

*Lessons for Aspiring Principals
about*

Instructional Leadership Time

From the National SAM Innovation Project

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Making Time



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Credits and Acknowledgements

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Overview of the Program

Making Time is a series of nine lessons in three strands (themes) that seek to educate aspiring and sitting principals on how and why to increase the percentage of time they spend on instructional leadership, rather than management tasks.

Why the Program was Developed

The National SAM Innovation Project, funded by the Wallace Foundation 2002-2009 and now an independent non-profit, has added to the growing research base that shows that when principals spend more time on instructional leadership (rather than management tasks), student achievement improves. The SAM project has also developed and tested tools and practices that result in increased instructional time for the principal. Contributing factors in increasing instructional time include training to develop awareness and skills on the part of the principal, the use of time tracking tools, regular reflection on time use and other practices.

The *Making Time* module takes the information that was learned in the National SAM Innovation Project and makes it available to anyone who is training aspiring principals and existing principals. The goal is to reach as many leaders as possible and help them learn how to increase their instructional time. The skills and knowledge taught in this program have been shown by the National SAM Innovation Project research to make measureable differences in student achievement.

Audience

The primary audience for *Making Time* is aspiring principals in educational leadership preparation programs. The program is provided as a resource for faculty in these programs, who may incorporate all or part of the program into one or more courses in their curriculum. The program has been deliberately designed so that it is flexible and can be used in many different ways in educational leadership programs across the country. Faculty may choose to use just a single lesson from the module—or even just part of a lesson, or they may choose to incorporate most or all of the lessons into their leadership preparation program.

Secondary audiences for this module include sitting principals and superintendents. Professional developers can use all or parts of the nine lessons to increase awareness of the importance of instructional leadership time and ways to increase it.

How the Program is Organized

As shown in the diagram below, the program is organized into three strands:

- **Strand 1: Prioritizing Time** helps participants make the connection between the research base on instructional leadership and the ways principals spend their time. They are taught how to use a time tracking tool to categorize principal time use and how to increase the amount of time spent on instructional leadership.

- **Strand 2: Influencing Norms** addresses the culture and climate of the school and district. Participants learn how to assess the expectations of various stakeholders as they relate to principal time use, other factors that impact the culture, and how to lead culture change to support increased instructional leadership time.
- **Strand 3: Developing Self** helps participants to explore their own assumptions, values and beliefs about time use and priorities. Participants complete exercises that help them resolve some of the conflicting beliefs they may have (e.g., I believe in spending time on instructional leadership, but I also believe in being available when there are building issues).



In addition, each strand has three lessons:

- The **Introduction** lessons focus on building basic knowledge and beliefs.
- The **Development** lessons provide exercises that help participants apply the knowledge to the job of principal.
- The **Application** lessons provide suggestions for tying the learning to in-school observation and interviews, as well as internships.

What is Included in the Materials

The *Making Time* module includes the following:

In this document:

- Descriptions of each lesson
- Lesson plans for the instructor
- Worksheets for activities

At the website, <http://goo.gl/gqQ5j>

- PowerPoint slides for each lesson
- Videos to support the lessons
- SAM resources

In addition, there are some external resources (primarily articles) that must be accessed from the Internet. These are listed in this guide with links provided. As with any web links, the instructor should make sure all the links are functioning properly prior to giving them to the students.

How to Adapt the Materials

As stated above, the intention of *Making Time* is to provide materials that can be used in a variety of different situations. While the nine lessons in the module are presented in a logical order, faculty members and professional developers are encouraged to adapt the materials and strategies to meet the needs of their students. Instructors may choose to use only certain lessons, to change the order of lessons or to skip parts of lessons. Therefore, the first thing that needs to be done is to read through the entire packet and determine how these materials can improve your current efforts.

This planning is best done by the whole faculty. For example, a faculty group at a university may choose to incorporate lesson 1.1 and 1.2 in one course, parts of lessons 2.1 and 2.2 in another course, and 1.3, 2.3, and 3.3 in their internship component. Similarly, a professional development organization may choose to incorporate lessons into existing training workshops or to offer *Making Time* as its own series of workshops.

For More Information

For more information on the *Making Time* instructional materials or the SAM program, contact:

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Strand One: Prioritizing Time

1.1 Introductory Lesson

What is the difference between instructional leadership time and management time, and why should a principal care?

Context

Strand 1 Lesson 1 This is the first lesson in the series, and so it sets the context for the remainder of the lessons.



Purpose How do principals spend their time? Does it make any difference? Some principal time is spent leading instructional improvement at the school. For example, principals observe teachers and give them feedback, facilitate professional development opportunities and provide structure for getting the most from common planning sessions. Other principal time is spent on management duties, such as supervising grounds maintenance, monitoring drop off/pick up procedures and keeping textbook inventory organized. In this lesson, aspiring principals learn why it is important for principals to be aware of how they are spending their time and to prioritize spending time on activities that have the greatest positive impact on student learning.

Description This lesson includes a review of research on the effects of various principal activities on student achievement and how to discriminate leadership tasks from management tasks. Participants discuss this research and apply it to a case study.

- Objectives** Discriminate instructional leadership activities from management activities.
Identify principal tasks that have the greatest impact on student achievement.

Preparation

Materials

Pre-reading articles:

- Leithwood, K., Seashore Louis, K., Anderson, S., & Wahlstrom, K. (2004). *Executive summary: How leadership influences student learning*. Minneapolis, MN: University of Minnesota Center for Applied Research and Educational Improvement. <http://www.samsconnect.com/makingtime/html/content/executivesummary.pdf>
- Waters, T., Marzano, R., & McNulty, B. (2003). *Balanced leadership: What 30 years of research tells us about the effect of leadership on student achievement*. Minneapolis, MN: University of Minnesota Center for Applied Research and Educational Improvement. <http://www.samsconnect.com/makingtime/html/content/balancedleadership.pdf>
- National College for School Leadership. (2007). *What we know about school leadership*. Nottingham, UK. <http://www.samsconnect.com/makingtime/html/content/whatweknow.pdf>
- SAM external/independent research summary www.SamsConnect.com

Homework article:

Walker, J. (2009). Super Heroes or SAMs? A Change in Practice for a New Kind of Educational Leader. *NCPEA Education Leadership Review*, 10 (1). <http://www.samsconnect.com/makingtime/html/content/superheroes.pdf>

Handouts in this document:

- Reading Assignment: Principal Time Use & Why It Matters (page 14)
- Information: The School Administration Manager (SAM) Project (page 15)
- Information: Coding Time for Time/Task Analysis (page 17)
- Worksheet: Categorizing Principal Tasks (page 22)
- Assignment: The Reality of Principal Time (page 23)
- Video: Principal Beth Thompson <http://www.samsconnect.com/?p=1134>

Note: Throughout this document, all page numbers are hyperlinks. Therefore, if you are viewing this document in MS Word, you can Ctrl-click on the page number and automatically go to the corresponding page. For example, if you Ctrl-click on the number “14” in the first bullet above, you will jump to page 14, where you’ll see the reading assignment “Principal Time Use & Why It Matters. To automatically update all such links in a document, click Ctrl-A, then click F9.

Handouts on the website (Click Link):

- Leddick, S. (2006). *Summary of balanced leadership findings for principals*. Johnston, IA: Heartland AEA Adapted and re-grouped by Susan Leddick for Heartland Area Education Agency. <http://www.samsconnect.com/makingtime/html/content/balancedleadershipfindings.pdf>
- The Principal Story: Background and Conversation Guide: School Administration Manager (SAM). www.wallacefoundation.org/principalstory

Video on Website

- Coding Principal Time http://www.samsconnect.com/makingtime/html/content/making_time_dvd.m4v
- The Principal Story: Sam I Am http://www.samsconnect.com/?page_id=35
- Principal Beth Thompson <http://www.samsconnect.com/?p=1134>

PowerPoint files:

- Making Time Overview http://www.samsconnect.com/makingtime/html/content/Making_Time_Overview.ppt
- Making Time 1.1 http://www.samsconnect.com/makingtime/html/content/Making_Time_1-1.ppt

Professor Preparation

Distribute the prereading assignment. See *Reading Assignment: Principal Time Use & Why It Matters* on page 14. NOTE: You may distribute copies of the articles with the assignment or ask participants to access the articles on line. If you do the latter, make sure that the web links on the sheet are still active and correct.

Read the articles and develop your own set of answers to the questions on the assignment sheet.

Student Preparation

Complete the *Reading Assignment: Principal Time Use & Why It Matters* on page 14.

Instructional Sequence

**Presentation:
Introduction to
the Topic (0:20)**

Ask participants to brainstorm a list of demands on a principal's time. Then, ask them to brainstorm a list of what a principal would spend time on in an ideal situation.

Provide an overview of the lessons related to time management. You may use/adapt the [PowerPoint file, *Making Time Overview*](#) for this purpose.

Show the video: Principal Beth Thompson.

(<http://www.samsconnect.com/?p=1134>) Discuss video. Show attendees how to access video of Principal Thompsons SAMs.

(<http://www.samsconnect.com/?p=1134>)

**Discussion:
Prereadings (1:00)**

Use the [PowerPoint file, *Making Time 1.1*](#) (on CD) to facilitate the lesson.

Divide the class into groups and ask each group to discuss one of the question sets from [Reading Assignment: *Principal Time Use & Why It Matters*](#) (on page 14). After time for small group discussion, ask each group to report out on its answers.

Class discussion: Ask aspirants to discuss readings and (1) define instructional leadership and (2) identify principal tasks that have greatest impact on student achievement.

Distribute the [handout *Summary of balanced leadership findings for principals*](#) (from the Internet) which provides a list of practices associated with each of the factors identified in the *Balanced leadership* article.

**Discussion:
Instructional
Leadership (0:20)**

Facilitate a discussion in which the aspirants (1) define instructional leadership and (2) identify principal tasks that have greatest impact on student achievement.

**PBS Video
Discussion (0:30)**

Explain that this series of lessons on principal time is based, in part, on lessons learned from research coming from a national project funded by the Wallace Foundation (and in one of the prereadings).

Distribute the [handout *The Principal Story: Background and Conversation Guide: School Administration Manager \(SAM\)*](#) (on CD). Go over the background information, then show the [The Principal Story](#) (http://www.samsconnect.com/?page_id=35). It is 15 minutes long.

Discuss selected conversation questions from the handout.

Big Ideas

Through the previous two discussions or in summary comments, make sure that the following big ideas are discussed (they are summarized in the PPT and in full form here):

- The way principals use time DOES matter.
- Spending time on instructional leadership leads to statistically significant improvements in student learning. A large and growing body of research provides evidence of this.

- Tasks that result in student improvement—what we’re calling instructional leadership tasks—revolve around setting direction, developing teacher, parent and student efficacy and building the school context.
- Because there are so many demands on a principal’s time, effective leaders must learn to be reflective and deliberate about how they use their time.
- This is not an attempt to demonize management or to suggest that management activities are not important. Obviously, making sure that school facilities and programs are not double-booked is important. The problem is that many principals spend too much time “in the weeds” taking care of pressing management demands and not enough time on instructional leadership tasks.

**Preparation
Assignment for
Next Lesson
(0:10)**

Distribute the following handouts:

- **Handout:** Information: The School Administration (SAM) Project (see page 15)
- **Handout:** Information: Coding Time for Time Task Analysis (see page 17)
- **Handout:** Worksheet: Categorizing Principal Tasks (see page 22)
- **Handout:** Assignment: The Reality of Principal Time (see page 23)

Explain that there is an organization called the National SAM Innovation Project that has spent time determining how to discriminate and measure different types of principal time. The first part of the homework assignment will be to read some information about how the SAM program codes time use and apply it to a listing of principal activities.

Briefly introduce the content on time coding.

Explain that the reading assignment extends the content from this lesson to address the corollary question which will be discussed in the next lesson: *What is the difference between how principals should spend their time and how they actually spend their time?*

Follow Up

**Reinforcement
Ideas**

In lessons/courses that focus on instructional leadership, refer back to the articles from the lesson prereading and ask aspirants to relate what they are learning to the activities that research shows make the most difference in student achievement.

Reading Assignment: Principal Time Use & Why It Matters

Lesson 1.1

Directions: Read the articles listed below and jot down notes related to the questions for each reading. Note that some of these articles include information on *characteristics* of effective leaders. While this information is important, it is not our focus right now. Please focus on content related to actions principals take that make a difference.

Leithwood, K., Seashore Louis, K., Anderson, S., & Wahlstrom, K. (2004). *Executive summary: How leadership influences student learning*. Minneapolis, MN: University of Minnesota Center for Applied Research and Educational Improvement. <http://www.samsconnect.com/makingtime/html/content/executivesummary.pdf>

Waters, T., Marzano, R., & McNulty, B. (2003). *Balanced leadership: What 30 years of research tells us about the effect of leadership on student achievement*. Minneapolis, MN: University of Minnesota Center for Applied Research and Educational Improvement. <http://www.samsconnect.com/makingtime/html/content/balancedleadership.pdf>

Question Set One: The authors state that evidence leads to three conclusions about how successful leadership influences student achievement: 1) Most leaders contribute to student learning indirectly, through their influence on other people or features of their organizations; 2) the evidence provides good clues about who or what educational leaders should pay the most attention to within their schools; 3) we need to know much more about what leaders do to further develop these high-priority parts of their organizations.

What are some indirect things that principals do to influence student achievement?

Who and or what do some educational leaders pay attention to in their organizations that influence student achievement?

Question Set Two: The authors state that there are three sets of practices that make up the basic core of successful leadership: setting directions, developing people and redesigning the organization.

Give examples of how principals set directions for schools.

Give examples of how principals develop teacher efficacy, instructional practice.

Give examples of how principals redesign the organization.

Question Set Three: The Marzano article includes a chart differentiating first and second order changes. What is the difference between first order change and second order change, and why do the authors make this distinction?

What is the difference between the types of practices needed for first order change and those needed for second order change?

National College for School Leadership. (2007). *What we know about school leadership*. Nottingham, UK. <http://www.samsconnect.com/makingtime/html/content/whatweknow.pdf>

Question Set Four:

According to NCSL, what practices and characteristics form the basics of successful leadership?

Are there significant differences between these tasks and those identified by Leithwood et al. and Waters et al?

Information: The School Administration Manager (SAM) Project

Lesson 1.1 homework

Lesson 1.2 discussion

What is SAM?

SAM is a professional development process using a unique set of tools to change a principal's focus from school management tasks to instructional leadership—activities directly connected to improving teaching and learning.

Does it work?

Yes. Independent and external research has determined that principals gain the equivalent of 27 extra days of instructional leadership time in their first year using the SAM process. (PSA, 2011) By the third year the gain of instructional leadership time exceeds 55 days. The process is designed to help the principal be reflective about how to best work with teachers to improve teaching and learning.

How do you know how a principal spends time?

The SAM process uses a unique data collection process called Time/Task Analysis™ to determine how much instructional, management and personal time a principal uses. The principal is “shadowed” for five days with data collected every five minutes. This creates a time use baseline. The principal then uses TimeTrack™ to begin increasing instructional time each day. The shadowing is repeated annually as an external check on progress.

