SECTION 3: STAFF ROLES


Administrator Leadership Institute
Kurt Engelmann/Tara Davis

Calendar for Full Implementation of Direct Instruction (DI)

Focus	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
SETTING EXPECTATIONS												
2 Student performance expectations	━	━	━	━	━	━	━	━	━	━	━	━
3 Staff Roles	━	━	━	━	━	━	━	━	━	━	━	━
4 Scheduling and Materials										━	━	
5 Assessment, Placement, and Grouping	┈	┈		━		┈	━	┈	┈			
6 Setup and materials management	━	━	┈	┈	┈	┈	┈	┈	┈	┈	┈	┈
7 Measuring mastery	━	━	━	━	━	━	━	━	━	━	━	
8 Student behavioral expectations	━	━	━	━	━	━	━	━	━	━	━	
MONITORING INSTRUCTION												
9 Problem-solution orientation	━	━	━	━	━	━	━	━	━	━	━	━
10 Preservice checkouts: initial DI delivery skills	━											━
11 Practice sessions: preparing to teach to mastery	━	━	━		┈	┈	┈	┈	┈	┈		
12 In-service sessions: targeting critical skills		━	━		┈	┈	┈	┈	┈	┈		
13 Collected data: check on mastery and progress	━	━	━	━	━	━	━	━	━	━	━	
14 2-Minute/5-Minute observations	━	━	━				━		━			
15 Extended observations				━	━							
RESPONDING ACTIVELY												
16 Problem solving sessions using data	┈	┈	┈									
17 Remedies			━	━	━	━	━	━	━	━		
18 Prioritization: which problems take precedence?	━	━	━	━	━	━	━	━	━	━	━	
19 Overall assessment: taking stock					━			━			━	
20 Using resources	┈	┈	┈	┈	┈	┈	┈	┈	┈	┈	┈	┈
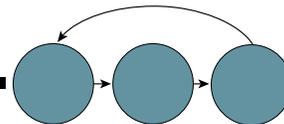
Minimum Personnel Required for a Full-Immersion DI Implementation

Personnel Types and Their Functions

Principal – functions as instructional leader & decision-maker

- Understands and supports the Direct Instruction implementation.
- Assigns personnel and explains their roles in the implementation.
- Conducts classroom observations.
- Engages in data analysis of student performance.
- Evaluates personnel on their performance implementing DI.
- Takes action to solve problems in a timely manner.

Building Coordinator – functions as the lynchpin to the implementation

- Provides full support to teachers (schedule, placement, grouping, materials).
- Coordinates data collection and analysis.
- Does coaching, classroom observations, and feedback commensurate with training received.
- Teaching responsibilities are limited and targeted (one DI group for half a year).
- Needs to focus on DI implementation, not other administrative tasks (except for very small implementations).
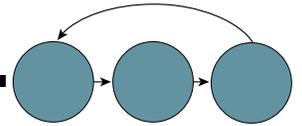
Sufficient number of *teaching personnel* – function as teachers and data collectors

- Instruct children effectively.

- Motivate students to learn.

- Manage instructional time efficiently.

- Collect and monitor data.

- Provide remedies.

- Celebrate achievement.

Trained *Substitutes* – also function as teachers and data collectors

- If not, then who teaches children? Acceleration suffers.

Peer Coaches – function as the keys to sustainability

- Build up capacity, support implementation.

- Identify problems through data.

- Suggest remedies.

- Provide solutions.

- Assist during practice sessions.

- Conduct in-class observations according to their expertise.
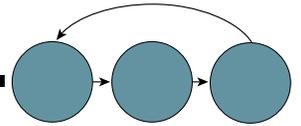
A Day in the Life of an Effective DI Principal

A principal who wants to implement Direct Instruction (DI) effectively does the following on a regular basis:

- Reviews with the building coordinator and other staff members the priorities of the day or week.

- Greets students as they arrive at school and sets positive expectations for students.

- Monitors the halls to ensure that students are getting to their classrooms in an orderly fashion and reinforces students who are acting according to the rules.

- Performs 5-minute observations in classrooms at the beginning of each of the DI instructional periods.

- Verifies the performance of students who have reached milestones and announces their accomplishments over the P.A. system (outside of DI time).

