has handed over as part of working together as co-leaders (though perhaps not as peers). This is part of a principal's orchestration and nurturing leadership in others; but it could also be an indicator of the principal's discomfort with content knowledge.

In some schools, principal/coach relationships are more strained. Some principals take little role in coaching, leaving schedules and expectations up to coaches and teachers to determine, sometimes allowing coach/teacher tensions to continue unmitigated. At the other end of the spectrum, one elementary principal prefers to direct coaches' allocation of time. She sees the coach as a conduit for her own goals for the school, rather than as a resource based in the central office:

> *[The current coach] was a new person for me and I'm still learning to work with her. How much is she going to just tell me what she's doing in the building and put herself out there and be available, because everybody needs to get to know her; and how much am I going to be able to sort of move my reflections and desires forward through her?* [Principal C]

Though tensions such as these are natural during times of transition, they also signal that some principals are still unclear about their leadership role with regard to coaches, creating uncertainty for the coaches who are trying to balance the goals and needs of principals, teachers, and the central office. This kind of "interference" in terms of the inability to weave a seamless message from central office to the classroom, through multiple players who assume leadership roles (such as principals and instructional coaches), has been documented in the context of other district reform initiatives (Coburn & Russell, 2008; Hubbard, et al, 2006).

Coaches as Leaders

Coaches can take on leadership roles in individual buildings and in the central office when supportive conditions exist. However, some coaches are constrained by the culture in some Marysville elementary buildings (according to coaches and principals). The challenge of a resistant culture within schools, which occurs in our data even when the coach and principal appeared to have a positive relationship, may be connected to any combination of the following sources: staff climate, teachers' responses to the literacy initiative, or teachers' responses to coaching

Regardless of school culture, strong evidence exists that coaches take on leadership roles. They have become the voices of content expertise in buildings; for example our observational data indicate, at staff meetings, principals seem to set tone and goals, while coaches take over the materials, the how-to, and the activities that will help groups of teachers or individuals engage in learning. In these settings, coaches also voice the district's goals, visions, and intentions. There is close alignment between coaches' goals and district leaders' goals. There is evidence of coaches saying, "*Larry would say ...*" or "*Gail says ...*," indicating knowledge of the leaders' vision and mutual trust in each others' judgment.

Central office leaders also turn to elementary coaches as sounding boards for district-wide concerns, such as how to structure summer school training days, how to structure summer school teaching, and how to communicate instructional goals and expectations with teachers (such as how to make use of Harcourt basal readers while moving forward with Balanced Literacy). Though central office leaders are somewhat knowledgeable themselves about individual schools, coaches are approached as sources of knowledge for on-the-ground dynamics in schools, individual teachers and principals, and as peers in terms of growing expertise with content knowledge and pedagogy. For example, one central office leader explained that coaches assist in their decision making around professional development priorities:

> *Our literacy coaches are involved in that and what they are working [on] and noticing and observing in the buildings, what questions teachers are asking, what teachers are taking on, how is that working on going deeper?* [District Leader A]

That is, elementary coaches seem to be a lynchpin for the literacy initiative. They are a source of two-way communication and alignment of work across the central office and teachers, and often, with principals. Because of coaches' important role in the initiative, it is critical that the working relationships between coaches and principals be clarified for all parties.

Following up on learning between seminars or studios.   An important aspect of professional learning (in research and practitioner literature) is the ongoing support for learning between occasions of seminars and other formal learning opportunities. Coaching is one way to support continuing learning over time (Neufeld & Roper, 2003). In Marysville, evidence exists that, following central office leaders' expectations, coaches and studio teachers both share ideas from district-based seminars (e.g., during staff meetings or waiver days) and follow up on ideas (e.g., through coaching cycles). For example, one studio teacher commented:

> *The big value is to be able to see other people teach …. Then, to be able to come back and try it on ourselves has really been a big deal and then go back and see it and have an opportunity to re-visit it again with professionals because you really don't know what your questions are or what you need help with until you do it …. So, and, that's kind of been a new thing lately. [Central office leaders have] been imposing more of that, saying, "Go back and try this thing and come back with some sort of evidence of what happened."* [Teacher D]

In this case, the central aspect to making professional learning more effective and impactful is the continuous nature of re-visiting practices and ideas, asking questions, and collaborating with more knowledgeable people. We have observed most coaches also using coaching cycles to spread the initiative to more teachers (e.g., to practice approaches to shared reading) and to refine practices with studio teachers after instructional practice seminars.