What is a SAM?

A SAM is a person or team of staff members who meet with the principal each day to schedule instructional leadership time, reflect on impact and develop a First Responder™ structure in the school. Some schools elect to hire a new staff member for this role. Many use existing staff, usually a secretary, principal or teacher leader. Most schools use a team approach, for example: a secretary and assistant principal. *SAM: School Administration Manager*

First Responders™?

The life of most school leaders is interrupt driven. The SAM process identifies staff members who should be the first to try to deal with management issues instead of immediately pulling the principal from instructional work. The SAM team works to create management systems within the school to manage the management so the principal can stay engaged in activities designed to improve teaching and learning. NSIP surveys of parents, students and staff at SAM schools reveal that the management is better accomplished when the First Responders™ system is in place and the principal increases instructional engagement.

TimeTrack™ ?

TimeTrack is a cloud based calendar that the principal uses like a lesson plan. The calendar tracks the time the principal spends with individual and groups of teachers and provides specific detail of the interactions. TimeTrack records and charts are used in a daily meeting with the principal and SAM team to determine next steps and track time use.

How was the SAM process created?

The Wallace Foundation funded the initial work. Mark Shellinger, a former teacher, principal and superintendent, created the process and tools. The initial pilot showed promising results and a positive correlation with student achievement. The Foundation supported replication, development and

research for nine years. Mark now directs the National SAM Innovation Project (NSIP), a non-profit corporation providing SAM implementation and support services for more than 500 schools in seventeen states on a fee for service basis.

Is the SAM process expensive?

No. NISP contracts with districts and schools at an annual rate, or fee, that declines each year as capacity is developed locally. SAM is not a program. It is a professional development process a principal uses to do the good work the school and district has determined will best help students. The first year fee for a school is \$12,900 and includes services for the principal, assistant principals and SAM team members. This fee decreases by 30% each year as capacity is developed at the school and district level.

What services are included?

NSIP starts with a readiness training workshop for the principal and SAM team. Once the school community and principal have completed the readiness steps, Time/Task Analysis™, or shadowing, is conducted for one week. NSIP then provides two weeks of on-site training and support to implement TimeTrack, the daily meeting and First Responders. NSIP continues this support with monthly visits by a Time Change Coach and professional development support. The annual service fee also covers all expenses for the SAM team, except airfare, to attend the NSIP annual national conference.

How can my school or district begin the SAM process?

Start with a visit to the NSIP website, www.SamsConnect.com Then, view video interviews with SAM principals and teams and take a look at the research reports. Click on the **Contact Us** link to schedule an implementation planning session.

For information: www.SamsConnect.com

Information: Coding Time for Time/Task Analysis

Lesson 1.1 homework

Lesson 1.2 discussion

Introduction. In 2002 the Alternative School Administration Study, ASAS, created a system to quantify how principals spend their time as a starting point for leaders to begin a process to increase time spent on instructional leadership. Time/Task Analysis© *artificially* separates everything a principal does into three categories: actions that are **primarily instructional**, actions that are **primarily managerial** and actions that are **primarily personal**. Since most everything a leader does in a school has some connection or impact to student learning, qualifying the action or activity with the word “primary” makes it possible to categorize.

Categorizing activities. The tool provides data collectors a clear method of sorting principal actions or activities into the three categories. Personal activities/actions are easy for the data collector to identify. Separating management for instructional is harder. As a starting point, assume that anything the principal is doing is management unless there is evidence of CIA: curriculum, instruction or assessment. The principal’s action must be specifically connected to CIA, or teaching and learning, to be coded as instructional.

Choosing a descriptor. Once the data collector has determined the category, a descriptor is selected from the list on the following page. The descriptor *refines* the kind of management or instructional activity in which the principal is engaged. For example, a principal who is asking a teacher to include a small group activity in a lesson would be categorized as engaged in “**2**”, *Instruction*. The correct descriptor is “**C**”, *Employee Supervision*, as the principal is advising the teacher on an instructional issue.

Identifying an interaction code. The last step for the data collector is to code how the principal is interacting. Since the principal is talking with only one teacher the correct interaction code is “**3**”, *interaction, individual*. Hence, the correct coding for the example is **2/c/3**.

Repeat every five minutes. The data collector repeats this process every five minutes capturing a detailed picture of how the day and week are spent.

Practice makes perfect. Reaching consistency can be difficult. Consider the example of the principal telling a teacher to include a small group learning activity in a lesson. If the action is slightly changed the data collector would have to select a different descriptor.

Look at the three variations below. Each would cause the data collector to select a different descriptor:

- Principal talks with a teacher about a lesson he/she observed and asks if there would have been value in adding a small group activity. *The correct descriptor is “F”, Feedback, because the principal isn’t giving a direction. He/she is asking the teacher to be reflective about practice.*
- Principal tells a teacher how impressed he/she is with the teacher’s use of small group activities in lessons. *The correct descriptor is “N”, Celebration, since the principal is congratulating the teacher.*
- Principal writes a note to a teacher about the value of adding small group activities in a lesson. *The correct descriptor is “D”, Office Work, Prep., since the principal is preparing instructional feedback, not actually giving it to the teacher.*

Information: Coding Time for Time Task Analysis (cont.)

Lesson 1.1 homework

Lesson 1.2 discussion

1. Management

- a. student supervision
- b. student discipline
- c. employee supervision
- d. employee discipline
- e. office work/prep
- f. building management
- g. parents/guardians
- h. decision making committees, groups, meetings
- i. district: meetings, supervisors, others
- j. external: officials, others
- k. celebration

2. Instruction

- a. student supervision
- b. work with student(s)
- c. feedback: directive
- d. office work/prep.
- e. observation, walk through
- f. feedback: non-directive
- g. parents/guardians
- h. decision making committees, groups, meetings
- i. district: meetings, supervisor, others
- j. external: officials, others
- k. teaching/modeling
- l. professional development
- m. planning, curriculum, assessment
- n. feedback: celebration

3. Personal (lunch, breaks, restroom, errands, personal business)

Interaction Types

1. telephone
2. computer
3. interaction, individual
4. interaction, group
5. read/write/think

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ASAS Time Task Descriptor Examples

1. MANAGEMENT	A FEW EXAMPLES
a. Student supervision	➤ Cafeteria, lunchroom, hallway
b. Student discipline	➤ Behavior management
c. Employee supervision	➤ Monitoring or working with classified staff—secretaries, instructional assistants, clerks, custodians, bus drivers, cafeteria workers, etc. ➤ Non-instructional work with certified staff
d. Employee discipline	➤ Direction tied to contract, work rules, warning
e. Office work/prep	➤ Copying or searching for materials-setting agenda- working at computer-working with SAM
f. Building management	➤ Maintenance, cleaning and safety
g. Parents/guardians	➤ Student attendance/illness ➤ Non-instructionally focused
h. Decision making committees, groups, meetings	➤ Site based committees, meetings ➤ Formal and informal decision making and advisory discussions with students or adults
i. District: meetings, supervisors, others	➤ Meeting with district personnel regarding building issues
j. External: officials, others	➤ Fire marshal, child protective services, community groups
k. Celebrations	➤ Adult focused, non-instructional ➤ Non-instructional w/students example: birthday
2. INSTRUCTION	A FEW EXAMPLES
a. Student supervision	➤ In-classroom instructional assistance, simply supervising students while instruction is in process or students are working
b. Work with student(s)	➤ One-on-one or in small groups—talk is directly related to learning
c. Feedback: directive	➤ Direction about instruction
d. Office work/prep	➤ Reviewing lesson plans ➤ Preparing instructional feedback, evaluations, etc. ➤ Preparing for an instructionally focused meeting
e. Observation, walkthrough	➤ Moving from room to room: appears to be observing, taking data or notes ➤ Observing instruction, 15 minutes or longer, appears to be taking notes ➤ Monitoring climate in instructional places
f. Feedback: non-directive	➤ Giving instructional feedback on lesson, unit, PD, etc. ➤ Giving instructional coaching
g. Parents/guardians	➤ Conversations regarding instruction
h. Decision making committees, groups, meetings	➤ Instructional discussions ➤ Receiving feedback on curriculum, instruction and/or assessment issues
i. District: meetings, supervisor, others	➤ Topic/discussion directly tied to instruction, assessment, curriculum, content
j. External: officials, others	➤ Topic/discussion directly tied to instruction, assessment, curriculum, content
k. Modeling/teaching	➤ Teacher needs to be in room observing
l. Professional development	➤ Formal PD presentation, participation
m. Planning, curriculum, assessment	➤ Meetings with individuals or groups: specific to instruction

	➤ Studying curriculum or assessment documents
n. Feedback: celebration	➤ Student or adult focused: directly tied to instruction or achievement
3. PERSONAL	A FEW EXAMPLES
(no subcategories)	<ul style="list-style-type: none"> ➤ Lunch or restroom breaks ➤ Errands for personal business ➤ Personal phone calls

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For specific definitions and examples for the eleven management descriptors, click the following link: <http://www.samsconnect.com/wordpress/wp-content/uploads/2011/11/Management-Descriptors.pdf>

For specific definitions and examples for the fourteen management descriptors, click the following link: <http://www.samsconnect.com/forms/3%20column%20descriptor%20examples.pdf>

Worksheet: Categorizing Principal Tasks

Lesson 1.1 homework

Lesson 1.2 discussion

Directions: For each item listed below, designate those items that would be management items with a “1” AND instructional leadership with a “2”.

1. ___ Student supervision in the cafeteria during lunch
2. ___ Meeting with 2nd grade teachers to create common reading assessments
3. ___ Disciplining a student for running in the hall
4. ___ Discussion of being late to work with an employee
5. ___ Reviewing test scores at your computer
6. ___ Completing a work order for a maintenance item
7. ___ Giving feedback to a teacher about your classroom observation
8. ___ Participating in an IEP meeting for a student
9. ___ 5th grade teachers meeting to review a common assessment
10. ___ Meeting with the district’s Foodservice Director
11. ___ State Fire Marshall’s inspection visit
12. ___ Announcing the day’s birthdays during the announcements
13. ___ Supervising a classroom until the teacher gets there
14. ___ Working with student(s) on a math project
15. ___ Discussing with a teacher how to implement the IEP after the IEP meeting
16. ___ Conducting an observation walk-through in a classroom
17. ___ Working on a new parking plan for the school parking lot
18. ___ Checking on a window repair
19. ___ Meeting with parents about their child’s discipline issue
20. ___ Attending a district reading team meeting to address new textbooks
21. ___ Working with the PTO Exec Board about Patriot’s day lunch
22. ___ Meeting with state officials about the upcoming state accreditation visit
23. ___ Teaching a class so that the teacher can watch a specific teaching technique
24. ___ Preparing a professional development activity for the faculty meeting
25. ___ Having lunch with the students who read the most books for the week
26. ___ Reviewing the emergency evacuation plans for the building
27. ___ Attending a school board meeting to get the school handbook approved
28. ___ Reviewing student suspension records
29. ___ Meeting with new staff members and their mentors to discuss feedback visits
30. ___ Meeting with a textbook salesperson about a new Science text
31. ___ Meeting with a student to discuss a lesson that a teacher presented
32. ___ Meeting with a substitute teacher to discuss her class schedule for the day
33. ___ Planning for the parent night open house
34. ___ Conducting an evaluation observation of a teacher
35. ___ Completing a survey on-line from your state professional organization
36. ___ Creating a power point for the next faculty meeting about the new evacuation drills

Reflect: Is there a better way to get the management tasks done—perhaps by another person? Which of the tasks in the above list have the greatest effect on student achievement, according to research?

Assignment: The Reality of Principal Time

Lesson 1.1 homework

Lesson 1.2 discussion

Directions, Part I: Using the handouts below, read about how to categorize time according to the SAM project, then complete the worksheet.

- Information: The School Administration (SAM) Project
- Information: Coding Time for Time/Task Analysis
- Worksheet: Categorizing Principal Tasks

Directions, Part II: Read the article listed below and jot down notes related to the questions below.

Walker, J. (2009). Super Heroes or SAMs? A Change in Practice for a New Kind of Educational Leader. *NCPEA Education Leadership Review*, 10
(1). <http://www.samsconnect.com/makingtime/html/content/superheroes.pdf>

What is the difference between the principal as manager and the principal as leader?

What are some of the barriers to principals spending time on instructional leadership?

According to the ASAS data, what do most principals learn when they start tracking how they spend their time?

What are some strategies that principals in the SAM project use to increase their own awareness of time usage?

General Reflection Questions: In your experience, how do most principals spend their time? Do they spend most of their time performing tasks that increase student achievement, according to the research? If so, then how are some of the more mundane management tasks being handled? If not, then how can they more efficiently handle their management responsibilities so they have more time for instructional leadership?

Strand One: Prioritizing Time

1.2 Development Lesson

What is the difference between how principals should spend their time and how they actually spend their time, and what needs to change?

Context

Strand 1 The first lesson provided a research basis to help participants see that there are defined leadership tasks that principals can perform that make a difference in student learning. This lesson continues to focus on general concepts related to time management, but it gets more specific in classifying activities.

Lesson 2



Overview

Purpose Most principals—current and aspiring—believe in the importance of instructional leadership, even though they may be a little fuzzy on the definition of *instructional leadership*. Despite their desire to be instructional leaders, however, most principals still spend the majority of their time juggling administrative demands. Why? What do principals need to do to increase the amount of time they spend on instructional leadership, without staying until midnight?

Description This lesson includes a review of leadership and management tasks and a thorough discussion of the homework related to discriminating the different types of activities. Further practice is offered via a video. Aspiring principals then extend that work by discussing which tasks should be deleted, delegated, increased or enhanced. Distributed management is discussed as a framework for increasing instructional leadership.

Objective Identify how principals spend their time and how they *should* spend their time.

Preparation

Materials

Pre-reading article:

- Walker, J. (2009). Super Heroes or SAMs? A Change in Practice for a New Kind of Educational Leader. *NCPEA Education Leadership Review*, 10 (1). <http://www.samsconnect.com/makingtime/html/content/superheroes.pdf>

Homework articles:

- Marshall, Kim. (2008). The big rocks: priority management for principals. *Principal Leadership*, March, 2008. <http://www.samsconnect.com/makingtime/html/content/timemanagement.pdf>
- Holland, H. (2008). *Out of the office and into the classroom: an initiative to help principals focus on instruction*. Seattle, WA: Center for the Study of Teaching and Policy, University of Washington. <http://www.samsconnect.com/makingtime/html/content/storiesfromfield.pdf>

Handouts in this document:

- *Worksheet: First Responder Self Assessment* (on page 32)
- *Worksheet: Getting More Bang for the Buck: Management* (see page 30)
- *Worksheet: Getting More Bang for the Buck: Leadership* (see page 31)

Video on Website

- Coding Principal Time
Video http://www.samsconnect.com/makingtime/html/content/making_time_dvd.m4v

PowerPoint files:

- Making Time
1.2 http://www.samsconnect.com/makingtime/html/content/Making_Time_1-2.ppt

**Professor
Preparation**

If you did not do so at the end of lesson 1.1, distribute the [prereading assignment *Assignment: The Reality of Principal Time*](#) (on page 23). NOTE: You may distribute the article with the assignment or ask participants to access the article on line. If you do the latter, make sure that the web link on the sheet is still active and correct.