- Meets with teachers during their planning periods and discusses the performance of students.

- Drops in on a practice session or in-service and ensures that the appropriate staff members are in attendance.

- Reviews with the building coordinator the accomplishments and impediments of the day and sets priorities for the next day or week.
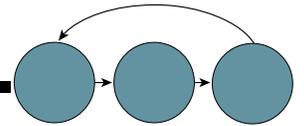
Direct Instruction Model
Job Description: DI Building Coordinator

In the Full Immersion model, the DI Building Coordinator needs to be a full-time person except in the case of small schools (< 100 students). This person is critical to the implementation of Direct Instruction. The Building Coordinator ensures that teachers have adequate schedules, materials, and technical assistance. The Building Coordinator spends as much time as possible in classrooms, observing and collecting information about student performance. The Building Coordinator fulfills the role of head coach. In order to fulfill this role, the Building Coordinator must also teach a group of students to know how to achieve mastery and acceleration as well as the teachers do.

The following pages outline the role of the Building Coordinator and delineate which tasks must be coordinated with the external support provider (ESP) or Principal and which tasks the Building Coordinator carries out independently by the end of the first year of implementation. Over time, the building coordinator assumes more activities that were previously performed jointly with the ESP or the Principal.

> The following actions must be coordinated with the actions of the **External Support Provider (ESP):**

Materials

1. Order and monitor adequacy of DI program materials and DI data forms needed.
    - tell staff how much advance notice to give when asking for more materials or the next level of the program.
    - keep extra workbooks on hand for new students.
    - order, copy, and organize Reading Mastery Signature Edition (RMSE) Grade K and 1 independent work.
    - provide lesson progress charts (LPCs) and test summary forms to each teacher; provide thermometer charts for each classroom for every subject area.

2. Determine necessary DI programs for the site.
    - Order sufficient materials throughout the year well enough in
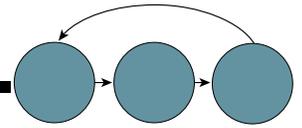
advance so instructional groups can continue to make progress.

Organization, Scheduling, Placement

3. Provide placement testing for most groups before they move to a new level of the program.
4. Establish and update teaching schedules and class lists. The building coordinator must collect and organize scheduling and roster documents for easy access by the ESP throughout the school year. These documents should be revised whenever a change occurs.
5. Monitor ongoing adequacy of schedules and determine if teachers are following schedules. Check that the amount of time students need for making progress in various DI programs is provided. Check that second reading periods are provided for all students below benchmark. Check that transition times between instructional activities go quickly and smoothly.
6. Monitor numbers of students in instructional groups and total numbers of groups. Check size of high, medium, and low groups. Check numbers of groups against the schedule and the number of people available to teach.

Student Performance

7. Examine data collected over time (e.g. mastery test summaries).
8. Change placements of individual students or groups of students, when needed. Ask teacher for data that helps justify these changes.
9. At regular intervals, identify need for regrouping.

Feedback, Coaching, and In-service

10. Establish plans for teachers who did not receive pre-service or in-service training.
11. Identify need for inservice based on student performance data, classroom observations, or needs expressed by teachers.
12. Teach teachers what mastery looks like, how to determine satisfactory performance, and how to celebrate students' achievement.
13. Work with teachers during class/ model teaching behaviors.
14. Construct solutions for problems.

Communication

15. Maintain desired communication with building principal.
16. Make sure new coaches attend coaches' training.
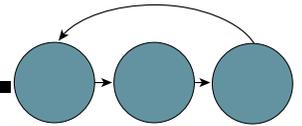
The following tasks are completed in cooperation with the **building principal:**

1. Answer parents' questions regarding the project and the data regarding their children's learning.
2. Identify needs for improvement in the school-wide management system.
3. Identify grade-level or program-level coaches.
4. Ensue that teachers and paraprofessionals receive the training they need to be successful.
5. Observe and coach teachers on identifying problems and implementing solutions.
6. Discuss classroom data during the conference call with the ESP.
7. Provide follow-up feedback from conference calls or site visits to teachers.
8. Implement solutions for problems.