In many schools, however, connecting or following up on learning opportunities are less apparent. Coaching is not focused on particular teachers who are studio teachers or part of "the beachhead," so the purposes of coaching cycles or the purposes of having studio classrooms tend to be unclear. Often, the idea of strategically supporting certain teachers ("going with the goers") is a point of tension for principals. For example, in efforts to make access to professional learning opportunities equitable for all teachers, different staff members (in some schools) attend different events (studio days, instructional practice days, in-school work with coaches, coaching cycles, etc.)—but this approach makes learning opportunities disconnected for participants, and does not allow for continuing, deeper, or more impactful learning for teachers— which, in turn, could lead to less overall engagement in professional learning activities for individual participants. The job for coaches, then, becomes more difficult; they are asked to deepen learning for people who are less engaged or have less foundational experience with content knowledge and the instructional initiative. These challenges detract from coaching as a support for teacher learning.

Another element to consider is whether or not coaches are intentional about or trained to be sources of continuing support to teachers between larger professional learning events. Research supports the idea that building "robust routines of interaction" to supplement district-provided seminars can deepen everyday teacher learning and collaboration. For example, Coburn and Russell (in press) found that:

First, coaches tended to draw on routines of interaction fostered by district professional development that supported depth of interaction during active coaching with teachers. But teachers who were actively coached also tended to have greater depth of interaction with their colleagues even when the coach was not around because they, too, were more likely than noncoached teachers to draw on district-developed routines of interaction. (Coburn & Russell, p. 18)

Though the studio teacher above noted that district instructional practice seminars had built in expectations for "homework" between sessions, it was not clear that coaches were intentionally supporting teachers on that homework, though we do have evidence that they are explicit about helping teachers "try on" instructional approaches.   Two other implicit expectations of coaches are that they act as boundary spanners across units within the school district, and that they facilitate collegial opportunities for teachers (see next section on "Getting Beyond the Structures").

Supporting Coaches

Professional development and support for coaches is a key part of the literacy initiative in Marysville. Elementary reading coaches have, in particular, become a "*tight-knit group.*" Because of coaches' relationships at the district level, they have begun to build relationships between schools. For example, one coach and one teacher—each from different schools—attended the book study of a third school (led by that school's coach). Coaches also paired up to coach each other on their coaching moves, though this did not happen more than once for each pair. In the past, pairs of coaches have also co-taught or co-coached in summer school. Coaches also collaborate in multiple district-wide arenas, such as building units of study for elementary schools. These forms of collaborative work strengthen the work of individual coaches, and sometimes support principals as well, as coaches act as a source of information and overlap.

Based on observation data, we characterize these coaches' meetings as supportive in nature, with problem-solving and good humor. The meetings provide several kinds of support—personal, logistical, and professional. Coaches discuss instruction, their coaching moves to support teacher learning, and how to grow in their coaching practice (in addition to their teaching and content knowledge).   For example, one coach talked about the content and nature of the district-level coach meetings:

> *I feel most comfortable as a coach when I'm with other coaches. And, it isn't that we use that time to gripe and commiserate, but we will often say, "Something that my seventh grade, our teaching staff in seventh grade, is teaching this. Have you guys seen this? Have you done it?" "Well, in my school—." So, we kind of compare notes and say, "Wow, it would really be nice if we had common things in schools."* [Coach C]

At a micro-level, coaches discuss individual concerns. However, the conversations carry larger implications. Coaches come to greater understanding of the initiative in the district and its goals and vision. One district-based coach commented:

> *… [I]t helps also to create this united—not a united front—but a consistency in*
> *what we're rolling out. I mean, [this coach] is secondary but what is really great*
> *to see is the questions that he'll ask me are things I did two years ago. So, I feel*
> *really confident. It's interesting because it reassures me that what I did go*
> *through was part of the process but, then, I feel like I can help the work in the*
> *secondary level, just by being supportive to [this coach] and saying, "Yes, we did*
> *this too. We went through this too. I felt the same way."* [Coach D]

Thus, based on evidence of elementary coaches' learning, regular support may have contributed
to greater depth of understanding, ownership, and implementation of coaching. Conversations
throughout the year began with templates and juggling between shared reading models to
discussing texts to being coached on coaching to designing curriculum maps and now, to leading
summer school trainings. Coaches still had room to "try on" teaching practices and to
experiment with ideas and texts and approaches, and depended on being allowed access to
classrooms by teachers, but their readiness to conduct full coaching cycles was clearly advancing
throughout the year. At least for elementary coaches, this third year of training saw a transition
from being coached on teaching to being coached on coaching, as described by this coach:

> *And, another time was, coaching each other with Olivia around the* Spelling K to
> 8 *work. That was at the very beginning of the year where we went to, like, four*
> *different schools and just pushed in to those classrooms and then Olivia would*
> *lead us in—she challenged us to seeing that we were really just giving feedback*
> *on a lesson when we needed to be giving feedback on that teacher's practice. So,*
> *at that time, it was hard to do the coaching because you had Olivia standing there*
> *saying, "That's not coaching into their practice. That's coaching into their*
> *lesson. I want you to change that." So, you feel this pressure. You're going*
> *around in a circle, "Okay, how do I affect their practice?" It was a good*
> *experience because in the debrief, sometimes, you don't have twenty-four hours to*
> *think about it …. So, that high-pressure situation was important to me because I*
> *want to have the right answers because I want to do my job well. So, doing that*
> *with other coaches is risk-free.* [Coach B]

These meetings afford coaches greater skills and engagement in their work, but they also cost
coaches time. For some coaches, particularly those at the secondary level who are still
classroom teachers, time is so crunched that additional meetings sometimes cause more tension
than their perceived benefit, as this coach commented:

> *So, time is huge. For me, [coaching] two days a week in a school this big, even*
> *though they're really only asking us to do studio teachers and maybe resident*
> *teachers, while still doing other things: writing this, writing that, meeting here,*
> *going there. So, my time is being chopped up so much that I don't have enough*
> *time. I think, having time to meet with your coaches is huge, but, then, you know,*
> *I don't know if I would want it twice a month.* [Coach E]

This tradeoff may question the secondary level coaching model and suggest forms of
professional support that are needed but are more administrative in nature than they are about
professional learning. In cases where insufficient or ineffective support is provided, coaches
must forge their own paths to succeed in their jobs. In some cases, coaches experience difficulty

with being on their own, or without formal roles or administrative support to find ways to work with resistant teachers (this concern relates closely to principals' orchestration of the literacy initiative).

Section IV: Leading Beyond the Structures for Learning

Research on educational reform in school districts provides helpful guidance as well as caution regarding the implementation of such initiatives. Although some districts have successfully implemented formal structures consistent with their improvement goals, they often struggle with supporting the authentic learning needed to benefit from these structures. Districts struggle with informal structures, such as culture or motivation, in striving for long-term change within their systems (Hubbard, Mehan, & Stein, 2006; Supovitz, 2006).   Here, we discuss two aspects of concern and opportunity apparent in Marysville's improvement efforts:

- Offering authentic goals and learning opportunities;
- Understanding roles and harnessing innovation.

Offering Authentic Goals and Learning Opportunities
It is evident that the majority, if not all, of Marysville building leaders have established goals for their schools, and, with the aid of district leaders, they are working to align these goals with the professional learning opportunities in their schools. However, the sources of these goals are often unclear to practitioners, and this may influence how teachers perceive and respond to them.