Read the articles and develop your own set of answers to the questions on the assignment sheet.

Screen the video and identify which clips you want to use. Generally, it is recommended that you show all 20 clips.

**Student
Preparation**

Complete [Assignment: The Reality of Principal Time](#) on page 23.

Instructional Sequence

**Discussion:
Homework**

Note: Use the [PowerPoint file, *Making Time 1.2*](#) to facilitate the lesson.

Follow-up (0:55)

Review definitions and examples of management tasks and leadership tasks.

Refer to the assignment, [Worksheet: Categorizing Principal Tasks](#) (on page 22). (Participants should have completed this prior to coming to class.)

Discuss the items and make sure that students are clear about the difference between management tasks and leadership tasks, as explained on page 17. Discuss subtle differences. For example, #8, participating in an IEP meeting of a student, may be instructional or management. Under what circumstances would it be one or the other?

Discuss the following as a follow-up to the [Jan Walker article *Super Heroes or SAMs? A Change in Practice for a New Kind of Educational Leader*](#) (on Internet). assigned for homework:

- According to the ASAS data, what do most principals learn when they start tracking how they spend their time?
- What are some of the barriers to principals spending time on instructional leadership?
- What are some strategies that principals in the SAM project use to increase their own awareness of time usage?

**Pairs Discussion:
How to Analyze
the Data (0:40)**

Distribute the following handouts:

- **Handout:** [Worksheet: Getting More Bang for the Buck: Management](#) (on page 30)
- **Handout:** [Worksheet: Getting More Bang for the Buck: Leadership](#) (on page 31)

Go over the instructions and facilitate pairs discussion.

As a large group, debrief the discussion.

Instructor's Note: Some instructors prefer to just have the participants complete the exercise using the worksheet, Categorizing Principal Tasks (on page 22) for the above exercise.

**Pairs Discussion:
How to Analyze
the Data (0:40)**

Discuss the idea of having a designated first responder for some common management tasks:

- Delegation of time-intensive management tasks is key.
- Initial team training and ongoing coaching in the SAM project has been refined to emphasize delegation of five identified management tasks.
- “High Delegation” schools (someone other than the principal is the first responder for tasks below) are consistently successful.
- Student discipline
- Student supervision
- Management of non-teaching staff
- Management of school facilities
- Interactions with parents

Facilitate small group discussion of the [First Responder Self Assessment](#) (on page 32).

- Ask aspiring principals to complete it individually, based on their knowledge of their current school. (Note: If they cannot answer the questions, discuss what that means.)
- Ask them to form small groups and discuss:
- What insights did you get from completing the self assessment?
- Who are some possible first responders?
- What will be the easiest of these to implement?
- What will be the most challenging of these to implement?

**Video Practice:
Classifying and
Analyzing Tasks
(2:00)**

Note: The National SAM Innovation Project *uses four video tests to prepare data collectors*. The video, *Coding Principal Time*, provides an explanation of the process and twenty video vignette test questions. Play the video straight through (a little over 40 minutes) and facilitate a discussion afterwards.

Distribute the following [handout Worksheet: Coding Tasks from the video](#) on page 33) and go over the instructions. Emphasize that they should only complete the first three columns (to the left of the double line).

Show the [Coding Principal Time video](#) (http://www.samsconnect.com/makingtime/html/content/making_time_dvd.m4v) and ask aspirants to code the principal's time.

Conduct a debrief of the video.

**Discussion:
Distributed
Management
(0:20)**

Ask participants to recall the readings from lesson 1.1 (particularly Leithwood and the NSCL article).

Discuss the role of distributed management/distributed leadership in increasing time for principal to be instructional leader.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- Most principals believe that instructional leadership tasks are important, but their actions may not show these beliefs; they spend most of their time responding to other demands.
- The simple act of tracking time often leads to many “a-ha” moments, as well as an increased awareness of time and subsequent change in how time is spent—moving toward more instructional leadership time.
- Delegating management tasks and distributing leadership responsibilities are the two keys to gaining time for instructional leadership.
- Any task can be enhanced and brought more into line with instructional leadership (e.g., talking to children about what they are reading when you are supervising the lunchroom); on the other hand, any task can be done in such a way as to minimize its value (e.g., observing the classroom, but without a follow-up conversation or only focusing on minutia).
- Even required “mundane” tasks can become leadership tasks if approached with that mindset.

Follow Up

**Preparation
Assignment for
Next Lesson**

Distribute the following handouts:

- Handout: Assignment: Finding Ways to Make Time (on page 35)
- Homework reading: Marshall, Kim. (2008). The big rocks: priority management for principals. *Principal Leadership*, March, 2008. <http://www.samsconnect.com/makingtime/html/content/timemanagement.pdf>
- Homework reading: Holland, H. (2008). Out of the office and into the classroom: an initiative to help principals focus on instruction. Seattle, WA: Center for the Study of Teaching and Policy, University of Washington. <http://www.samsconnect.com/makingtime/html/content/storiesfromfield.pdf>

Handout: Sample First Responder Sheet, Elementary School http://www.samsconnect.com/makingtime/html/content/bt_firstresponders.pdf

Explain the details of the assignment.

**Reinforcement
Ideas**

In observational assignments that are part of the students' course work, keep them focused on how time is used and whether it is being used for instructional leadership.

Worksheet: First Responder Self Assessment

Lesson 1.2

Directions: Look at the five time-intensive management tasks listed in the left column below. In the shaded columns, indicate how often the principal in your school personally performs each task. In the far right column, indicate the designated *first responder*, if there is one.

Next, add up your scores and look at the key below the chart. What opportunities do you have to reduce the amount of time the principal spends on these tasks?

Task	How often is the <i>principal</i> the first responder?				Name of the Designated First Responder
	Never (3)	Rarely (2)	Sometimes (1)	Usually (0)	
Student supervision, non- instructional areas of the school					
Student discipline, behavior management					
Supervision of non-teaching school staff					
School facilities: maintenance, scheduling, cleaning					
Interaction with parents on non-instructional matters					

Total points = _____

13-15 points Best! Your school is right where you need to be in delegating management tasks.

9-12 points Good! Your school is making progress.

0-8 points Oh no! Your school should rethink who is the first responder for these time-intensive management tasks.

Worksheet: Coding Tasks from the video

Lesson 1.2

Class Directions: Watch the 30-second segments on the video and complete the columns in the chart below first three columns, as follows:

- Reference: Jot down some details about each clip (e.g., “talking to boy about running in halls”) so that you can recall the clip.
- Cat: Write the *category* of behavior: management (“M”) or instructional leadership (“I”).
- Desc.: Write down one description type for each clip. Use the descriptors on the handout sheet from lesson 1.1, *Information: Coding Time for Time/Task Analysis*.

Homework Directions: Complete the last two columns, as follows:

- Action: Choose either *delete*, *delegate*, *increase* or *enhance*. *Delete* means that it is wasted time and the task does not have to be done. *Delegate* means that somebody else could do this task and it would be better for the school if the principal were doing something else. *Increase* means the principal should spend more time on this activity (or others like it). *Enhance* means that the principal could get greater value from the task by doing it differently (e.g., using a team meeting to talk about curriculum instead of hallway etiquette).
- Details: This is a place to write your thoughts and take notes from others about the suggested action for the activity.

#	Reference	Cat.	Desc.	Action	Details
1					
2					
3					
4					
5					
6					
7					
8					

#	Reference	Cat.	Desc.	Action	Details
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Assignment: Finding Ways to Make Time

Lesson 1.2

Directions, Part I: Complete the last two columns on the worksheet: *Coding Tasks from the video*.

Directions, Part II: Read the article and then complete the chart from two perspectives—one that focuses on how you can better use your time *right now* and one that has you envision yourself as a principal. Also, using the rubric in the article:

Reading: Marshall, Kim. (2008). The big rocks: Priority management for principals. *Principal Leadership*, March, 2008. http://www.samsconnect.com/makingtime/html/content/Making_Time_2-1.ppt

Questions:

- Complete the time management rubric for yourself. This will take some flexibility and creative thinking on your part, as it is written for sitting principals.
- Complete the time management rubric for a principal you know or have known in the past. Respect that person’s confidentiality by keeping your ratings private.

	In Your Current Job	As a Principal
What are the big rocks?		
What are your expectations for using time well?		
What sort of planning system will you use to get to all your big rocks?		
What will you do when something pressing threatens to keep you from the big rocks? Give a realistic example.		
What could/should you delegate?		

Directions, Part III: Read the article below and answer the two questions below.

Reading: Holland, H. (2008). *Out of the office and into the classroom: An initiative to help principals focus on instruction*. Seattle, WA: Center for the Study of Teaching and Policy, University of Washington. <http://www.samsconnect.com/makingtime/html/content/storiesfromfield.pdf>

Questions:

- What are the key components of the SAM program?
- Based on the research findings from the SAM module, what strategies can a principal implement that do **not** require the resource of a designated school manager?

Strand One: Prioritizing Time

1.3 Application Lesson

What strategies can increase the amount and quality of instructional leadership time for the principal?

Context

Strand 1 Lesson 3 In the final lesson in this strand, aspiring principals take what they've learned about time management and apply it in two ways—coding a real principal's time and then creating a plan for a “typical week in the life of a principal;” that is, a principal who focuses on instructional leadership.



Overview

Purpose In this lesson, participants move from the abstract to application. In schools, they track a principal's time, analyze it and create a weekly plan for time use.

Instructor's Note: In this lesson, challenge their excuses about not having anyone to delegate to.

- Description** The lesson starts with a discussion of the practical lessons that can be gleaned from the *Big Rocks* article. Then the group takes the information from the SAM project and brainstorms ways to achieve the same benefits without spending additional monies. Aspiring principals then learn some of the basics of delegation that will help them accomplish their goals. The strand culminates in a site-based activity where aspiring principals track a principal’s time, analyze it, and create a weekly plan for time use.
- Objectives**
- Demonstrate how to add instructional leadership into all tasks a principal performs.
 - Devise a strategy to increase a principal’s instructional time.

Preparation

- Materials**
- Pre-reading articles:**
- Marshall, Kim. (2008). The big rocks: priority management for principals. *Principal Leadership*, March, 2008. <http://www.samsconnect.com/makingtime/html/content/timemanagement.pdf>
 - Holland, H. (2008). *Out of the office and into the classroom: an initiative to help principals focus on instruction*. Seattle, WA: Center for the Study of Teaching and Policy, University of Washington. <http://www.samsconnect.com/makingtime/html/content/storiesfromfield.pdf>
- Handouts in this document:**
- *Information: Different Models in SAM Project* (page 45)
 - *Information: What to Delegate* (on page 46)
 - *Exercise: What to Delegate* (on page 47)
 - *Information: Five Steps to Effective Delegation* (on page 48)
 - *Exercise: Five Steps to Effective Delegation* (on page 50)
 - *Worksheet: Delegation Self Assessment* (on page 51)
 - *Assignment: Time Coding* (on page 52)
 - *Worksheet: Time Coding* (on page 53)
 - *Assignment: Weekly Calendar* (on page 54)
 - *Worksheet: Weekly Calendar* (on page 55)
- Videos on Website**
- SAM Process Daily Meeting http://www.samsconnect.com/?page_id=35
- PowerPoint files:**
- Making Time 1.3 http://www.samsconnect.com/makingtime/html/content/Making_Time_1-3.ppt

**Professor
Preparation**

If you didn't do so at the end of lesson 1.2, distribute the prereading assignment [Assignment: Finding Ways to Make Time](#) on page 35. NOTE: You may distribute the articles with the assignment or ask participants to access the articles on line. If you do the latter, make sure that the web links on the sheet are still active and correct.

Read the articles and develop your own set of answers to the questions on the assignment sheet.

Optional: Bring in a jar, rocks, gravel and sand to illustrate the big rocks example.

**Student
Preparation**

Complete [Assignment: Finding Ways to Make Time](#) on page 35.

Instructional Sequence

**Discussion:
Homework**

Note: Use the [PowerPoint file, Making Time 1.3](#) (on CD) to facilitate the lesson.

Follow-up (0:45)

Debrief the [Worksheet: Coding Tasks from the video](#) (on page 33). Challenge aspirants to think deeply about why and how certain tasks should be deleted, delegated, increased or enhanced.

Optional: Complete a demonstration of the “big rocks” activity as described in the homework article. You may also want to show what happens when you reverse the order (first sand, then gravel, etc.) You may also use the props to generate a discussion about what each substance represents in their current jobs and in the job of principal (e.g., sand represents emergency requests for data).

Refer to [Assignment: Finding Ways to Make Time](#) (on page 35—participants should have completed this prior to coming to class).

Discuss the questions on the matrix from the homework assignment (and also on a PowerPoint slide). Emphasize that there are learning points here that can transfer to the aspirants' current positions.

Discuss the time management rubric that the aspiring principals completed. What did they learn about themselves? About the job of principal? How would having time track data have helped them to better assess the principal's time management?

Ask each group to report out on their most promising findings. Try to bring out the following ideas:

- The transition to instructional leadership is not natural or easy
- Principals must be deliberate about changing
- It will not work unless the principal is very public about what he/she is trying to do and why
- Even without additional staff, it is essential to have a partner with whom one can discuss the schedule, calendar, and “to do” list each day

- Video:** Creating a First Responder Structure, video: view and discuss http://www.samsconnect.com/?page_id=866
- Video:** Tips on Quality Instructional Feedback, Mike Rutherford, 5th Annual National SAM/Principal Conference, view and discuss http://www.samsconnect.com/?page_id=890
- Small Group Discussion: SAM I Am (0:40)** Distribute the following handout: *Information: Different Models in SAM Project* (on page 45).
- Explain that their homework reading, along with this handout, showed how different structures could be put in place to facilitate the principal putting an increased emphasis on instructional leadership. Even though most schools do not have a SAM available, there are still things we can learn from the project.
- Ask the participants to form small groups and discuss the question: What strategies can a principal implement that do not require the resource of a designated school manager? Encourage them to be creative and to think outside of the usual parameters of “who does what” in a school. Sample ideas include:
- Checklists for annual events such as Family Fun Day
 - Administrative timeline that includes regularly scheduled events throughout the year
 - Checklist of state/district forms and requirements
 - Daily planner template
- Emphasize that we are all constrained by our norms about what principals do, what assistant principals do, what clerical staff does and what parent volunteers do. We will address these norms in future lessons.
- Video: Time Track Daily Meeting (0:15)** Show *TimeTrack™ Daily Meeting video* (http://www.samsconnect.com/?page_id=35). Discuss how this meeting is used as a tool to keep the principal focused on the instructional leadership activities that add the most value.
- Discuss: How could you accomplish the following, shown in the video, if you did not have a SAM?
- Review Monthly Goal(s)
 - Review time on instruction from the previous day
 - Discuss times principal did not do scheduled instructional leadership work. Why? Who else could have helped?
 - Discuss time spent on non-instruction
 - Review scheduled items for next day
 - Add new instructional items to calendar (schedule)
 - Discuss management issues SAM is dealing with—direction

**Presentation:
Introduction to
Delegation (0:10)**

Transition to delegation as an important skill for increasing instructional time.