The following tasks are the sole responsibility of the **building coordinator**:

Organization, Scheduling, Placement
1. Create means of organizing teaching schedules, class lists, materials, grouping information, blank data forms, data for each classroom, testing summaries, and in-service materials.
2. Oversee beginning-of-the-year placement of students in programs. To assist in making these decisions, examine available data from the previous year.
3. Oversee placement testing for new students throughout the school year.

Student Performance
4. Assure that data is collected and made accessible and/or posted in a uniform manner in each classroom.
5. Oversee sending complete classroom data to the ESP. Follow up with teachers if data is missing or incomplete.
6. Prepare for the weekly conference call with the ESP by identifying potential problems. Be prepared to discuss what has already been done.
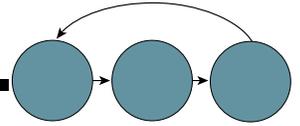
Feedback, Coaching, and Inservice

7. Work with teachers outside of class.
8. Schedule in-class observations of student performance.
9. Monitor specific practices for celebrating achievement.
10. Identify positive role models for other teachers to visit.
    - identify teachers who manage positively and effectively

Communication

11. Determine ways to acknowledge, reinforce, and thank volunteers who work in the building to help implement DI programs.
12. Set aside a regular time in the schedule to follow-up with teachers after conference calls, after coaching, and before the next phone call.
13. Arrange with the principal, coaches and the External Support Provider a weekly time for conference calls to occur.
14. Send data enough in advance for the External Support Provider to review the data before the phone call.
15. Check with grade level coaches for in-service suggestions.
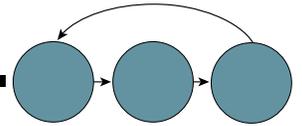
DI Teacher Responsibilities

In a Direct Instruction (DI) implementation, teachers carry out many procedures to help students achieve mastery. Teachers need to be proficient at helping students become accurate and fluent on what has been taught and accelerating students when appropriate. They must also be efficient with time.

Ultimately, teachers are responsible for all details of teaching, including grouping students, following schedules, teaching and firming the full range of students in all subject areas, and managing and reinforcing students so they are excited about learning. However, in a full immersion implementation, building coordinators, coaches, and external support providers make decisions about grouping, placement, and scheduling. Teachers should consult with these personnel before making changes in these areas.

For a full-immersion implementation to work, all teachers must follow these procedures:

1. Teachers complete a week of preservice training before school starts the first year and periodic inservice sessions thereafter.

2. Teachers follow pre-established schedules for teaching all groups and all subjects.

3. Grouping for instruction is strictly homogeneous. If either grouping or placement seems to be an issue, if even for one student, teachers must talk to building coordinators and external support providers as soon as problems are suspected.

4. Teachers regroup students regularly, but only in consultation with building coordinators and external support providers. Specifications for regrouping should be in writing.
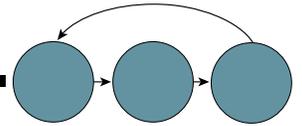
5. The expected lesson progress of students in a given group is projected according to the entry performance level of the students and the program being taught. In upper levels of the programs, lessons tend to take longer.

    ☞ Teachers must make sure that students in **lower** levels of the programs meet the following guidelines:

    •   High groups achieve 8 to 9 lessons a week at mastery.

    •   Middle groups achieve 7 to 8 lessons a week at mastery.

    •   Low groups achieve 5 to 7 lessons a week at mastery.

    ☞ For students in **higher** levels of the programs, teachers must make sure that students complete a lesson a day (but not at the expense of mastery).

6. Teachers must meet specific criteria for student performance for each lesson (covered in more detail in later sections).

    ☞ Students will not perform perfectly when they first respond to lesson tasks, but they should be firm on all parts of the lesson by the end of the instructional period.

7. Teachers become proficient in identifying problems in student performance through expert feedback based on observations and data review.

8. Teachers implement techniques assigned by anyone filling the role of coach (principals, external support providers, building coordinators, or grade-level coaches) who has been thoroughly trained in DI coaching.

9. Teachers must consult with building coordinators and/or external support providers before taking students back several lessons or skipping ahead several lessons.
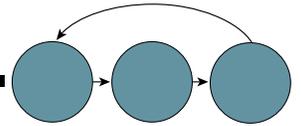
10. When students complete a level of a program at mastery, they usually begin the next level. Teachers start the next level after consulting with the building coordinator and/or external support provider.

