Defining 10 Key Decisions for Creating Teacher Leader Roles

FOR
SCHOOLS
DISTRICTS

Practicing Equity and Ethics | Building Relationships and Partnerships | Fostering Collaborative Culture | Advancing Instruction and Student Learning | Driving Initiatives

Introduction

Implementation of teacher leadership initiatives throughout Ohio has grown in recent years. The Ohio Teacher Leadership Framework (Ohio Department of Education [ODE], 2017) recognizes the diverse forms (both formal and informal) of teacher leadership that already exist in Ohio's schools and districts. To support the continued development of formal teacher leader (TL) roles, at the district-level, this document presents and discusses 10 key decisions for district- and school-level staff when creating such roles.

The Ohio Teacher Leadership Framework states, "Teacher leaders are teachers who, while remaining in the classroom, take on additional leadership responsibilities beyond their own classroom with other teachers as well as district, state and national leaders, to advance the profession with the ultimate goal of enhancing student success" (ODE, 2017, p. 4). In this document, the TL role refers to a position at the school level for which teachers are released part-time to serve as instructional leaders.

Before addressing the 10 key decisions, district staff should develop an explicit theory of action to gain clarity on how they expect the TLs to contribute to the overall goals of the teacher leadership initiative.

Ten Key Decisions for Creating a TL Role

Going through the 10 decision points to create and define the TL role will help district leaders clarify the nature and scope of the role, identify others who may also work with the TL on instructional improvement tasks, guide staffing and training requirements and provide details of the actual TL appointment. The 10 decision points are presented in Figure 1.

Figure 1. Ten Key Decisions for Creating a Teacher Leader Role in an Ohio School District

Decision 1.
- What are the district's instructional improvement strategies?

Decision 2.
- What are major instructional improvement tasks associated with the district's strategy?

Decision 3.
- Who will perform each of the major tasks?

Decision 4.
- How will each major task be divided into subtasks?

Decision 5.
- Who will perform each of the subtasks?

Decision 6.
- What are the final tasks for the TL role?

Decision 7.
- How many hours will be allocated to the role and the tasks?

Decision 8.
- What will be the final role description and approval for it?

Decision 9.
- How will the role description be used for the teacher leader staffing and training?

Decision 10.
- What should be included in a TL appointment letter?

Source: Heneman III, H., Milanowski, A., and Finster, M. (2016). *Guide to creating teacher leader positions*. Rockville, MD: Westat.

An Example of the Decision Process

Following is a hypothetical scenario that walks through each of the 10 key decisions listed above.

1. What Are the District's Instructional Improvement Strategies?

The district's instructional improvement strategies should be clear before a TL role is created. Possible strategies include: improving specific teacher skills, improving curriculum content areas, improving teacher performance competencies and improving teacher quality through recruitment and retention.

Here and throughout the remainder of the scenario, the example instructional improvement strategy is improving specific teacher skills to advance instruction and student learning.

2. What Are Major Instructional Improvement Tasks Associated with the District's Strategy?

The goal here is to take each instructional improvement strategy and identify the major tasks that will drive the strategy forward. At this point, decisions about who will perform those tasks are <u>not</u> made.

Consider the strategy above: advancing instruction and student learning. District administrators may begin by creating a special project team composed of the principal, TLs and district professional development staff. Based on the project team's recommendations, the district decides there are three major tasks that need to be carried out to advance instruction and student learning (or facilitate improvements in instruction and learning):

- Model and coach the use of data to inform and guide instructional decisions;
- Engage in the development, implementation and evaluation of job-embedded professional development; and
- Create and support teacher learning teams.

The district believes that these three major tasks make good instructional sense and that TLs could play an important role. The district also decides that the tasks need to be explicitly assigned to different staff members or departments who will be responsible for their completion.

3. Who Will Perform Each of the Major Tasks?

The project team now reviews the tasks and decides who (i.e., principal, TL or district central office staff) will undertake each. Obviously, no one person should be responsible for all the tasks, but some tasks should be shared. The team agrees that the major tasks should be allocated as shown in Table 1 below.