Show the slide with the *Delegation Pyramid*. Explain how the pyramid is organized.

Ask participants for examples of items at each level of the pyramid. As participants suggest different items, question them about why they think the item belongs in a certain category.

Distribute the handout: *Information: What to Delegate* (on page 46).

Invite them to add other items to this worksheet.

Ask: How can using this pyramid help you as principals?

- It can help you be more deliberate about deciding who needs to do what.
- It guides you by asking you to differentiate between “could,” “should,” and “must.”
- It can help you avoid the temptation to take on too much work yourself.
- It can help you maintain a sense of control about what tasks you delegate.

Emphasize: It is easier to delegate when you have administrative staff, such as a SAM, but this content and these skills apply to all principals, regardless of how their faculty and staff are organized.

**Exercise: What to
Delegate (0:35)**

Facilitate exercise:

- Ask participants to brainstorm a list of principal tasks. They may look at the time coding worksheets or other materials from previous lessons for ideas.
- Record the results of the brainstorming on a board or chart paper.
- Distribute the handout: *Exercise: What to Delegate* (see page 47).
- Ask participants to work in small groups to place items from the brainstormed list on the delegation pyramid.
- Allow fifteen minutes.
- Debrief: Ask groups to report out one item that was particularly difficult to categorize and explain their thinking.

Transition: Some of the items may have “ifs” attached to them. That is, you might think, “I can delegate this *if* someone has the background and training needed and *if* the superintendent is OK with it, and *if* it will not lead to overburdening someone else. In the next section, we’ll talk about how to take care of some of these “ifs.”

Discussion and Exercise:

Teamwork Within a Framework (1:00)

Show slide, *About Delegation*. Present information about delegation (on slide):

- What: Delegating is the assignment of tasks and responsibilities to help employees make their best contribution to the overall productivity of your unit. It is not asking someone to make copies; rather, it is asking someone to take responsibility for making something happen.
- Why: Delegation helps get work done and it also motivates people and frees you to perform important supervisory tasks. It is an excellent way to prepare employees to take over when someone, including yourself, is absent.
- How: When you delegate you become a teacher and a coach, telling what needs to be done, showing how it is to be done (when necessary), asking for a demonstration (when necessary) and following up.

Distribute *Information: Five Steps to Effective Delegation* (on page 48).

Explain that instead of presenting the content, you are going to ask them to demonstrate it.

Explain: We are going to form five groups and each group is going to create a skit demonstrating one of the five steps.

Plan activity *Exercise: Five Steps to Successful Delegation* (on page 50).

- Decide ahead of time whether you are going to use:
- Option One: Role Play
- Option Two: Discussion
- Also decide ahead of time which scenario you want to use (or whether you want different groups to use different scenarios). You may also ask aspirants to use their own scenarios.

Facilitate activity:

- Assist class in dividing into groups.
- Distribute the worksheet *Exercise: Five Steps to Successful Delegation* (on page 50).
- Present the scenario(s) on this exercise sheet. Encourage them to make whatever assumptions they need to make about the assignment in order to bring out the points on delegation.
- Allow 20 minutes for planning/discussion.
- Debrief:
- Option 1: Ask each group to present their skit in turn, while others observe and give feedback.
- Option 2: Ask each group to present their key learning points.

Discuss: How might you delegate if you:

- Had a ninth grade academy?
- Had more than one assistant principal?
- Did not have any assistant principals?
- Have parent volunteers in the front office?

Distribute the *Worksheet: Delegation Self Assessment* (on page 51). Ask participants to use this self assessment during their internship as well as when they are in a principalship.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- It is not necessary to add staff; a principal can use organizational tools and existing staff to make a difference *if* a principal has a clear vision of how he/she wants to spend his/her time.
- Proactive beats reactive every time.
- The “big rocks” only fit when they are put in the jar first.
- The principles we’ve learned apply to the principal’s work as well as the work of teachers, support staff, parents and students.
- The shift to spending more time on instruction and to using data to track time is not natural or easy; it must be deliberate, public and in partnership with another person.
- Delegation is an effective tool when used purposefully.

Follow Up

Follow-up Assignment

Distribute the following handouts:

- Assignment: Time Coding (on page 52)
- Worksheet: Time Coding (on page 53)
- Assignment: Weekly Calendar (on page 54)
- Worksheet: Weekly Calendar (on page 55)

Go over the instructions for the two assignments. Note that they are really two parts to the same assignment: Figuring out how a principal uses his or her time and then making a plan to increase the amount of time spent on instructional leadership.

Instructor's Note: If the aspiring principals observe in a school that has a SAM, they should also observe in a school that doesn't have a SAM, to compare the two.

Portfolio Assignment

Ask aspirants to submit their weekly plan for principal time use as part of their portfolio.

Reinforcement Ideas

Ask aspirants to think about leadership positions that they currently hold (e.g., on a textbook selection committee) and ask them to identify strategies they use to streamline managerial tasks.

Information: Different Models in SAM Project

Lesson 1.3

<p>Model 1: New position</p> <p><i>Full time, new position, assists principal in increasing time spent on instructional leadership and takes on all operations responsibilities.</i></p>	<ul style="list-style-type: none"> ➤ Annual Data Collection: Time/Task Analysis and school community surveys used to measure instructional time and perception of principal's role ➤ Daily TimeTrack Meeting: Records and analyzes administrator's daily activity and assists in distributing managerial tasks ➤ Coaching from an outside source: Time change coach, monthly visit ➤ SAM: New full-time employee, performs administrative responsibilities
<p>Model 2: Converted position</p> <p><i>Full time, existing position, redesigned to assist principal in increasing time spent on instructional leadership and takes on all operations responsibilities.</i></p>	<ul style="list-style-type: none"> ➤ Annual Data Collection: Time/Task Analysis and school community surveys used to measure instructional time and perception of principal's role ➤ Daily TimeTrack Meeting: SAM records and analyzes administrator's daily activity and assists in distributing managerial tasks ➤ Coaching from an outside source: Time change coach, monthly visit ➤ SAM: Current full-time employee, performs administrative responsibilities.
<p>Model 3: Additional duties assigned to an existing position</p> <p><i>Portion of existing position redesigned to assist principal in increasing time spent on instructional leadership.</i></p>	<ul style="list-style-type: none"> ➤ Annual Data Collection: Time/Task Analysis and school community surveys used to measure instructional time and perception of principal's role ➤ Daily TimeTrack Meeting: SAM records and analyzes administrator's daily activity and assists in distributing managerial tasks ➤ Coaching from an outside source: Time change coach, monthly visit ➤ SAM: Current employee, helps with daily TimeTrack meeting but normally does not perform additional duties; may assist principal in distributing specific administrative tasks to others.
<p>Note</p>	<ul style="list-style-type: none"> ➤ PSA independent/external research has determined that models 1 and 3 work equally well. This has led to significant growth in the number of model 3 SAM schools. ➤ Most SAM schools share SAM responsibilities between several existing staff members: assistant principal, secretary, teacher leader, business manager, etc.

Information: What to Delegate

Lesson 1.3

Principal <i>must</i> do	<ul style="list-style-type: none">➤ Personnel issues➤ Teacher evaluation➤ Strategic decision making➤ Student behavior management: suspension or expulsion
Principal <i>should</i> do, but someone could help	<ul style="list-style-type: none">➤ Reports, special requests (if skill level is there)➤ Budgeting➤ Projects with a short turnaround time
Principal <i>could</i> do but others could do it if given the opportunity	<ul style="list-style-type: none">➤ Representing school at meetings➤ Facilitating part of a faculty meeting➤ Functions principal dislikes (try to find someone who likes them)—this is not the same as giving people the “dirty work”
Others <i>should</i> do, but principal can help in an emergency	<ul style="list-style-type: none">➤ Routine decision making➤ Tasks that others are more qualified for than principal➤ Routine student behavior management
Others <i>must</i> do	<ul style="list-style-type: none">➤ Assignments that add variety to routine work➤ Tasks that will increase the number of people who can perform critical assignments

Exercise: What to Delegate

Lesson 1.3

Principal <i>must</i> do	
Principal <i>should</i> do, but someone could help	
Principal <i>could</i> do but others could do it if given the opportunity	
Others <i>should</i> do, but principal can help in an emergency	
Others <i>must</i> do	

Information: Five Steps to Successful Delegation

Lesson 1.3

Step One: Planning	
<ol style="list-style-type: none">1. Analyze your tasks and identify one you feel will provide you with additional freedom as well as benefiting the person to whom you delegate it.2. Determine goal(s).3. Visualize results.4. Consider needs (materials, policies, coaching, resources, etc.)5. Determine time frame.6. Choose the right person. Know the skills and capacities of individual staff, faculty and volunteers; tap each one's special creativity. Consider rotating tasks to keep staff motivated. Don't always give one person the "hard" stuff.7. Decide if any others need to be involved.8. Decide how to gain commitment.9. Solicit input from faculty and staff by asking, "How can we manage this?"	
Step Two: Engaging	
<ol style="list-style-type: none">10. Present big picture.11. Gain commitment.12. Communicate the goal(s).13. Communicate the expected results.14. Give pertinent information, such as deadlines.15. As needed, teach the person how to perform the task. Include explanation, demonstration and "teach back," as needed.16. Ask for a plan of action.17. Check for understanding and provide a chance for person to ask questions.18. Arrange for a meeting to see how it is going.	
Step Three: Collaborating	
<ol style="list-style-type: none">19. Review the goal and expected result.20. Discuss the plan and ways to overcome any possible obstacles.21. Communicate boundaries.22. Discuss how/when monitoring will be done.23. Schedule coaching sessions, if needed.24. Establish milestone meetings.	

Step Four: Supporting

25. Allow the employee the freedom to practice and get up to speed.
26. Check progress. Follow up in a positive manner.
27. Evaluate the need for coaching or other support.
28. Discuss obstacles and solutions.
29. Offer encouragement and support.
30. Create a relaxed and efficient environment. People make mistakes and produce less when supervision is too close and constant or too distant.
31. Be realistic and respectful of time involved.

Step Five: Appreciating

32. Show genuine interest in the results.
33. Give your employees every opportunity to do a good job and when they do, follow up with compliments. Give credit when credit is due.
34. Do not accept unfinished, inaccurate or substandard work.
35. Accept your own accountability for unsatisfactory results.
36. Review the delegation process to see what could have been done better. Welcome suggestions and complaints.

Other Thoughts:

- Set a good example. Pitch in and work from time to time to demonstrate your competency, but don't overdo it.
- Consider designating certain days/times of day for "closed door" work.
- Divide work equitably; delegate to all.
- Make it clear to everyone that delegating is a tool to increase unit productivity, build employee competence and confidence, and allow you more time to support them in their work.

Exercise: Five Steps to Successful Delegation

Lesson 1.3

Directions:

- Option 1: Role Play. Read one of the scenarios below. With other members of your small group, plan a skit to act out each step in the delegation process.
 - Option 2: Discussion. Read one of the scenarios below. With other members of your small group, discuss how the principal should complete each step in the delegation process.
-

Scenario 1: The superintendent has asked you (the principal) to put together some discipline numbers for a report that is due in two weeks. You have decided to delegate this task.

Scenario 2: You are working on spending less time on bus and cafeteria supervision. You have decided to delegate this to various other staff.

Steps in the Delegation Process:

- Planning
- Engaging
- Collaborating
- Supporting
- Appreciating

Use the information on the previous two pages as a guide and a checklist.

Worksheet: Delegation Self Assessment

Lesson 1.3

How well do you delegate? Rate each item on a 1-5 scale:

Items	Never	Always
Each of my employees know what I expect of him/her.	1 2 3 4 5	1 2 3 4 5
I involve employees in goal setting, problem solving and school improvement activities.	1 2 3 4 5	1 2 3 4 5
I place my personal emphasis on planning, organizing, motivating and monitoring, rather than doing tasks others could do.	1 2 3 4 5	1 2 3 4 5
When assigning work, I select the employee thoughtfully.	1 2 3 4 5	1 2 3 4 5
When a problem occurs on a task I have delegated, I give the employee a reasonable chance to work it out for him/herself.	1 2 3 4 5	1 2 3 4 5
When I delegate work to employees, I brief them fully on the details with which I am familiar.	1 2 3 4 5	1 2 3 4 5
I see delegation as one way to help employees develop their skills, and I assign work accordingly.	1 2 3 4 5	1 2 3 4 5
When I assign work, I stress the results desired, not how to accomplish them.	1 2 3 4 5	1 2 3 4 5
When I delegate a project, I make sure everyone concerned knows who is in charge.	1 2 3 4 5	1 2 3 4 5
When delegating work, I balance authority with need and experience.	1 2 3 4 5	1 2 3 4 5
I hold my employees responsible for results.	1 2 3 4 5	1 2 3 4 5

Assignment: Time Coding

Lesson 1.3

Your first assignment is to shadow a principal, code his/her time, and reflect on how the principal uses time.

1. Get a watch (or timer or another way to keep time) and make several copies of the [Worksheet: Time Coding](#). This worksheet uses the same format as you used previously.
2. Arrange a period of time to shadow a principal. A complete day would be optimal; if this is not possible, try to get at least several consecutive hours.
3. Explain that you are gathering data on principal time use to better understand what a principal does during a day.
4. Use your timer/watch to carefully mark times. During the observation period, make a note every five minutes of what the principal is doing *at that moment*. At times, the principal may be “between activities;” just record what he/she is doing at the five-minute mark. Keep as close as you can to the schedule.
5. During the observation period, complete the first three columns.
6. After you have done all your data recording, calculate the percentage of time spent on management and on instruction, then complete the remaining columns in the worksheet. (Note: If you have a large number of observations, you may choose to complete the worksheet only for select observations that really stood out to you.)

Follow up with *Assignment: Weekly Calendar*.

Assignment: Weekly Calendar

Lesson 1.3

Note: This is a follow up to the assignment: Time Coding.

Based on your findings in the assignment *Time Coding*, create a plan to help the principal “grab more time” in the typical week in the life of a principal.

1. Interview the principal to determine:
 - a. What items must go on the calendar for the upcoming week
 - b. What items are essential to include each day, including time for checking messages/email
 - c. What the principal would like more time for, especially in the area of instructional leadership
 - d. Time stealers: What types of things keep the principal from spending time on the items in (c)
2. Based on the observations you made and an interview with the principal, create a calendar (see handout *Weekly Calendar*) for the upcoming week. Schedule by the $\frac{1}{4}$ hour and include goals/priorities for each day.
3. Based on the time stealers identified by the principal, develop a plan and strategy for preventing time stealers from derailing the principal from the calendar goals. Consider delegation, use of information systems, communication tools and other strategies.