11. Teachers must provide supplemental seatwork at the same level (not a more advanced level) of difficulty as the material in which students are being taught.

12. When teachers use non-DI programs, the strategies taught must be consistent with those of the main DI curricula being implemented, even if the programs are being used before or after school. Students must experience consistencies in lesson content, instructional level, and time allotments.
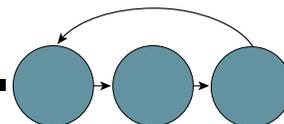
COACHING RESPONSIBILITIES

| COACHING LEVEL	SKILLS LEARNED	SUPPORT PROVIDED TO TEACHERS
Level A	• Analyze data: LPC, STS, Independent Work • Participate in problem solving sessions	• Improve written records • Rehearse with teachers
Level B	• 5-minute observations • Show-off lesson observations	Do all of the above plus: • demonstrate formats or lessons in the classroom • provide inservices
Level C	• extended observations	Do all of the above plus: • team teach (or otherwise intervene) • provide solutions
Level D	• participate in data analysis committee meetings • write effective data analysis reports	Do all of the above plus: • monitor solution for effectiveness • collaborate with team re: additional solution(s), if necessary
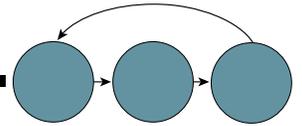
What to do When Your External Support Provider Comes on Site

In order to implement the full immersion model of DI with fidelity, schools and districts will require the assistance of an external support provider (an implementation company or outside consultant.) The external support provider (ESP) should be able to help you in all areas of implementing the model.

When the ESP comes on site, schools and districts should make the greatest use of his/her time and input. Specifically, the following should occur:

   I.   The Building Coordinator and Principal should be as prepared as possible for the ESP's visit:

- All current data should be readily available for the ESP to analyze.
- The ESP should be provided with an up-to-date map of the building and a staff roster indicating the DI instructional groups that each staff member teaches.
- The Building Coordinator and Principal should ensure that all major problems identified by the ESP in his or her last visit have been addressed.
- The staff should be fully informed that the ESP will be on site to work in classrooms.
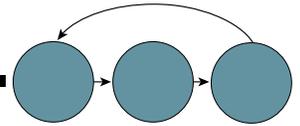
II. The school's Building Coordinator should accompany the ESP in all activities. The Building Coordinator should

- shadow the ESP when she/he visits classrooms,
- takes notes when the ESP provides feedback or suggestions,
- and provide information to the ESP as needed.

The Building Coordinator will work with the ESP all day long, not just during DI instructional time.

III. The principal should also accompany the ESP in classrooms, and the principal should be available to meet with the ESP outside of DI instructional time to discuss problems with student academic progress and their remediation.

IV. Teachers should teach normal lessons unless the ESP specifically requests otherwise. Teachers should not rehearse lessons with students in advance of the ESP's visit unless requested. (They can, of course, rehearse the presentation without the students present.)

If possible, the school should develop an alternative schedule when the ESP is on site. This schedule should spread DI instructional time throughout the day so the ESP can spend more time in classrooms helping teachers.
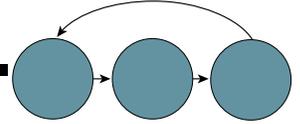
Teacher Interview Simulation

An important step in establishing expectations for teaching staff is to outline fundamental aspects of Direct Instruction (DI) in the job interview. It is much simpler and more effective to clarify to teachers the DI expectations before they are hired than it is to try to clarify DI expectations after they have been hired.

Step 1: Setup
For this activity, participants are divided into groups of three or four. Each group separately identifies the four most important expectations related to Direct Instruction to review with candidates for teaching positions in your schools. Then the group will simulate a job interview for a teaching position. One member of the group will be the candidate for the position. The others will be on the interview team.