In several interviews, principals conceded that, in previous years, they had depended upon the district-wide professional development to plan their next steps (one principal said, "*In the past, we simply copied whatever Katherine Casey did*"). These principals suggested that their schools were now independently setting the goals for their schools.   How they developed these goals was rarely explained in specific terms, but some principals stated generally that anyone who spent time in their teachers' classrooms could see why they selected specific goals. Despite claiming that they chose goals based on their individual schools' needs, several schools articulated identical goals that reflected content covered at the district level seminars. For example, at the middle school level, all schools articulated the same goal topics that evolved during the past year: accountable talk and intentional planning.

This analysis is not intended to be a comment on the goals principals chose. In fact, the replication of these goals could be evidence of alignment within the district. Rather, we investigate here how these goals were chosen and who identified the needs that were the catalysts for building goals.

Principals appeared to be the central figures responsible for naming building goals. There is evidence that these goals stemmed from perceived pressure from district leaders instead of from needs identified by school personnel. One district-level coach explained that principals have vocalized their concerns about responding to this perceived pressure:

> *They've [principals] told me point-blank, "So, I know on a walkthrough, I'm going to get pinched with it because this isn't on the wall and this doesn't look*

this way and that doesn't look that way. I know that's what Gail and Larry expect. I'm going to be in trouble." So, they've totally told me that point-blank. They also have a lot of, "Yeah, buts." "Yeah, but I have this discipline problem to take care of." "Yeah, but we have this building goal that we have to do."
[Coach F]

The sentiment "We have this building goal that we have to do" may indicate that principals also perceive other building needs that they feel cannot be met through the district's instructional goals. One principal explained that she felt the district's goals prevented her from working on perceived needs of the school, such as nurturing collegial conversations between teachers:

Principal I*: [We know] that you can work through some difficult conversations, if you have a way to do that, and we found we had to teach teachers how to have those kinds of conversations. To be honest, I'm not allowed to do that here.*
Interviewer*: And, why not? What do you mean, you're not allowed?*
Principal I*: That's not our professional learning focus. If we want to spend any money to bring someone to us or for us to go somewhere to learn a protocol or to talk about, it can only be literacy based …. Before we can have those conversations in any way that really makes any change in the classroom or any collegial conversation that says, "I'm comfortable talking to you about what didn't work in my room," I need to know how to do that. I need to be able to practice it. And, that support isn't here.*

Other principals voiced concern that the established culture within their schools worked against collegial conversations (see Section II). These principals were frustrated by not knowing how to change the culture. One principal who identified a possible next step discussed searching outside of the district initiative or the partnership with CEL for resources:

Principal D: *Well, that's part of my challenge, is that I feel like the next step in the work, one, I want to do … I feel accountable talk … I know that the elementaries have really been working on what accountable talk is, what accountable talk looks like, and I really think that that's a good next step … but I want to take it in a bigger, broader context in, what does accountable talk look like for the adults in the building? And, so, I'm really trying to work with the Franklin-Covey group. I met with a representative from Franklin-Covey to see what kind of "Seven Habits of Highly Effective People" we can bring in for training to work on sort of digging out the dependency stuff where a lot of people are stuck and to see if we can grow some norms around how we're going to treat one another, some common vocabulary that we can use. Because I feel, again, that the level of resistance, the cultural aspects are really getting in the way of any work that's going to move forward. So, I'm going to try and move forward with the accountable talk but put it into the bigger, broader context at the same time.*
Interviewer: *Are there any supports that would help you with these next steps?*
Principal D: *Some grant money.* [Laughs.]

Although at least two principals vocalized a need to grow a collegial culture within their schools (and interview data suggested this was an issue across several schools), no building goals explicitly reflected this need. Further, we did not see in these data evidence of an authentic

process in which principals set a vision built with staff participation or coordinated goal-setting activities within their schools.

One belief undergirding the Marysville instructional improvement plan is that authentic learning opportunities are built in response to learners' needs. Understanding teachers as learners continues to be a difficult challenge for building leaders; but both authentic goals and authentic learning opportunities are essential for districts to capitalize on formal professional development structures and on school participation. Some principals identified the need to be responsive to teachers' learning needs, although they were still unsure of what next steps to take. One principal learned that "*certain experiences didn't necessarily work for certain people*." This seemed to be true throughout the district, leaving leaders asking what was the next step—what other opportunities could they create. Interviews with principals showed evidence of room for more focus on adult learning within school buildings.