Table 1. Allocation of Instructional Improvement Strategy Tasks

Role	Major tasks		
	1. Model and coach the use of data to inform and guide instructional decisions	**2. Engage in the development, implementation and evaluation of job-embedded professional development**	**3. Create and support teacher learning teams**
Principal		X	X
TL	X	X	X
Director of professional development (PD)		X	

4. How Will Each Major Task Be Divided Into Subtasks?

Following Step 3, the project team learns that with one exception (Task 1), staff will share the identified major tasks. Next, each task needs to be divided into subtasks, with a rule that there be no more than three subtasks for each. In a one-hour meeting the project team identifies and agrees on the following example subtasks:

- **Task 1: Model and coach the use of data to inform and guide instructional decisions.**

  Subtasks:

  1a. Suggest practices or materials teachers could try in order to improve use of data to inform and guide instructional decisions.

  1b. Demonstrate how to use data-related materials or practices in the teacher’s own classroom, or by inviting the teacher to observe in another classroom.

  1c. Observe teachers applying new practices or using new materials to improve use of data and provide feedback.

- **Task 2: Engage in the development, implementation and evaluation of job-embedded professional development.**

  Subtasks:

  2a. Review instructional practices to identify areas of strength and improvement common to teachers at the grade, subject and school levels.

  2b. Identify potential development methods, providers and schedules for individual, grade-wide, subject-wide or school-wide professional development.

  2c. Plan and conduct individual, grade-wide, subject-wide or school-wide professional development sessions focused on areas of improvement.

- **Task 3: Create and support teacher learning teams.**

  Subtasks:

  3a. Identify teachers with common areas of instructional improvement as potential teams and teachers with similar areas of strength as potential resources for teams.

  3b. Assist teachers in analyzing instructional practices and evidence, identifying possible practice changes, sharing resources and planning how and when to try new practices.

  3c. Facilitate teams by scheduling meetings, drafting agendas, locating resources and recording team activities.

5. Who Will Perform Each of the Subtasks?

Upon reviewing and discussing the subtasks, the project team determines who will be responsible for each, as shown in Table 2.

Table 2. Assignment of Instructional Improvement Strategy Subtasks

Subtask	Responsibility: Principal	Responsibility: TL	Responsibility: Director of PD
1a. Suggest practices or materials teachers could try to improve use of data to inform and guide instructional decisions.	X	X	
1b. Demonstrate how to use data-related materials or practices in the teacher's own classroom, or by inviting the teacher to observe in another classroom.		X	
1c. Observe teachers applying new practices or using new materials to improve use of data and provide feedback.		X	
2a. Review instructional practices to identify areas of strength and improvement common to teachers at the grade, subject and school levels.	X		
2b. Identify potential development methods, providers and schedules for individual, grade-wide, subject-wide or school-wide professional development.	X		X
2c. Plan and conduct individual, grade-wide, subject-wide or school-wide professional development sessions focused on areas of improvement.	X	X	
3a. Identify teachers with common areas of instructional improvement as potential team members, and identify teachers with similar areas of strength as potential resources for teams.	X		
3b. Assist teachers in analyzing instructional practices and evidence, identifying possible practice changes, sharing resources and planning how and when to try new practices.		X	
3c. Facilitate teams by scheduling meetings, drafting agendas, locating resources and recording team activities.		X	

6. What Are the Final Tasks for the TL Role?

The steps above indicate what major tasks and subtasks will become part of the TL role. The project team also may want to make it possible for principals to add other school-level tasks, as long as they are compatible with the instructional improvement strategy the TL role was designed to support.

7. How Many Hours Will Be Allocated to the Role and the Tasks?

After establishing the tasks for the TL role, the project team, with input from school principals, needs to determine how many hours per week the TL will serve, both during and outside school hours, as well as the average number of hours (or percentage of time) that should be spent on each task. There is no standard time allocation for the TL role, and the typical range is 3 to 20 hours per week.

At least three factors should be considered when deciding the number of hours for the role: the degree of challenge in the tasks, the likely impacts on teachers and affordability.

To continue the example from above, the project team recognizes that the TL tasks are often complex and challenging since they cover the full range of the competencies underlying the evaluation rubric. Given the wide scope of learning required for the typical teacher to begin to improve competencies, the team reasons that the TL will need to spend considerable time with teachers, alone or in groups, to have an impact on them. The team tentatively decides that there should be 13 hours per week for the TL role, with 11 hours (85%) of those during school hours. The team then tackles affordability: will the district budget be sufficient to cover the 11 hours per week of release time for the TL? And will this be sustainable in the long run so that the TL role can continue? After an analysis of these questions, the team decides that 13 hours per week is affordable.