Step 2: Identify Key Expectations
List the four most critical Direct Instruction expectations your group has identified:

1. _____

2. _____

3. _____

4. _____

Step 3: Begin the Interview
To get into the proper frame of mind, interviewers may ask general questions about the candidate's professional experience, such as

Years teaching:
Range of grades taught:
Where the candidate works now:
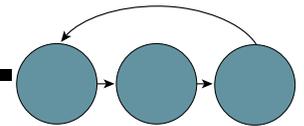
Step 4: Clarify the Direct Instruction Expectations
Then, interviewers will clarify the expectations for the position regarding the delivery of DI. They will explain the four expectations identified as the most critical by the interview team and ask whether the candidate is willing to meet each expectation. (Member of the interview team can take turns explaining the expectations.)

Examples of Questions to Pose
Questions to ask the candidate can be adapted from the following list of expectations as well as from the group's own list.
Is the candidate willing to participate in an implementation of DI where the teacher performs the following daily?

- reads from a script;
- practices the script before instruction to ensure familiarity with the wording and format of each exercise;
- follows pre-determined schedules for delivering DI;
- uses DI programs exclusively to teach selected subjects;
- signals to students on items to indicate they will respond in unison;
- corrects any student response errors immediately to ensure student mastery of the content;
- uses positive behavior management techniques that involve giving praise and points to students for completing tasks;
- receives frequent in-class coaching and feedback from the building coordinator and external support provider;
- teaches students who are grouped homogeneously across classes in the school and re-grouped by the building coordinator or external support provider as their performance indicates;
- records data on student performance in forms provided and submits the completed forms to the building coordinator on a weekly schedule.

Step 5: Rotation of Roles
The group should repeat the mock interview at least once after switching the role of candidate and interviewer. This will allow the participant who played the role of the candidate to get experience playing the role of an interviewer.

HOW PRINCIPALS CAN SUPPORT DIRECT INSTRUCTION EFFECTIVELY

HOW PRINCIPALS CAN SUPPORT DIRECT INSTRUCTION EFFECTIVELY

Working as the principal of a school implementing Direct Instruction (DI) requires closer contact with teachers and students than traditional programs require. This is because the principal must fulfill the role of the instructional leader of the school and expend considerable time, energy and attention to ensure that student performance is maximized with the DI approach. The principal's duties are divided into ten specific responsibilities, discussed below. Note that you are not expected to be proficient in all of these categories during the first months of the DI implementation. Personnel from the National Institute for Direct Instruction (NIFDI) will work with you and assist you on each of them.

1. Establish the critical components of the model.

In order for the school to be successful, the school needs to be set up to implement the comprehensive Direct Instruction model fully. The critical components of the model are listed in the handout, *Essential Elements Of A Successful Implementation*. These components include establishing proper timetables, ensuring that all students have been placement tested in the DI programs and grouped for instruction with other students having similar placement test results. The principal should ensure that teachers understand these critical components and their duties as part of the DI model.

2. Conduct classroom observations.

The effective principal conducts classroom observations daily. These occur early in the school day and show whether teachers are starting on time and following the program. They also show whether students are performing well and following the teacher's directions.

Ideally, you should make at least 3-4 unannounced observations per day. (Observations are unannounced in order to get a better idea of what teachers and students are probably doing each day.) Each observation requires only about 5 minutes. During each observation note what is going well, but also problems. (The only way we can improve what's occurring in the classroom is to focus on problems.) A shorter, two-minute observation focuses exclusively on student engagement in the classroom.

NIFDI will work with you on a schedule for observing different classrooms after each visit or conference call. The schedule will change as issues arise.

3. Accompany NIFDI personnel on classroom visits.

When NIFDI personnel come on site, it is important that you and the building coordinator (i.e., API, instruction coach, designated lead teacher) accompany the implementation manager and project director/consultant on their tour of classrooms. This will help acquaint both of you with the various procedures and problems that must be prioritized and solved for the school to become successful. Your familiarity with the specific problems observed not only make the process of solving these problems more graphic, they also show why the remedy is taken, why monitoring by the building coordinator is necessary, and why you need to be in communication with both NIFDI personnel and the building coordinator with respect to progress in solving these problems.

4. Participate in data reviews and conference calls.

You are a key participant in the conference calls with NIFDI personnel as they review implementation problems and student performance weekly. Each review addresses previously identified problems and the implementation of remedies to solve these problems. A second purpose of the weekly phone calls is to identify new problems. Some problems are identified by the implementation manager's analysis of students' performance data on lesson progress and mastery. Other problems are identified by you or the building coordinator through direct observation.