Worksheet: Weekly Calendar

Lesson 1.3

	Monday	Tuesday	Wednesday	Thursday	Friday
7:00					
7:15					
7:30					
7:45					
8:00					
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Strand Two: Influencing Norms

2.1 Introductory Lesson

What expectations do our stakeholders have about how principals should spend their time?

Context

Strand 2 The first strand focused on helping aspiring principals develop a detailed understanding of how principals should spend their time and why instructional leadership time is so important to students. This second strand of lessons focuses on how this vision may be in conflict with widely held school norms and what principals can do to shape expectations.



Overview

Purpose In this lesson, participants begin to think about how their own ideas of how a principal should spend time may be different from those of other school stakeholders.

Description	The lesson starts with a shot of a principal whose calendar, office and schedule are a remarkable departure from what is typical. The video is used to jump start a discussion about expectations and how they impact how a principal spends time. Aspiring principals brainstorm a list of stakeholders whose expectations must be managed in order to make improvements in time use. The instructor presents various tools used to evaluate principals, and aspirants discuss alignment between these tools and research findings. All this prepares the aspirants to go out and complete an assessment of stakeholder expectations.
Objectives	<ul style="list-style-type: none"> ➤ Identify school stakeholders' expectations about how principals should spend their time.

Preparation

Materials	<p>Handouts in this document:</p> <ul style="list-style-type: none"> ➤ <i>Assignment: Assessing Stakeholder Expectations</i> (on page 60) ➤ <i>Information: ORID Focused Discussion Method</i> (on page 61) <p>Handout NOT in this document:</p> <ul style="list-style-type: none"> ➤ Expectations packet: Gather some materials that provide insights into the expectations of various stakeholders regarding principal time. Examples might include: job performance evaluation forms, an excerpt from a principal's calendar, newspaper articles, some sample emails to/from a principal, national or state standards for principals, etc. <p>Video:</p> <ul style="list-style-type: none"> ➤ California Dreaming: An Eight Hour Principal Day (http://www.samsconnect.com/?page_id=35) <p>PowerPoint files:</p> <ul style="list-style-type: none"> ➤ Making Time 2.1 http://www.samsconnect.com/makingtime/html/content/Making_Time_2-1.ppt
Professor Preparation	<p>Develop an “expectations evidence” packet: Gather some materials that provide insights into the expectations of various stakeholders regarding principal time. Examples might include: job performance evaluation forms, an excerpt from a principal's calendar, newspaper articles, some sample emails to/from a principal, national or state standards for principals, etc.</p> <p>Preview the video <i>California Dreaming: An Eight Hour Principal Day</i>. Decide how much of the video you want to show and where you want to stop it.</p>
Student Preparation	None needed.

Instructional Sequence

Video and Discussion: Expectations (0:30)

Note: Use the [PowerPoint file, Making Time 2.1](#) (on CD) to facilitate the lesson.

Introduce the lesson by explaining that it is about understanding, appreciating and shaping expectations about how principals use their time.

Ask aspiring principals about their own expectations about principal time use. What do they think principals should do with their time? How much time should a principal spend at work?

Introduce the video and ask them to watch it and take notes on ways that the principal does/does not meet their expectations about principals.

Show the video, [California Dreaming: An Eight Hour Principal Day](#) (http://www.samsconnect.com/?page_id=35). It is about 15 minutes long.

Instructor's Note: To save time, you may choose to view only the first five minutes of the video.

Discuss: In what ways are this principal's calendar, office and schedule a remarkable departure from what is typical? What is your reaction? What do you think was the reaction of her parents, teachers, superintendent and students?

Discussion: Stakeholders (0:45)

Ask aspiring principals to brainstorm a list of stakeholders whose expectations must be managed in order to make improvements in time use. This list should include, at a minimum, the principal, the superintendent, central office staff, faculty/staff, parents, students and the local community.

Small Group Discussion: Aligning Expectations (0:45)

Discuss ways that we can find out what stakeholders' expectations are. For example, one way we know central office expectations is to look at a job description and a performance evaluation. What are some other examples of things we can observe that reveal clues about people's expectations?

Distribute an "expectations evidence" packet (see description in preparation section of this lesson) to small groups of students (2-4 people per group). *Note: You may give one packet to each small group or one piece of evidence from the packet to each small group.*

Ask them to look through the various pieces of evidence and identify signs of alignment/misalignment between what documentation says versus unwritten expectations, as well as signs of alignment/misalignment between what stakeholders expect and what the research tells us about how principals should spend their time.

Use the quotes used in the PowerPoint to tie this discussion to the articles from strand one.

Summarize: Clearly, a principal (or an aspiring principal) cannot make changes in time use without first understanding, then addressing, stakeholder norms. Your homework assignment will help you assess stakeholder norms at your school.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- How you spend your time shows what you value.
- Different stakeholders—central office, faculty, staff, parents, students—may have different expectations for how a principal should spend time.
- Traditional paradigms are largely focused on operations management.
- Understanding stakeholder expectations involves talking to them, looking at what is written and observing.

Follow Up

Preparation Assignment for Next Lesson

Distribute the following handouts:

- [Assignment: Assessing Stakeholder Expectations](#) (see page 60)
- [Information: ORID Focused Discussion Method](#) (see page 61)

Explain the details of the assignment.

Explain that you used the ORID process in the debrief to the *California Dreaming* video.

Portfolio Assignment

Ask aspirants to submit their stakeholder assessment as part of their written portfolio.

Reinforcement Ideas

This content could be introduced or reinforced in a course that included information and skills related to school culture/context.

Assignment: Assessing Stakeholder Expectations

Lesson 2.1

Part One: Stakeholder Assessment: With the principal's permission, assess stakeholder expectations in the school. The following are suggested strategies. You may have other strategies that will work better in your environment.

- Observe a PTA/PTO meeting. What do their words and actions say about their expectations regarding principal time?
- Observe a faculty meeting. What can you infer about expectations regarding principal time?
- With permission, review written materials such as job performance evaluation forms, the principal's calendar/schedule, some sample emails to/from a principal, etc.
- Use the ORID process to explore stakeholders' expectations through interviews or small group discussions with different stakeholder groups. (See separate ORID guidelines).
- Simply ask people: What do you think the principal should spend his/her time doing?
- Discuss time use with the superintendent (or another district administrator to whom you report). What are his/her expectations?
- Observe a school board meeting. What do their words and actions say about their expectations regarding principal time? How much time does the board itself spend on instruction versus time spent on management?

Part Two: Reflection and Analysis:

Think about the following questions, and write up an assessment of current school norms for principal time use and how well they align with Leithwood's/McREL's research findings.

- What is the operative paradigm for the principal's time?
- Does it vary by stakeholder?
- Do the stakeholders' views support the model of the principal as instructional leader?

Information: ORID Focused Discussion Method

Lesson 2.1

The ORID-focused discussion method has four consecutive stages: Objective, Reflective, Interpretive and Decisional. It is a logical series of questions that probes the natural sequence humans use to think about an issue. As the facilitator of this discussion, your job is to develop a series of probing questions, in sequence, which help interviewees explore (discuss) their common experience. You can use this to conduct one-on-one or small group discussions. Note that the questions below are only examples.

O objective discussion – draws out the facts about the experience or event. As a facilitator you would ask questions like:

- What sorts of things do you observe the principal doing?
- What should a principal do all day?
- What are a principal's most important responsibilities?
- On what should a principal's time be spent?
- On a daily basis, what are the priorities for a principal's calendar?
- What should a principal do when there are demands on his or her time that aren't in line with these priorities?

R reflective discussion – enables people to discuss how they felt about the event. Ask questions such as:

- How do you feel about how principals spend their time?
- How do you feel about the priorities other people might have for the principal's time?
- What are some principal responsibilities/activities that you feel should be cut?
- What have you observed about principals and how they spend their time that makes you feel good?

I interpretive discussion – enables the people to consider the meaning and value of what they've observed. You can ask questions such as:

- What would you say about how principals should spend their time to a brand new principal?
- If you could wave a magic wand, what changes would you make in terms of how principals spend their time?
- What do you think other people, or groups of people, view as the most important use of a principal's time?

D decisional discussion – enables people to make decisions or respond to the experience. You can ask questions such as:

- What do principals need to do differently during the day to be more effective?
- What could be done to facilitate the principal spending the most time on the most important things?

Strand Two: Influencing Norms

2.2 Development Lesson

What school and district conditions support a principal's focus on instructional leadership time?

Context

Strand 2 Lesson 2

As was briefly introduced in the first lesson in this strand, norms about time use are just one part of the overall context. In this lesson, the class will focus on defining the desired state, in preparation for the gap analysis that they will complete in the next lesson.



Overview

Purpose

In this lesson, aspiring leaders process the data that they gathered and begin to contrast “what is” with “what should be.”

- Description** The class will focus first on debriefing the assessment that they completed as part of the homework for lesson 2.1. Next, they will explore how the context would be different in a world where everyone understood and valued the principal devoting time to instructional leadership instead of other things. They will do this through a jigsaw of three readings and subsequent completion of a worksheet.
- Objective**
- Identify enabling conditions within the school and district culture that support a principal focus on instructional leadership time.

Preparation

- Materials**
- Handouts in this document:**
- *Worksheet: Conditions That Support a Principal Focus on Instructional Time* (on page 67)
- Handouts NOT in this document:**
- Bloom, G. (2004). Dear principal. *Leadership*. January 1, 2004. <http://www.samsconnect.com/makingtime/html/content/dearprincipal.pdf>
 - SAMple School 6 <http://www.samsconnect.com/makingtime/html/content/handoutsamplerta.pdf>
- PowerPoint file:**
- Making Time 2.2 http://www.samsconnect.com/makingtime/html/content/Making_Time_2-2.ppt
- Professor Preparation** Have the articles copied in sufficient numbers so that you may divide them among the participants.
- Student Preparation** Bring their assessment from the lesson 2.1 homework. *Note: This is critical to the lesson; make sure students know to bring this.*

Instructional Sequence

**Pair and Share:
Homework
Follow-up (0:45)**

Note: Use the [PowerPoint file, Making Time 2.2](#) to facilitate the lesson.

Explain the basic structure of the lesson.

Ask students to take out their stakeholder assessment and analysis from the previous lesson's [Assignment: Assessing Stakeholder Expectations](#) (on page 60).

Ask students to "pair and share."

- With another student, first they should discuss their findings from part one of the homework assignment, then they should discuss the questions under part two of the assignment.
- Expand the pair and share by asking each pair to combine with another pair and compare notes.

Debrief: Discuss, as a large group:

- What data gathering methods were the most revealing to you? How?
- What significant similarities and differences were there in your findings?

Provide a transition between the activity just completed (what is) and the next activity (what should be).

**Discussion:
Envisioning the
Ideal (0:30)**

Explain that they will explore how the context would be different in a world where everyone understood and valued the principal devoting time to instructional leadership instead of other things.

Discuss: What would it look like? What would it feel like?

Distribute the handout: [Worksheet: Conditions That Support a Principal Focus on Instructional Time](#) (on page 67). Go over the instructions on the worksheet, and help them form small groups.

Distribute the following article, and ask participants to read it and use it as a thought jogger to complete the worksheet.

- Bloom, G. (2004). [Dear principal.](#) *Leadership*. January 1, 2004. <http://www.samsconnect.com/makingtime/html/content/dearprincipal.pdf>

After small group discussion, debrief as a large group.

Discussion: What Conditions Led to the Change?

Using the same small groups as in the previous activity, distribute the following:

- **Handout:** [Worksheet: Interpreting a Principal’s Time/Task Analysis Data](#) (on page 68)
- **Handout:** [SAMple School](#) <http://www.samsconnect.com/makingtime/html/content/handoutsampleta.pdf>

Ask participants to use the data to answer the questions on the worksheet.

After small group discussion, debrief as a large group.

Go back to [Worksheet: Conditions That Support a Principal Focus on Instructional Time](#) (see page 67) and see if there are new items to add based on the data analysis.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- There are conditions in the district and in the school that support a principal focusing on instructional leadership; conversely, there are conditions that do not support this focus.
- Various stakeholders have a role in making sure supportive conditions are present.
- Expectations are just one part of a supportive context; there must also be supportive structures and systems, scheduling and staff and other resources.

Follow Up

Follow-up Assignment

Distribute the handout: *Assignment: A Discussion About Conditions* (on page 69)

Go over the instructions for the assignment.

Reinforcement Ideas

This content could be introduced or reinforced in a course that included information and skills related to culture or change management.

Worksheet: Conditions That Support a Principal Focus on Instructional Time

Lesson 2.2

Directions: Using the *Dear Principal* reading, complete this chart. With others in your small group, identify key points from your article to present to others. Then, listen as other groups present their findings, and write additional notes on the chart.

	School	District
Expectations		
Structures and systems		
Scheduling		
Staff & Other Resources		

Worksheet: Interpreting a Principal's Time/Task Analysis Data

Lesson 2.2

Use the "SAMple School Six" data report to answer the questions below. This data report shows the principal's Time/Task Analysis baseline data from 2007 and compares it with his/her data one year later. The principal and school community worked for a full year to change the principal's practice so a majority of time would be spent on instructional leadership.

What percent of the week did the principal spend on instructional leadership in 2007? 2008?

List the three management descriptors with the highest percentage of time spent in 2007. List the three highest management descriptors in 2008.

Compare the Instructional Leadership descriptors for 2007 and 2008. Where did this principal have the greatest increases?

What is the average number of hours worked each day for this principal in 2008? Was it different in 2007? Why?

Should this principal set a goal to increase the percentage of personal time? Why/Why Not?

Find the Instructional Descriptors, 2008, showing 0%. What do you think this means? If this were your data report what would you do?

Assignment: A Discussion About Conditions

Lesson 2.2

Directions: Go back to principal that you shadowed and schedule a 15-minute discussion about conditions that do/don't support the principal spending time on instruction and instructional leadership.

During this meeting, discuss the following:

- What are the stakeholder expectations for how a principal should spend time, and how do these expectations impact the principal's day?
- What conditions in the district do/don't support the principal spending time on instruction and instructional leadership?
- What conditions in the school do/don't support the principal spending time on instruction and instructional leadership?
- What conditions in the community do/don't support the principal spending time on instruction and instructional leadership?
- What can teachers do to improve the conditions so that principals can spend more time on instruction and instructional leadership?
- What can school staff do to improve the conditions so that principals can spend more time on instruction and instructional leadership?

Strand Two: Influencing Norms

2.3 Application Lesson

What can be done to bridge the gap between the current and ideal conditions?

Context

Strand 2 Lesson 3

In the previous two lessons and their assignments, aspiring principals got a good idea of the types of contextual factors, or cultural conditions that support a principal spending time on instructional leadership as well as some ideas about the existing context in their schools. In this lesson, they'll explore some strategies for closing the gap between the two (existing and ideal).



Overview

Purpose

In this lesson, aspiring leaders complete a gap analysis related to time use norms.

Description

Through a series of discussions, aspiring principals explore a variety of ways to bridge the gap between the current and ideal states. They also complete two worksheets that help them structure their ideas.

- Objectives**
- Complete a gap analysis related to time use norms.
 - Identify strategies for influencing time use norms.