Much of our observation data, as well as the interviews, lead to questions about how well leaders are using the gradual release model ("to, with, and by") in planning learning opportunities for teachers. For example, one principal explained why teachers are not putting the new things they see demonstrated into practice. She noted that they have not supported teachers "*all the way through*." We interpreted this statement as a realization that the district has done the "to" but have not completed the full process of "to, with, and by" by continuing to support teachers as they try new practices and then demonstrate those ideas in their instructional work. In terms of understanding her next steps, this principal did not state a specific strategy or set of leadership moves:

> *I think the* [other] *piece* [our school needs] *is the part of slowing down so that teachers can feel that you have to do this in a way that you can maintain it over time .… The sustainability of some of the things I don't think we've supported all the way through; to say, to help them see, "No, we're not ready for the next piece because we haven't figured out how to make sure this stays with us".…* [Principal B]

This principal verbalized the challenge in learning to "*make sure this stay[ed] with us*." This may be an indication that teachers were not being given the opportunity to grapple sufficiently with new ideas while being supported by leaders or consultants. Lack of negotiation (grappling with ideas), or skipping the "with" in gradual release, will most likely lead to surface or rote learning, rather than the deeper learning about instruction Marysville is attempting to reach.

Understanding Roles and Harnessing Innovation (or, "Growing the Work")

Research on organizations shows that there is often a difference between people's actual work roles and their job descriptions (Brown & Duguid, 1991; Blau, 1973). These inconsistencies can cloud leaders' understanding of work (generally considered resistant to change), learning (often abstracted from work), and processes of innovation. Brown & Duguid (1991) argue:

> *To understand the way information is constructed and travels within an organization, it is first necessary to understand the different communities that are formed within it and the distribution of power among them. Conceptual reorganization to accommodate learning-in-working and innovation, then, must stretch from the level of individual communities-of-practice and technology and*

practices used there to the level of the overarching organizational architecture,
the community-of-communities. (p.55)

This argument is built on the assumption that clarity on work, learning, and innovation will be beneficial to the organization, allowing more opportunities for these activities to overlap or intertwine. Brown & Duguid (1991) explain that learning needs to be aligned to the reality of work roles in order for organizations to create opportunities for, as well as capitalize on, innovation. Similarly, new innovation can be used organizationally if aligned with learning opportunities and the reality of work roles. Here, we attempt to identify some informal roles (or roles that have yet to be formalized) within the Marysville School District, as well as possible locales of learning and innovation.

Work - Coaches as boundary spanners.   The primary location of boundary spanning for coaches is between the central office and schools. Much of our data on coaches includes interactions between coaches and principals where coaches acted as links, communicating or coordinating district messages for the individual schools. Because the position of coach is new, the actual roles coaches play as boundary spanners is constantly changing and readjusting. However, boundary spanning provides valuable benefits to the district, as well as some limitations.

Many coaches, particularly the district-level coaches, were accepted by school leaders as legitimate boundary spanners. Coaches' messages were accepted as originating from district leaders (in some cases, the principals actually handed over responsibility to coaches for coordinating school-level learning opportunities in their buildings). However, coaches at all levels were still visibly negotiating their boundary spanning role and were unsure about their responsibilities. One district-level coach explained:

> *… I think it's also about making me more visible to the teachers and the*
> *principals. At one point I did email [district leaders] and* [said] *"I think I should*
> *sit in on some of the principal and coach meetings." And, [district leadership]*
> *mailed me back and said, "And, what would be the purpose?" Well, I probably*
> *would have seen this [conflict] a lot sooner. So, I need to be more aware—I think*
> *my role with the principals needs to be more clearly defined.* [Coach D]

Acknowledging coaches as boundary spanners between the district office and schools could encourage alignment as well as legitimize the coach role. However, our data suggest that the role of coach as boundary spanner led some leaders to opt out of participating in and negotiating the learning goals within the reform. For example, one CEL consultant explained that this year she is working with schools through the district coach, minimizing her interaction with district and building leaders.