5. Implement recommended remedies.

The outcome of data reviews is a list of recommendations primarily for what the building coordinator is to do during the next week. Sometimes, you will have a role to play in these assignments. For instance, you may have to make it clear to a teacher that she is expected to start teaching the first group on time. Sometimes, you will have to make announcements about specific rules or routines students are to follow. Progress on these issues is discussed during the next week's conference call.

6. Act on Red Flag items and teacher compliance issues.

Some problems can't be solved in a timely manner. NIFDI is committed to solve problems of poor instruction as quickly as possible, but there are often situations in which corrective action either can't be taken or proves to be ineffective. The rule for such problems is that if the remedy for the problem is not implemented within 3 weeks of the date on which it was supposed to be implemented, the problem becomes a red-flag problem. As such, it demands special attention so it is discussed at the next data reviews as a high priority. For

these problems, the NIFDI home office becomes involved in case strategies involving upper administration are implied by the problem.

7. Meet weekly with the building coordinator (i.e., API, instruction coach or designated lead teacher).

To assure that you have current information on the problems that are being remedied, you need to have a weekly meeting with the to review progress. The best time is three days before the next data review. The meeting does not have to be formal or exhaustive. In fact, the only important issues are problems that are not proceeding as scheduled. The primary reasons for scheduling routine meetings with the building coordinator are to assure that progress is being made in solving extant problems and to identify situations that may require your involvement (such as a teacher who refuses to meet with the building coordinator).

8. Monitor the building coordinator's performance.

Particularly during the early stages of implementing DI, you need to work closely with the building coordinator. One purpose is to assure that you and the building coordinator are familiar with the problem situations and what is happening to resolve the problems. The building coordinator's responsibilities are specified in *Responsibilities for Building Coordinators*. The simplest practice to assure your efforts are coordinated is to perform 5-minute observations of problem situations with the building coordinator. Even if the building coordinator is very effective, you need to review what the building coordinator is doing. Not only will these interactions inform you about the status of instruction, but it will also provide the building coordinator with support for doing a difficult job.

9. Report on problems.

As a result of your observations and interactions with the building coordinator, you will discover problems that had not been identified previously. This is a very important step. Sometimes the solution to these problems will be obvious. For instance, a teacher does not start lessons on time. You could provide the remedy by telling her that she is expected to start on time. However, even if you correct the problem, it's a good idea to share that information during the next data review. The more the implementation manager and the project consultant know about what teachers know, the more effective they will be.

For more complex problems you observe, don't try to provide a remedy. The best plan is to report them to the building coordinator and make sure that they are discussed during the next data review. For instance, you may observe that posted data in a classroom doesn't seem to make sense; the top instructional group has completed only 6 lessons in the last 12 school days. You don't have an opportunity to talk with the teacher, and you are not sure whether the group's performance is problematic. Present the situation to the building coordinator. If it proves to be a problem, report it during the next conference call. What you don't want to do is ignore a possible problem. If it is a problem, it won't go away and probably will get worse.

10. Announce and recognize academic achievement.

The goal of the full immersion DI model is to accelerate student performance as much as possible and assure that students are proud of their achievements, themselves and their school. The first step in achieving this goal is to make it clear to students that everybody who works with them, from the principal to the instructional assistants, believes in the students' capacity to learn.

The second step is to help students succeed. The third is to celebrate students' achievements.

On the school level, there are two primary vehicles for showing that the achievements of students, groups, and classes are recognized: the daily announcements you make, and scheduled celebrations and events that recognize the students' achievements.

In traditional schools, most daily announcements address routine issues. In a school implementing DI, however, some announcements should address student success. These announcements should cover events such as:

- a group completing a level of a program,
- a group beginning a new story book,
- every student in a group receiving a perfect score on a test,
- a classroom going farther in the reading sequence than any previous class has achieved,
- students in a class attaining their thermometer chart goals.

In addition to the announcements, *achievement recognition events* should occur several times a year, during which students receive medallions or other symbols representing critical accomplishments.

You and the building coordinator need to arrangement these announcements and recognition events. The first step is to implement the program *with fidelity* so you can receive newsworthy information from teachers!