Preparation

Materials

Handouts in this document:

- Worksheet: What Growing Pains Can We Expect to Face? (page 74)
- Worksheet: Gap Analysis (page 75)

Handout NOT in this document:

- Optional: Example of a completed gap analysis (instructor should provide)

PowerPoint file:

- Making Time
2.3 http://www.samsconnect.com/makingtime/html/content/Making_Time_2-3.ppt

Professor Preparation

Copy handouts.

Optional: Provide an example of a completed gap analysis.

Student Preparation

Bring materials from previous lessons.

Instructional Sequence

**Pairs Discussion:
Growing Pains
(0:20)**

Note: Use the **PowerPoint file, *Making Time 2.3*** to facilitate the lesson.

Explain: The previous two lessons and their assignments laid the foundation for the types of conditions that support a principal spending time on instructional leadership as well as some ideas about the existing conditions in your schools. We focused on the cultural norms related to the expectations of different stakeholders. In this lesson, we'll talk about bridging the gap, but first, let's look at what each of these stakeholders can gain—and lose—if the principal focuses more on instructional leadership.

Distribute the handout: ***Worksheet: What Growing Pains Can We Expect to Face?*** (on page 74).

Ask them to complete the worksheet and discuss it with a partner. Ask them to consider what they learned in their “discussion with the principal” assignment.

Large Group Discussion:
Strategies for Bridging the Gap (0:40)

Discuss:

- As you have learned throughout these lessons, the first step in making a change in a positive direction is gaining an awareness of new ideas and research. How would you, as a principal, make sure that your stakeholders know the importance of instructional leadership time? How would you ensure that staff is fully aware of current research?
- In the SAM materials, various principals talked about the need to “go public;” that is, that the principal needs to be very frank about what he/she is trying to do. What would you do as a principal to “go public,” and how would that help support change and hold you accountable?
- One use of the ORID model is to engage people in conversations in a structured way to help uncover and shift their beliefs. What kinds of questions would you—as principal— ask to positively impact the context?
- The *Dear Principal* article was a hypothetical letter to stakeholders, letting them know how they could help develop and support the right conditions for principals to spend time on instructional leadership. In what ways would you communicate with your stakeholders, and what would you say?
- What structures could you put in place on your own to help increase—and bring the most value possible to—the instructional leadership time you do have?

Note: This would be a good place to tie the content to any change management content that you’ve already taught these aspiring principals.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- All stakeholders need to know the research on instructional leadership.
- Going public is a great strategy for gaining support and keeping yourself on track.
- Engaging in conversations and asking questions is one way to lead change.
- You need a plan for communicating to each stakeholder group and addressing their concerns.
- There are structures you can put in place as principal that can help you make more time and make the most of time.

Follow Up

**Homework
Assignment**

Distribute the handout [Worksheet: Gap Analysis](#) (on page 75).

Explain how the diagram is created and used and ask aspirants to identify possible items for the different sections of the worksheet.

Optional: Provide an example of a completed gap analysis.

Ask aspirants to take at least one of the articles on time management (McREL or Leithwood would be good choices) and discuss them with colleagues at their schools.

**Portfolio
Assignment**

➤ The gap analysis should be part of the portfolio.

**Reinforcement
Ideas**

This content could be introduced or reinforced in a course that included information and skills related to change management.

Worksheet: What Growing Pains Can We Expect to Face?

Lesson 2.3

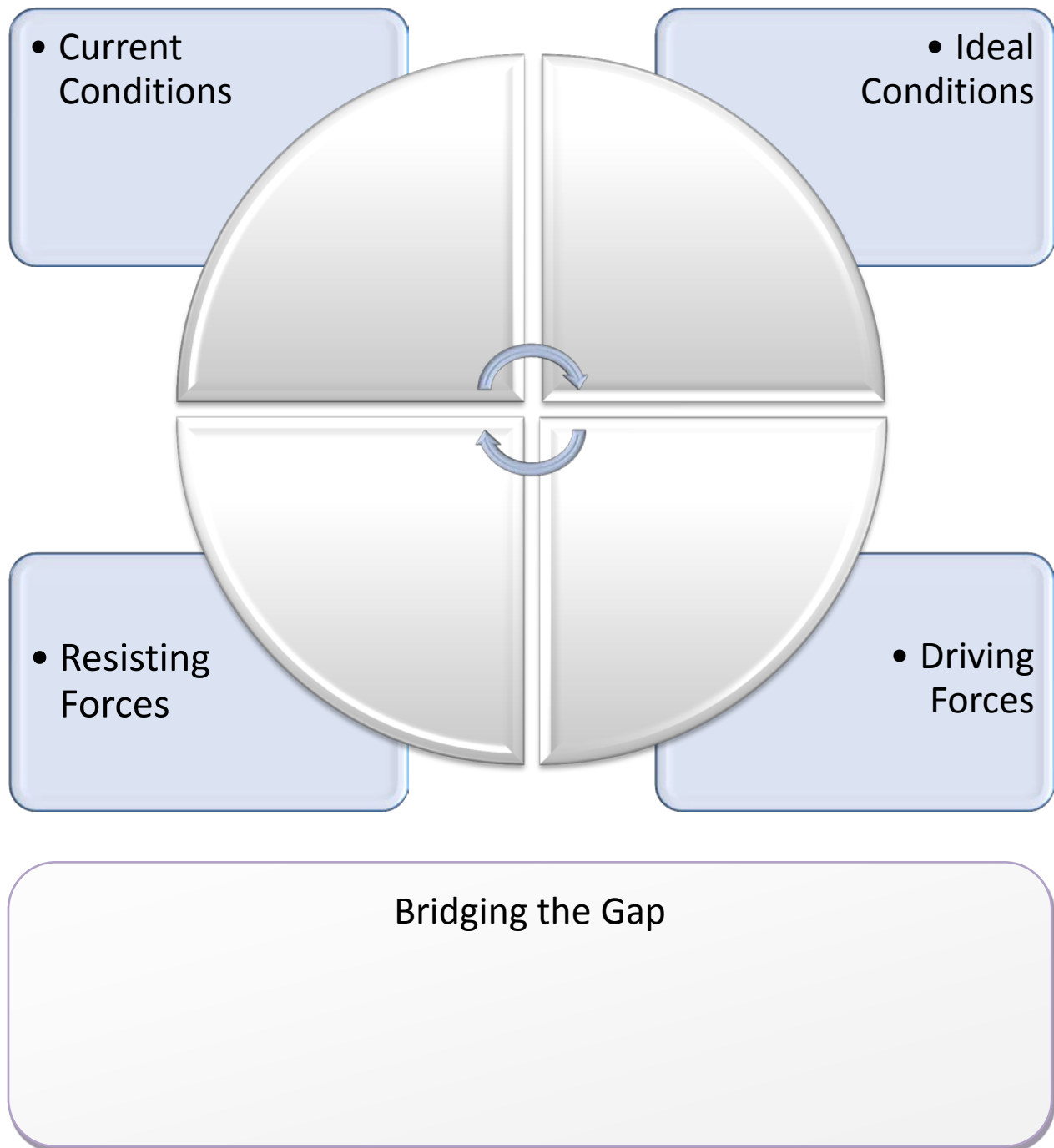
Directions: List each stakeholder group and then jot down a summary of their norms/expectations and then what they stand to gain or lose from the principal doing something different.

Stakeholder Group	Norms	Gains	Losses

Worksheet: Gap Analysis

Lesson 2.3

Directions: First, complete the top row of the diagram, based on what you have already learned. Then complete the bottom row, based on forces that might be barriers to developing the ideal conditions (resisting forces) as well as forces that can be harnessed to help achieve the ideal conditions (driving forces). Finally, write your ideas for closing the gap in the last box and discuss your findings with your principal. Does he or she agree or disagree with findings? How so? From the principal's perspective, what can you (the aspiring principal) do right now to enhance the conditions for your current principal?



Strand Three: Developing Self

3.1 Introductory Lesson

How do you want to spend YOUR time?

Context

Strand 3 Lesson 1

Ultimately, it comes down to a willingness to change. In the first two strands, we focused on building a general understanding of concepts related to principal time use. In this strand, aspiring principals will explore their own beliefs, attitudes and comfort zones, and figure out what is important to them and how to communicate that to others.



Overview

Purpose

In this lesson, aspiring leaders start to take a more detailed look at their own attitudes and goals regarding time use.

Description	In this Socratic lesson, aspiring principals are prompted to think about the relationship between actions and values—specifically, their own. Through a series of discussions, they try to better understand what their actions reveal about their beliefs, and how they can change their actions to be more in line with their beliefs.
Objectives	<ul style="list-style-type: none"> ➤ Demonstrate how to effectively reflect on one’s own time use. ➤ Identify ways to change the way one spends time.

Preparation

Materials	<p>Homework article (on CD): Kegan, R. and Laskow Lahey, L. (2001). The real reason people won’t change. <i>Harvard Business Review</i>. November, 2001. http://www.samsconnect.com/makingtime/html/content/realreasons.pdf</p> <p>Handouts in this document:</p> <ul style="list-style-type: none"> ➤ <i>Information: Stephen Covey on Uncovering Your Values</i> (page 81) ➤ <i>Information: Covey’s Four Quadrants</i> (page 82) ➤ <i>Assignment: Identifying Your Strengths as an Instructional Leader</i> (page 83) <p>PowerPoint files:</p> <ul style="list-style-type: none"> ➤ Making Time 3.1 http://www.samsconnect.com/makingtime/html/content/Making_Time_3-1.ppt
Professor Preparation	<p>Copy handouts.</p> <p>Review background information from Stephen Covey related to time management. There are many books, articles and audio books you can access. One useful reference would be the book <i>The 7 Habits of Highly Effective People</i>.</p>
Student Preparation	None

Instructional Sequence

**Large Group/
Pairs Discussion:
Attitudes and
Values (0:30)**

Note: Use the [PowerPoint file, Making Time 3.1](#) to facilitate the lesson.

Ask aspirants to recall the principal in the video *California Dreaming* who worked an eight-hour day and had a clear desk.

Discuss:

- What was your reaction?
- What does your reaction say about your attitudes and beliefs?
- How do you think a principal should spend time?
- When you envision yourself as a school principal, how do you envision spending your time?

Ask participants to discuss the following with a partner:

- Think of how you spend time now, in your current position. Is it consistent with those attitudes and beliefs?

**Reflection and
Pairs Discussion:
Your Own Funeral
(0:20)**

Distribute the [handout: Information: Stephen Covey on Uncovering Your Values](#) on page 81.

Provide an overview of this idea, then allow some time for them to reflect and take notes. After about five minutes, ask them to share with a partner.

Discuss: What did this exercise reveal about your values? Are you spending your time in a way that is consistent with your values?

**Large group
exercise: Covey's
Quadrants (0:30)**

Facilitate exercise:

- Discuss Covey's thoughts on time use (on slide).
- Distribute the [handout: Information: Covey's Four Quadrants](#) on page 82.
- Present the four quadrants and ask for additional examples.
- Discuss: How do Covey's quadrants fit with the time use concepts we've been discussing? In which quadrant(s) do management tasks fall? Instructional leadership tasks? Tasks that reflect your basic values? In which quadrant(s) do we spend the most time? In which quadrant(s) *should* we spend the most time?
- Discuss examples of principal behaviors in each quadrant and ask aspirants to complete the blank chart on the handout.

Large Group Discussion: Managing Time (0:30)

Discuss the various ways that principals can make additional time for Quadrant II activities, including:

- Delegating
- Sharing management and leadership
- Tracking time
- Creating and implementing a management plan
- Systems for operations (e.g., screening calls, escalation procedures, handling mail, checklists for regular events, monthly calendar, master calendar)
- Creating greater awareness of importance of instructional leadership

Emphasize the importance of bringing as much value as possible to all time. Discuss how more time in quadrant II can increase the quality of both management and instructional leadership time.

Discuss: What can you do as an aspiring principal to more proactively control your time *in your current positions*? What tools do you have at your disposal to help you control *your* management time?

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- What you DO illustrates what you BELIEVE.
- People rarely remember you for how you do mundane tasks.
- We must make a conscious effort to spend more time on important/not urgent activities.
- Structures can:
 - Increase instructional leadership time
 - Make the most of the time you already have

Follow Up

Preparation Assignment for Next Lesson

Distribute the **handout, Assignment: Identifying Your Strengths as an Instructional Leader** (see page 83).

Distribute the homework reading: Kegan, R. and Laskow Lahey, L. (2001). **The real reason people won't change**. *Harvard Business Review*. November, 2001 <http://www.samsconnect.com/makingtime/html/content/realreasons.pdf>

Ask the participants to complete the first two columns of the chart on the assignment sheet, and explain that the third column will be completed in a future lesson.

Ask aspirants to read the article in preparation for the next lesson.

Portfolio Assignment

There are no portfolio assessments for this lesson.

**Reinforcement
Ideas**

This content could be introduced or reinforced in a course that included information and skills related to understanding self.

You may want to ask aspiring principals to purchase the book *Now, Discover Your Strengths* or *How Full is Your Bucket*. Both of these books encourage developing self knowledge, and both include a code that can be used (one time) to complete the *Strength Finder* tool on line.

Information: Stephen Covey on Uncovering Your Values

Lesson 3.1

Dr. Stephen Covey suggests another way to uncover those things that matter most to you. With your eyes closed, imagine in your mind, while someone else reads to you, the following scenario:

See yourself going to the funeral of a loved one. Picture yourself driving to the funeral parlor or chapel, parking the car and getting out. As you walk inside the building, you notice the flowers and the soft organ music. You see the faces of friends and family you pass along the way. You feel the sense of sorrow that permeates the room for losing this special person. You also sense the shared joy of having known this person that radiates from the hearts of all the people there.

As you walk down to the front of the room and look inside the casket, you suddenly come face to face with yourself. This is your own funeral and all of these people have come to honor you. They are here to express their feelings of love and appreciation for your life.

As you take a seat and wait for the services to begin, you look at the program in your hand. There are to be four speakers. The first speaker is someone from your immediate family – perhaps your mom or dad, a brother, sister, aunt or uncle, a cousin or grandparent. The second speaker is one of your best friends, someone who is going to tell about the kind of person you were. The third speaker is a teacher from your school. The fourth is a former student with whom you were close.

Now think deeply. What would you like each of these speakers to say about you and your life? What kind of son or daughter would you like their words to reflect? What kind of person would you like to have others say you were? Were you there for others when they needed you? Did you care for them and trust them and have a deep respect for them? What would your best friend say about you at your own funeral? What about the teacher? The student? What contributions would you like them to have said you made to other people's lives? What achievements would you want them to remember? (Covey, 2004)

Directions: Jot down some of your thoughts and impressions as you imagined this scenario.

Adapted from: Covey, Stephen R. (2004.) *The 7 Habits of Highly Effective People*. New York: Simon and Schuster, Ltd.

Information: Covey's Four Quadrants

Lesson 3.1

The chart below shows how Stephen Covey encourages people to think about their time.