> *Well, this year, I do a lot of work with [the district coach]. So, first, when I can, I*
> *try to check in with [district leadership] if there are some decisions to be made or*
> *if there's things we need to talk about, sometimes [the district coach] will*
> *coordinate that. Especially during the content sessions, that's where we see*
> *district-level folks and we have meetings at lunch and debrief how things are*
> *going. Some of the district administrators will show up for the coaching session*
> *days but it's been really inconsistent .… I know [the district coach] is in*

> *communication a lot with the district [leaders] but I don't—in terms of my work*
> *being really clearly aligned with the district or feeling like I'm getting a lot of*
> *communication from them, what else is going on in the district, and how to make*
> *sense of what teachers are doing in these content sessions … there's not the level*
> *of communication that I would like to see as far as just coordinating ….*
> [Consultant B]

If consultants are primarily coordinating goals and activities through district-level coaches, as opposed to being promoted by leaders, the consultants' and coaches' work is at risk of becoming marginalized. Also, this lack of leader participation could have an impact on principals' learning (this was discussed further in Section II).

Another challenge for coaches is that, as boundary spanners, they are subject to multiple sources of guidance and have to negotiate those different sources—principals, CEL consultants, and supervisors. This issue came up particularly in relation to picking which teachers to work with and when to stop coaching teachers. For example, some coaches report being advised by district leadership to not coach resistant teachers, but feeling pressure from principals to do so.

Some research on boundary spanners argues that resources that originally benefit the boundary spanners' abilities to be change agents may eventually constrain their work (Honig, 2006). For example, as boundary spanners gain legitimacy, leaders begin to depend upon them to transfer information or other resources. This dependence may eventually lead to isolation as leaders perceive boundary spanners as "established," thus lessoning support for the role. In the case of Marysville, coaches may become established as "outsiders" from the schools in which they work, and leaders may withdraw from instructional leadership themselves. Our evidence highlights the need for coordinated support from both district and building leaders for coaches to act as change agents. As well, principals need support to understand their leadership role in working with coaches.

Learning - Coaches' Relationship to Collegial Communities.   But coaches also seem to gain advantages from boundary spanning. Because they move between classrooms, grade levels, schools, and central office, as well as meet with other coaches, they are able to reflect on differences between schools and teachers' learning. They also use this expanded network to disseminate ideas across settings (e.g. across schools). For example, one coach carried ideas from one school to another. She commented about this role:

> *That's part of what's really cool. Something will start at one school and I can*
> *share it with the other …. We came up with a template that I shared with [my*
> *other school] and now they're using it here and we're looking specifically at*
> *shared reading and able to look at how that fits.* [Coach G]

Some coaches also connect teachers or coaches from across schools by setting up joint activities, such as book studies, and being strategic about what groups of people could benefit from collaborating. One district-level coach described the act of orchestrating communities as "*bringing people to the table.*" When asked to elaborate, the coach gave the following definition of this phrase:

> *Sometimes I mean it literally, and sometimes I mean it figuratively. So, literally, there are often questions like, "Okay, we have this studio work happening. How many people do we bring to the table to see the studio work and talk about it?" And, sometimes, I mean it figuratively, in terms of, so, the table is this body of work that we're looking at and this process called "balanced literacy." And, so, you know, the table is divided into sections. "So, here's what it looks like and people get involved in the early stages here and here." So, knowing when to bring people to the table, to begin exposing them to it, and, then, to move them from the kiddies table up the big table. So, what I was talking to [another coach] today around, "How do I help my principal think about what to do next year?" So, I said, "This term that I've heard, this notion of readiness to benefit. How do we know that people are ready to benefit from the work that we're doing?" So, that person who you hear time and time again, say, "Well, that's not about us because that's not math." You know? And, that's probably not somebody you want to bring literally to the table, during studio, because it's a waste of your resources. If they're going to walk out and do nothing with it afterwards, why do that? So, I think part of my work, I'm beginning to see, is helping people shape their thinking around that.* [Coach F]

This coach's comments reflect the tension between balancing a broader inclusion of people into the initiative and going deeper with particular individuals.