The team then ponders how many hours (or periods), on average, the TL should be expected to spend on each task in a typical week. They decide to allocate the TL time as shown in Table 3 (example below).

Table 3. Time Allocation for the TL Role

Task	Time allocation	
	Periods	Percentage
Teaching	20 per week	53
Teaching preparation	5 per week	13
TL tasks		
Model and coach the use of classroom- and school-based data to identify opportunities to improve instruction	3 per week	8
Engage in the development, implementation and evaluation of job-embedded professional development	3 per week	8
Support teacher learning teams	4 per week	11
Participate in meetings with school leadership team outside of the normal school day	3 per week	8
Total periods	38 per week	100
Total release time	11 per week	31

8. What Will Be the Final Role Description and Approval for It?

The major tasks, subtasks, total hours and hours allocated to each major task will be written into a role description. This document will have many uses, including developing staffing and training plans for the role and serving as a basis for discussion between the principal and the TL.

The project team signs off on the role description. The director of curriculum and instruction and the superintendent must also approve.

9. How Will the Role Description Be Used for TL Staffing and Training?

The TL role description can be used to help determine qualifications for the role, develop an identification plan and identify training necessary for the newly hired TL (Heneman, Judge & Kammeyer-Mueller, 2015).

In terms of staffing, qualifications for the TL role should address the knowledge, skills, abilities and other characteristics necessary to successfully perform the job. This may include training and experience requirements, as well as requirements related to teaching effectiveness. Any licensing or other legal requirements should also be included.

The qualifications should then serve as a guide to develop an identification plan. In this plan, each qualification is considered separately, with an indication of whether it is necessary at the time of hire or can be acquired once the person is on the job. For qualifications required at the time of hire, the method by which they will be assessed during the recruitment/identification process must be determined. The assessment methods could range from specific experience requirements to knowledge or ability tests to work samples (such as instructional delivery, coaching, providing feedback).

Qualifications not necessary at the time of hire should then be targeted for training and development. Here it will be necessary to figure out which training and development should be provided to the new hire prior to beginning the TL role, as opposed to once the person is on the job. From this basic decision point, training and development plans can be drawn up.

10. What Should Be Included in a TL Appointment Letter?

The TL appointment letter specifies the terms of the appointment for a newly hired TL. It is similar to a job offer letter and indeed should be included with any formal job offer. Casual or unwritten “shared understanding” job offers and appointment agreements are discouraged. It is best to indicate the terms of employment up front to avoid possible misinterpretation and controversy later on (Heneman, Judge & Kammeyer-Mueller, 2015).

Following is a list of factors to consider placing in the TL appointment letter (others can be added):

- Job title
- Length of appointment (starting and ending dates) and renewal possibilities
- Hours each week (or percentage appointment) to be spent on TL tasks (i.e., release time) during and outside school hours
- Supervisor
- Major tasks and subtasks, including time to be spent on each
- Released time and the weekly TL schedule, including replacement
- Vacation and summer hours expectations
- Compensation: stipend or addition to base salary, amount, retirement credit
- Supplements to be provided (e.g., training materials budget, travel allowance)
- Performance evaluation: performance standards/criteria, evaluator(s), process
- Possible career progression

The examples above describe a coherent process for creating TL roles. Once the district has addressed the 10 key decision points, it will have carefully defined and crafted TL roles with clear requirements and expectations that will drive instructional improvement. The TL role description and letter of appointment will be useful to many—the TL, other teachers, the principal and the TL supervisor—over the course of the TL appointment.

References

Heneman III, H.G., Judge, T.A. & Kammeyer-Mueller, J.D. (2015). *Staffing organizations, 8e.* Mishawaka, IN, and New York: Pangloss Industries and McGraw-Hill Education.

Ohio Department of Education. (2017). *Ohio Teacher Leadership Framework*. Retrieved from http://education.ohio.gov/getattachment/Topics/Teaching/Educator-Equity/Educator-Equity-in-Ohio/Local-Equity-Plan-1/Local-Equitable-Access-Strategies/Ohio-Teacher-Leader-Framework_508_compliant.pdf.aspx?lang=en-US

This document was adapted from “Guide to Creating Teacher Leader Positions” by H. Heneman III, A. Milanowski and M. Finster (2016).