<p style="text-align: center;">I Urgent – Important</p> <ul style="list-style-type: none"> ➤ Crises ➤ Pressing problems ➤ Deadline-driven projects, meetings, preparations 	<p style="text-align: center;">II Not Urgent – Important</p> <ul style="list-style-type: none"> ➤ Preparation ➤ Prevention ➤ Values clarification ➤ Planning ➤ Relationship building ➤ Empowerment
<p style="text-align: center;">III Urgent - Not Important</p> <ul style="list-style-type: none"> ➤ Interruptions, some phone calls ➤ Some mail, some reports ➤ Some meetings ➤ Many proximate, pressing matters ➤ Many popular activities 	<p style="text-align: center;">IV Not Urgent - Not Important</p> <ul style="list-style-type: none"> ➤ Trivia, busywork ➤ Junk mail ➤ Some phone calls ➤ Time wasters ➤ "Escape" activities

What principal activities fall into each of four quadrants?

<p style="text-align: center;">I Urgent – Important</p>	<p style="text-align: center;">II Not Urgent – Important</p>
<p style="text-align: center;">III Urgent - Not Important</p>	<p style="text-align: center;">IV Not Urgent - Not Important</p>

Source: Covey, Stephen R. (2004.) *The 7 Habits of Highly Effective People*. New York: Simon and Schuster, Ltd.

Assignment: Identifying Your Strengths as an Instructional Leader

Lesson 3.1

Instructions, Part I: Think about the skills and knowledge a principal needs to make effective use of time. Add items to the first column. Some ideas are already listed, just to get you started. Then, identify whether those areas are strengths or challenges for you. Do not complete the third column at this time.

Skills and Knowledge	Strength or challenge?	Development
Observing		
Coaching others		
Sharing expertise/craft knowledge		
Delegating		
Working with data		

Instructions, Part II: Read the article, *The Real Reason People Won't Change*, by Robert Kegan and Lisa Laskow Lahey. <http://www.samsconnect.com/makingtime/html/content/realreasons.pdf> We will be walking through this model in the next lesson.

Strand Three: Developing Self

3.2 Development Lesson

What keeps you from spending your time as you would prefer?

Context

Strand 3
Lesson 2

In the first lesson in this strand, aspiring principals learned about relationships between values and actions. In this lesson, they will dig a little deeper to better understand forces that might impact one's ability to act on one's beliefs.



Overview

Purpose

In this lesson, aspiring leaders look at competing commitments. Then they form a vision of their future time use.

Description

This lesson is largely comprised of a five-part activity in which participants think about, discuss, and chart their commitments, things that compete with their commitments and underlying assumptions. At the conclusion of the last part of the activity, they tie their insights back to the work they did on identifying strengths and weaknesses.

- Objectives**
- Embrace the role of instructional leader and willingly give up some management tasks in order to do so.
 - Choose to achieve work/life balance.
 - Develop a vision of how one wants to spend one's time.

Preparation

- Materials**
- Pre-reading article:**
- Kegan, R. and Lahey, L. (2001). The real reason people won't change. *Harvard Business Review*. November, 2001. <http://www.samsconnect.com/makingtime/html/content/realreasons.pdf>
- Homework article:**
- Horton, J. and Johnson, S. *A Successful Point of View*. <http://www.samsconnect.com/makingtime/html/content/pointofview.pdf>
- Handouts in this document:**
- Instructions: Looking Inward: Your Commitment to Change (page 90)
 - Worksheet: Looking Inward: Your Commitment to Change (page 92)
 - Sample: Looking Inward: Your Commitment to Change (page 93)
- PowerPoint files:**
- Making Time 3.2 http://www.samsconnect.com/makingtime/html/content/Making_Time_3-2.ppt
- Professor Preparation**
- Copy handouts.
- Note: Most of the activities in this lesson are adapted from: Wagner, T., Kegan, R., Lahey, L., Lemons, R. W., Garnier, J., Helsing, D., Howell, A., & Rasmussen, H. T. (2006). *Change Leadership: A Practical Guide to Transforming Our Schools*. San Francisco, CA.: Jossey-Bass. You may want to read this book, or two follow-up books, *How the Way We Talk Can Change the Way We Work* and *Immunity to Change*.
- Student Preparation**
- Completion of homework from Lesson 3.1

Instructional Sequence

Introduction: Note: Use the [PowerPoint file, *Making Time 3.2*](#) (on CD) to facilitate the lesson.

Looking Inward:

Dealing With Your Commitment for Change (0:05)

Introduce the lesson's activities: We will attempt to understand ourselves better by starting to cultivate a new kind of attention, a dual attention. This exercise will help us look inward as well as outward. As teachers and leaders we assume we are wholeheartedly committed to student improvement.

Distribute the [handout: *Worksheet: Looking Inward: Your Commitment to Change*](#) (on page 92).

Present: Using a Four Column Immunity Map, we will take this opportunity to look inward and assess those commitments, identify competing commitments and determine assumptions regarding student improvement.

Distribute the [handout: *Sample: Looking Inward: Your Commitment to Change*](#) (see page 93).

Present: This chart (on the sample (page 93) is labeled the *Four Column Immunity Chart* because immune systems protect us from doing things that might put us at risk or compromise our well-being. Immunity is the ability of an organism (teachers/leaders/principals) to resist a disease or a risk (change). We will be examining the example while completing our own maps. This activity will help us understand ourselves and to ascertain our own immunities to change. The reading you completed for homework will help you better understand the concepts as we walk through the model.

Distribute the [handout: *Instructions: Looking Inward: Your Commitment to Change*](#) (on page 90).

Ask everyone to have handy the [Assignment: *Identifying Your Strengths as an Instructional Leader*](#) from lesson 3.1 (on page 83).

**Small Group
Activity: Step
One: Identifying
Your
Commitment
(0:15)**

Instructor's Note: In the following sequence of five activities, related to the five steps in the process, you may find it useful to explain the content through the use of the example on the [handout: Sample: Looking Inward: Your Commitment to Change](#) (see page 93).

Discuss the following questions in small groups:

- What one or two aspects of your role as an aspiring leader make the biggest contribution toward the goal of improving instruction in your classroom?
- What is the most important thing you need to change/improve in order to make progress toward this goal?

Present:

- Using the goal, change the goal into this commitment statement: "I am committed to the value or importance of...." (The goal should be one that is significant and is likely to yield rich learning and progress for you and your students.)
- Write your commitment statement in the "Commitment" section of the Four-Column Immunity Map. The handout with the sample may be a help to you.

**Small Group
Activity: Step
Two: Identifying
Your Own
Obstacles (0:15)**

Present: One of the most difficult things about change is recognizing ways we create obstacles of our own that get in the way of progress.

Discuss the following question in small groups: What are you doing, or not doing, that gets in the way of reaching your commitment?

Present: Develop a list of specific behaviors—things you do and things you don't do. Write this list in the "Doing/Not Doing" of the Four-Column Immunity Map.

**Small Group
Activity: Step
Three: Detecting
the Competing
Commitment
(0:15)**

Present:

- Many times we find that our own fears, anxieties and feelings of discomfort are so powerful that they actually are part of another—competing commitment. This kind of commitment may be difficult to detect at first.
- In the “Competing Commitment” column in your Four-Column Immunity Map, write a list of the fears, anxieties you have about achieving your commitment.
- When you have finished your list of discomforts, draw a line and write the following introductory phrase: “I am also committed to...” Think how you might verbalize the commitment that protects or prevents you from having to face those fears and discomforts.

Present example: If an aspiring leader was not confident about interpreting data to make appropriate improvements in classroom instructional strategies or lesson design, the commitment statement may be, “I am committed to...not interpreting data results and committed to using only the strategies that are comfortable for me regardless of the data results.”

Present: Add any additional commitment statements that are derived from the fears, anxieties and discomforts.

**Small Group
Activity: Step
Four: Determining
the Big
Assumption
(0:15)**

Present:

- The assumption we have is really the key ingredient that actively holds our internal immune system in place. An assumption is something you have constructed to help you better understand and make sense of your world. It is a kind of rule or prediction about what will happen if you act or appear in particular ways.
- To identify your assumption, review your ideas in the “Competing Commitments” column and think of the reverse idea. Replace the words, “I am committed to...” with the words, “I assume that if...then...”
- The Big Assumption should demonstrate why your “Competing Commitments” feel absolutely necessary. Write your assumptions on your chart.
- Share your Competing Commitments and your Big Assumption with a partner.

**Small Group
Activity: Step
Five: Future
Immunity to
Change (0:10)**

Present: In small groups discuss how you might use the chart to provide direction when you encounter the need to make a change in how to spend your time to gain a greater focus on instructional leadership.

**Small Group
Activity: Follow
Up on Homework
Assignment (0:15)**

Present: In small groups, discuss:

- In what ways do your strengths contribute to your commitments?
- In what ways do your weaknesses contribute to your competing commitments?
- What can you do to develop your strengths *or* weaknesses to improve your ability to meet your primary commitments?

Present: Start to record your development ideas in the right-hand column.

Suggest that the aspirants email their ideas to a partner so they can encourage each other to persist.

Big Ideas

Make sure that the following big ideas have been discussed (they are summarized in the PPT and in full form here):

- As teachers and leaders we assume we are wholeheartedly committed to student improvement.
- One of the most difficult things about change is recognizing ways we create obstacles of our own that get in the way of progress.
- Many times we find that our own fears, anxieties and feelings of discomfort are so powerful that they actually are part of another—competing commitment.
- Awareness of competing commitments is a first step; the next step is developing your skills and knowledge in ways that help you meet your primary commitment.

Follow Up

**Preparation
Assignment for
Next Lesson**

Distribute the reading, Horton, J. and Johnson, S. *A Successful Point of View* (on Internet). <http://www.samsconnect.com/makingtime/html/content/pointofview.pdf>

Present: Read this article and think about what your “teachable point of view” might be.

**Portfolio
Assignment**

There are no portfolio assessments for this lesson.

**Reinforcement
Ideas**

This content could be introduced or reinforced in a course that included information and skills related to understanding self.

Instructions: Looking Inward: Your Commitment to Change

Lesson 3.2

1 Identifying Your Commitment. As teachers and aspiring leaders, we assume we possess wholehearted commitment to student improvement. In this activity we take the opportunity to look inward and assess our commitments, our competing commitments and our assumptions regarding student improvement. Like all immune systems, the system protects us from doing things that might put us at risk or compromise our well-being. The Four-Column Immunity Chart creates a picture of a system that is called by the authors of this book immunity to change.

- **Discuss** the following questions in small groups:
- What one or two aspects of your role as a teacher leader makes the biggest contribution toward the goal of improving instruction in your classroom and throughout the school?
- What is the most important thing you need to change/improve in order to make progress toward this goal?
- Using the goal, **change** the goal into this commitment statement: “I am committed to the value or importance of....” The goal should be one that is significant and is likely to yield rich learning and progress for you and your students. **Write** your commitment statement in the “Commitment” section of the Four-Column Immunity Chart.

2 Identifying Our Own Obstacles. One of the most difficult things about change is recognizing ways we create obstacles of our own that get in the way of progress.

- **Discuss** the following question in small groups: What are you doing, or not doing, that gets in the way of reaching your commitment?
- **Develop** a list of specific behaviors—things you do and things you don’t do. Write this list in the *Doing/Not Doing* of the Four-Column Immunity Chart.

3 Detecting the Competing Commitment. Many times we find that our own fears, anxieties and feelings of discomfort are so powerful that they actually are part of another—competing commitment. This kind of commitment may be difficult to detect at first.

- In the *Competing Commitment* column in your Four-Column Immunity Chart **write** a list of the fears, anxieties you have about achieving your commitment.
- Next, draw a line and write the following introductory phrase: “I am also committed to...” Write a commitment that protects or prevents you from having to face those fears and discomforts.

4 The Big Assumptions. The assumptions we have are really the key ingredients that actively hold our internal immune system in place. An assumption is something you have constructed to help you better understand and make sense of your world.

- To identify your assumption, review your ideas in the *Competing Commitments* column and think of their reverse. Replace the words, “I am committed to...” with the words, “I assume that if...then...”
- Share your Big Assumption with a partner from class.

5 Future Immunity to Change. In small groups discuss how you might use the chart to provide direction when you encounter the need to make a change in your building or district regarding the use of principal time. Using the Four-Column Immunity Chart, what might you write in each column?

Adapted from: Wagner, T., Kegan, R., Lahey, L, Lemons, R. W., Garnier, J., Helsing, D., Howell, A., & Rasmussen, H. T. (2006). *Change Leadership: A Practical Guide to Transforming Our Schools*. San Francisco, CA.: Jossey-Bass.

Worksheet: Looking Inward: Your Commitment to Change

Lesson 3.2

Looking Inward: Your Four-Column Immunity Chart			
Commitment	Doing/Not Doing	Hidden/Competing Commitment	Big Assumptions

Adapted from: Wagner, T., Kegan, R., Lahey, L, Lemons, R. W., Garnier, J., Helsing, D., Howell, A., & Rasmussen, H. T. (2006). *Change Leadership: A Practical Guide to Transforming Our Schools*. San Francisco, CA.: Jossey-Bass.

Sample: Looking Inward: Your Commitment to Change

Lesson 3.2

Looking Inward: Your Four-Column Immunity Chart			
Commitment	Doing/Not Doing	Hidden/Competing Commitment	Big Assumptions
<p>I am committed to... <i>Raising student achievement of every student in my math class.</i></p>	<p><i>I don't take the extra time to analyze the various sources of data (test scores, homework, projects) and develop lessons using the data.</i></p> <p><i>I don't know how to interpret the test data and use the analysis for lesson design.</i></p> <p><i>I tend to use the same instructional strategies I have used in the past because I am comfortable with them.</i></p> <p><i>I don't really know what other strategies are available that would be appropriate for the needs of every student.</i></p> <p><i>I don't know what to do after I have all the data—it is overwhelming to think I have to meet the needs of every student.</i></p>	<p><i>I fear using the test data in an appropriate and efficient manner to help every student.</i></p> <p><i>I have great anxieties about my time to get this all done.</i></p> <p><i>I am not comfortable with new strategies when the old ones work OK.</i></p> <p><i>I am scared to change because I may feel failure in front of my students.</i></p> <hr/> <p><i>I am also committed to...not getting assistance to learn about how to analyze and use data in lesson design.</i></p> <p><i>I am also committed to...using only the strategies that are comfortable for me and that I have used before, regardless of their appropriateness.</i></p> <p><i>I am also committed to... the status quo in my teaching.</i></p>	<p><i>I assume that I will not be comfortable and successful with new strategies.</i></p> <p><i>I assume that I am not proficient with data analysis.</i></p> <p><i>I assume that I may not be competent using other strategies.</i></p> <p><i>I assume that the status quo is OK because I will never really get every student to be good in math.</i></p>

Adapted from: Wagner, T., Kegan, R., Lahey, L, Lemons, R. W., Garnier, J., Helsing, D., Howell, A., & Rasmussen, H. T. (2006). *Change Leadership: A Practical Guide to Transforming Our Schools*. San Francisco, CA.: Jossey-Bass.