Although school change literature has generally treated coaching as an individual learning phenomena (coaches work one-on-one with a teacher to change practice), our data demonstrates examples of coaches focusing on collective learning as well. One caveat we found is that coaches are attempting to overcome a culture in some schools that may undermine efforts for collaboration. For example, we did find evidence that trust is an issue for some teachers. According to one principal, who references the climate and health assessment done through the Center for Educational Effectiveness:

> *… [I]t was a common thing, I think, as we sat as principals and looked at everyone's data, is that teachers felt very strongly that they cared and support kids but felt less strongly that their partners or neighbors or peers felt as strong.* [Principal J]

This sentiment identifies a culture that stands as a possible obstacle to collegial learning communities. However, as in the case of Coach F (above) and others, coaches are thinking about how to be strategic in facilitating collective learning.

Innovation – Knowledge Creation. The perceived goal of identifying coaches' roles and understanding their relationship to collective learning opportunities is to harness innovation within the district, leveraging it for change and growth. Nonaka (1994) discusses knowledge creation within organizations, suggesting ways in which the "tacit knowledge"[1] of individuals can be captured and turned into organizational knowledge through processes of amplification

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[1] Tacit knowledge is defined as difficult to formalize and communicate. It is "deeply rooted in action, commitment, and involvement in a specific context" (Nonaka, 1994, p.16).

(increase in range) and crystallization (the concrete embodiment of knowledge to facilitate further knowledge creation) (p.16-17).

We have evidence of teachers' knowledge and innovations being amplified as well as crystallized within the formal structures of the district (e.g. distribution of the Superintendent's memos). However, our data analysis leads us to question how routinely, strategically, and consistently tacit knowledge is identified and legitimized within the formal structures of the school to allow for amplification and crystallization.

For example, although principals have received instructions on the distribution of instructional memos, such communication is reported to be sporadic. Further, the communication from principals to staff regarding what teachers are "trying on" in their classrooms seems to be very inconsistent. Principals and coaches report being reluctant to facilitate peer observations because teachers are not "ready" to "show" what they are doing (See Section II). Further, although some coaches have identified possible inter-school learning communities they would like to facilitate and support, their plans have not been realized because of logistical or leadership challenges.

We offer these examples as possible explanations for why the "tacit knowledge" among individual teachers within the district has not been amplified or crystallized across settings. We argue that communicating a more explicit role for coaches as boundary spanners, which could influence more collective learning opportunities, may create more possibilities to harness innovation   Likewise, opportunities for principals to learn from examples across buildings could "amplify" the tacit knowledge and recent learning of these leaders.

Section V: Questions for Further Consideration

As we conclude, we present questions to consider based on our major findings. We found that there were four areas of overlapping issues across the major sections of this report. These questions are intended to provide food for thought and conversation.

Considering Principal Learning

- o   What structures, routines, or expectations has the district established for principals' ongoing, job-embedded learning? How do central office leaders follow up on these with principals?

- o   What formal structures are established to facilitate conversation between coaches and principals to ensure they understand their joint role in the initiative?

- o   What tools exist to help leaders identify emerging leaders or professional learning networks between staff members?

Considering Culture

- o   How are schools explicitly dealing with issues of trust among staff members?

- How are leaders offering participants ways to participate in processes that promote collegiality?

- How can leaders nurture a culture of inquiry connected to a culture of collegiality?

- How are school and district leaders building relationships with families and community members?

Considering Coach and Teacher Learning

- What feedback loop is available for teachers?

- How explicitly defined are coaches' roles as boundary spanners? What is gained and lost as this role becomes more defined?

- What formal structures exist to facilitate a close partnership between studio teachers and coaches?

- What supports exist to facilitate studio teachers' leadership development or roles?

- How could coaches strategically support teachers' "homework" activities?

Considering Authenticity

- What accountability measures support authentic goals and learning in schools?

- How are leaders consistently offering opportunities for participants to sufficiently grapple with new ideas in order to gain depth?

- When measuring success, are leaders prioritizing scope or depth?

- Are school goals constructed through an authentic process for faculty members?

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