Strand Three: Developing Self

3.3 Application Lesson

What is your message, and how will you hold yourself accountable?

Context

Strand 3 Lesson 3 In this final lesson, aspiring principals develop some strategies for formulating and communicating their commitment to spending time on instructional leadership. They also develop strategies for holding themselves accountable.



Overview

Purpose Aspiring leaders reflect upon what they've learned about time and define their "teachable point of view." This provides a capstone and a touchstone for time management ideas.

Description First, aspirants learn about the ideas behind a teachable point of view, or TPOV. Then, they watch a video that shows some principals delivering their TPOVs. Last, they develop their own TPOVs and practice delivering them to each other.

Note: Teachable Point of View and The Leadership Engine are registered trademarks of Tichy Cohen Associates.

Objective ➤ Plan how to change the way one uses one’s time, including adding value to both instructional leadership and management tasks.

Preparation

Prework article (assigned in previous lesson):

- Horton, J. and Johnson, S. *A Successful Point of View*. <http://www.samsconnect.com/makingtime/html/content/pointofview.pdf>

Materials

Handouts in this document:

- Information: Leadership Development: A Teachable Point of View (page 99)
- Worksheet: A Teachable Point of View (page 100)
- Rubric: A Teachable Point of View (page 101)

Video

- Sample TPOVs <http://www.samsconnect.com/makingtime/html/content/tpov.m4v>

PowerPoint files:

- Making Time 3.3 http://www.samsconnect.com/makingtime/html/content/Making_Time_3-3.ppt

Professor Preparation Copy handouts.

Student Preparation Complete of homework from Lesson 3.2.

Instructional Sequence

Presentation: Teachable Point of View (TPOV) (1:00) Note: Use the **PowerPoint file, *Making Time 3.3*** (on CD) to facilitate the lesson. Present **background:** Noel Tichy, author of *The Cycle of Leadership*, has written about TPOV, which is a set of ideas supported by values and driven with emotional energy and edge. Let’s look at these elements and think about how these concepts relate to your school.

Refer to the [homework reading assignment](#) (Horton, J. and Johnson, S. *A Successful Point of View*, on Internet) and ask them to describe the reason for, and main characteristics of, a TPOV.

Distribute [handout, Information: Leadership Development: A Teachable Point of View](#) (on page 99).

Present information on [Quantum Ideas](#): Quantum ideas are BIG ideas. They define how the organization – your school – will add value. Quantum ideas set direction and keep everyone focused on a common goal. It’s the job of a leader to monitor these ideas and ensure that they are current and appropriate. Effective leaders are skilled at assessing trends and changing realities – internal and external – and adapting their TPOVs accordingly. From quantum ideas flow incremental ideas – but today we’ll focus just on the big, quantum ideas.

Provide examples of big quantum ideas from your own experience in leading organizations, e.g., “These were my big quantum ideas: ...”

Review big ideas from the time management lessons (see PPT) and tie them to the concept of “quantum ideas.”

Present information on [Values](#): Ideas determine what the organization wants and how it will deliver. Values determine how people in the organization –your school – interact with each other and the outside world. Values must be aligned with your ideas – if your people embody these values, they will be able to achieve those big ideas. We’ll look at how your values support the ideas of your school.

Provide examples of values from your own experience in leading organizations, e.g., “These were the values I needed to embrace in order to achieve my ideas...”

Present information on [Emotional Energy](#): After leaders make the link between ideas and values, they develop ways to drive the results: by creating energy in others, and by maximizing transitions and teachable moments.

Provide an example of a turning point from your own experience—a time when you had to drive the vision and values, and how you did it.

Present information on [Edge](#): Finally, “Edge.” Edge is about the confidence and capacity to make tough calls – yes/no decisions based on your ideas and values. Leadership is about “working your edge” – facing hard facts, pursuing new opportunities, abandoning old ones and naming your non-negotiables.

Provide an example of an edge or non-negotiable in your organization and make a link to ideas and values.

Video: Sample TPOVs (0:30)

Introduce the [video, TPOV Examples](http://www.samsconnect.com/makingtime/html/content/tpov.m4v) (<http://www.samsconnect.com/makingtime/html/content/tpov.m4v>) explaining that the power of the TPOV comes from two things—the act of making it firm in your mind, and the act of delivering it extends the message to others. Show the video and ask participants to think about both of these aspects as they watch some principals deliver their TPOVs.

Discuss aspects of the presentations that were inspirational and analyze them to determine what made them inspirational. Discuss: What do you *know* about these people based on their TPOVs?

Application: TPOV Creation (0:15)

Distribute [handout: Worksheet: A Teachable Point of View](#) (on page 100). Ask:

- Consider all you've learned about yourself, instructional leadership and time management.
- Take a few minutes to write down your TPOV. For those who already have a TPOV, you might consider refining it based on what you've learned about instructional leadership and time.
- Focus on quantum ideas, values and edge. What *ideas* drive your time use? What *values* support your ideas? Where's your *edge* in driving those ideas?
- We'll assume, for now, that you all possess the emotional energy to rally your staff around your ideas and values.

Application: TPOV Presentation and Peer Review (0:45)

Distribute [handout: Rubric: A Teachable Point of View](#) (on page 101).

Ask people to work in groups of three. Present: The other two people are your "critical friends." After each person presents, the other two will give "warm" and "cool" feedback. "Warm" feedback highlights strengths and nascent opportunities. "Cool" feedback surfaces questions for clarification or notes where you were confused. Stay focused on TPOV. (30 minutes)

Large group debrief:

- What did you learn from this exercise?
- What were some of the differences between TPOVs?
- Where did you get stuck?
- Looking ahead, how might your TPOV serve as a filter or lens for decision-making?
- Looking at *right now*, how can you improve your time use and focus on instructional leadership? (15 minutes)

Emphasize that this is just an introductory activity to prepare you to continue to develop and refine your TPOV. Doing so takes time and reflection.

Discuss: In an earlier lesson, you created a schedule for the principal's time. Did the schedule you created earlier match your TPOV? Discuss in small groups.

Facilitate a summary of key points from entire series of lessons.

Follow Up

**Homework
Assignment**

N/A

**Portfolio
Assignment**

Distribute the [handout: *Portfolio Assignment*](#) (on page 102). Discuss the steps you expect, based on program guidelines.

Optional: Ask aspirants to tape a presentation of their TPOV and include it in their portfolios.

Information: Leadership Development: A Teachable Point of View

Lesson 3.3

Noel Tichy and Patricia Stacey formulated what they call the *Teachable Point of View* approach. They found that the most powerful learning experiences in leadership development occurred when leaders taught their own points of view. The process consists of two important activities: development of a teachable point of view (a description of what it takes to be successful in the organization and what it takes to lead others) and the creation of a dynamic story to convey the teachable point of view.

The teachable point of view has four critical leadership areas: ideas, values, edge and emotional energy. The following outline invites you to begin to develop your own teachable point of view.

Ideas

- What are your ideas about the future for schools in general, and your school in particular?
- What will make the school successful?
- What does the school do to create value for its constituents?
- What might it do?

Values

- What are the values of your school--the ones the school lives by?
- How do these values support the school's work to create value for its constituents?
- Are any of these values likely to impede future efforts to create value for its constituents?

Edge/ Emotional Energy

- That is, an unflinching readiness to face reality and the courage to act.
- What tough issues are you dealing with? What are the critical decisions you face?
- What holds you back?
- What might be the consequences of delayed decision-making?
- What do you do to keep yourself energized?
- Think of a time when you generated positive energy in a situation. What effect did this have?
- What do you do to motivate others?

Source: Sullivan, M. (2008). *Leadership development: A teachable point of view*. Palinet Leadership Network. http://pln.palinet.org/wiki/index.php/Leadership_development:_a_teachable_point_of_view

Worksheet: A Teachable Point of View

Lesson 3.3

Your teachable point of view.

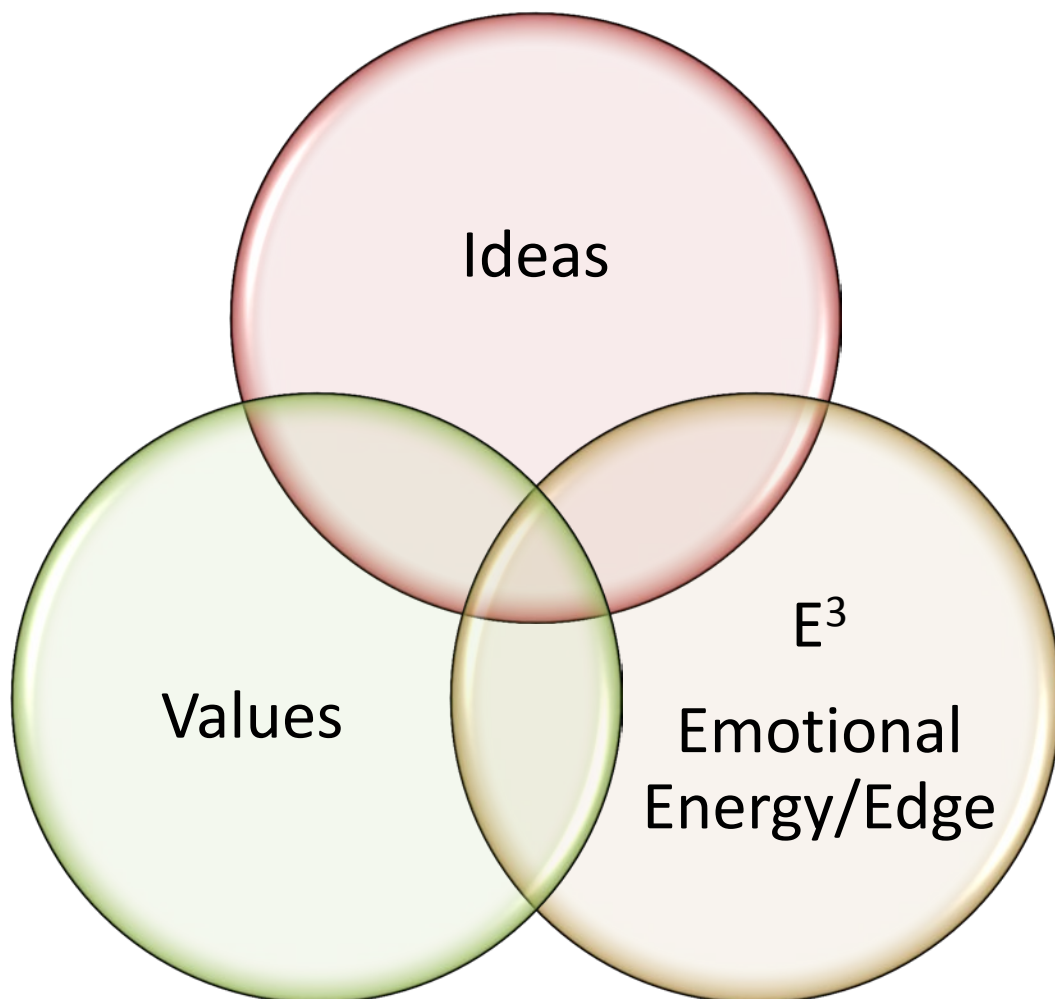
- What does it take to be successful in your leadership practice?
- What is required to motivate and lead others?

Your leadership story. Develop your story around these three elements:

- The case for change--why things cannot continue as they are
- Where we are going--the picture of a better future
- How we will get there--what we will have to do, stop doing, do differently to create the better future.

Next steps. Adapt your story as a framework for strategic planning:

- Share with staff (board, advisers, community served) and invite their thoughts.
- Plan specific actions consistent with your Leadership Story.



Rubric: A Teachable Point of View

Lesson 3.3

The Teachable Point of View (TPOV) is a concise and memorable statement leaders use to motivate individuals and organize the institutions with which they work. This statement, when shared with members of the school community, serves to align the community around a central goal that supports and improves instruction. Expression of the TPOV should communicate a leader's energy and edge, or ability to make tough decisions that define and protect the school's culture and instructional focus.

You will craft and deliver a lasting statement that:

- Embodies the ideas and methods which will drive the instructional strategy for your school
- Details the values and behaviors that will support these ideas.

Use the rubric below to assess your own TPOV or to give feedback to another person about a TPOV.

Satisfactory	Re-Do
<input type="checkbox"/> Statement clearly delivers leader's idea, vision and methods driving instructional strategy for the school.	<input type="checkbox"/> Does not capture vision and strategy for instruction.
<input type="checkbox"/> Statement demonstrates and models focus on values and behaviors supporting leader's idea.	<input type="checkbox"/> Focus on values and behavior supporting the vision is not evident.
<input type="checkbox"/> Statement is inclusive, forward-looking, inspirational and leaves a lasting impression.	<input type="checkbox"/> Statement is not future oriented nor inspirational nor memorable.
<input type="checkbox"/> Language is clear and concise.	<input type="checkbox"/> Unclear and loose language
<input type="checkbox"/> Tone and style are inspirational, engaging and dynamic	<input type="checkbox"/> Tone and style do not convey inspiration and engagement, and fall flat.
<input type="checkbox"/> Language and posture communicate leader's energy, edge and perseverance.	<input type="checkbox"/> No or little evidence of energy and urgency in language and posture.
<input type="checkbox"/> Language, tone and style are appropriate for selected audience.	<input type="checkbox"/> Inappropriate language, tone, or style

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Portfolio Assignment

Lesson 3.3

Complete the following steps for your portfolio assignment:

Gather data on your own time use.

- You may do this manually, or you may use Time Track, which is available at www.samsconnect.com.
- Document what steps you are taking to:
 - Increase instructional time.
 - Bring the most value possible to the instructional leadership time you have.
 - Bring instructional value to essential management tasks.
 - In an internship or other practice setting, document what you do to:
 - Increase knowledge and appreciation for instructional leadership time
 - Work on skills development for instructional leadership tasks. (chart from 3.1)
 - Work on achieving a work/life balance.
 - Work on implementing systems for operations.

Additional Videos and Materials from SamsConnect.com

- Mike Rutherford
 - [Building a Culture of Trust \(HD Video\)](#)
 - [Five Minute Feedback \(HD Video\)](#)

- Willow Sweeney & Paul Bernabei
 - [Top 20 Teachers: Above the Line \(HD Video\)](#)
 - [Top 20: The Frame \(Handouts\)](#)
 - [Top 20: Help Others \(HD Video\)](#)
 - [Top 20: Stupid in the Box \(Handouts\)](#)
 - [Top 20: Culture of Safety \(Handouts\)](#)

- Brenda Anderson - [SAMs Got Data \(Powerpoint Slides\)](#)

- Pam Salazar – [Unlocking Students Potential \(HD Video\)](#)

- Deli Moussavi-Bock – [The Art of Feedback \(HD Video\)](#)

- Debbie Daniels – [Assessing Learning Environments \(HD Video\)](#)

- Bert Hendee – [Leading Change \(Powerpoint Slides\)](#)

- Carol Lensing – [The Energy Bus \(Powerpoint Slides\)](#)

- Kendra Washington-Bass – [The Power of Protocols \(HD Video\)](#)