

CONVERSATION GUIDE

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*“We come to praise; we come to learn;
we come to have conversations about practice”*

–Frank Lyman

Based on research and tools from

[Glickman](#), C. (2003). *Leadership for learning*. Alexandria VA: ASCD

[Bloom](#), G.S., Castagna, C. L. , Moir, E., & Warren, B. (2005) *Blended coaching: Skills and strategies to support principals*. Thousand Oaks, CA.: Corwin Press.

Special thanks to Jim Warnock of *Research for Better Teaching* for input.

Note on pronouns: We have not fully converted to pronoun use for persons who identify they and their as pronouns of choice.

OVERVIEW

A conversation (formal or informal) that follows an observation (also formal or informal) has several components that include preparation for observation, observation with tool that collects evidence, data analysis and preparation for conversation, and, finally, the conversation. Think about the parts of the conference as we think about parts of a lesson and “task analyze” the approach. Obviously, the conversation following an observation is premised on **establishing trust between the teacher and the observer**. Trust is enhanced by the observer’s ability to have a substantive reflective conversation about practice and provide useful **data and coaching questions** that support the teacher’s reflection.

Note that the conversation following a relatively short observation (10-20 minutes) may be different than the actual formal post-conference for evaluation purposes. Because the formal process of evaluation in a state or district process requires written evaluation using a prescribed format, that conversation may require a different process than a conversation following an informal observation. However, an administrator can use the informal observations to build a set of evidence that can serve both the teacher and the administrator for the formal evaluation process. Through observations and conversations that occur throughout a school year, sustaining trust in the total process can deepen through frequent observations and conversations about practice. A key guideline: Follow-up conversations should be held as close as possible to the date of the observation.

There is no one right way to have a conversation. However, the formats we introduce are useful for **most** conversations. Some conversations require coaching moves, as the teacher may have not made changes in practice after several attempts to observe and provide feedback. Or, in some cases, a teacher has done something that is egregious which requires administrator intervention. As one administrator said: *Every*

principal has to analyze the staff and decide how you can have a coach role and when you have to be clear about your administrator-evaluator role and have someone else on staff take on the coaching role.

The suggestions offer guidance, but not “rules”. Every teacher is different, and knowing how each teacher learns/thinks is vital to setting up the trusting relationship necessary for any conversation.

NOTE: See **hyperlinks in the text for deeper explanations**.

GENERAL PREPARATION FOR CONVERSATION AFTER OBSERVATION

The primary objective of the conversation is to **support the teacher to (1) analyze the data from the observation; (2) make decisions about what s/he proposes to change; and (3) make a clear plan to improve instructional practice**. We, as administrators and coaches, have been schooled to give “feedback”, and teachers often say they want feedback. However, edPIRATE posits that what teachers want is more consistent and deeper attention to their teaching so that the conversation uses the evidence from the observation to provide a “tailor-made” observation and conversation process (Paryani, 2019). Thus, the administrator’s objective is not to give feedback about what the administrator thinks should change. The main objective is to support the teacher to talk about his/her practice so that s/he can make decisions about what to change. Typically, with veteran teachers, the observer can proceed and engage in cognitive coaching, supporting the veteran to draw on his/her knowledge and skill base to make decisions. For novice teachers that may be different; they are new to instructional practices. Thus, supporting their analyses and decisions about changing practice(s) is often necessary as they do not yet have a repertoire of knowledge and skills to fully make decisions.

If the observation and conversation are used for the formal observation required for the evaluation process, there is considerable value in a substantive pre-observation or planning conference. A fruitful planning conference supports the teacher to have a more thoughtful, well-planned lesson and a more productive post observation conversation. Attached is a guideline for conducting a planning conference that moves teacher thinking from the activity teaching to the learning objective/outcome of the lesson.

The following are steps after the observation:

Step One: ANALYZE THE DATA/EVIDENCE from observation

Any analysis is premised on an observer collecting observable, **objective**, non-judgmental data to analyze in preparation for the conversation. Analyzing the data helps the observer decide on an objective/purpose for the conversation. Even if the district evaluation tool does not require evidence, effective administrators should use evidence-based observation tools (and not checklists or other judgmental tools).

To prepare for the conversation with the teacher, the administrator can make choices about analyzing the data: send the teacher the data before the conversation, analyze for the first time when you meet together, or share what you, as an observer, have analyzed. There is no one right way to present the data, but this question is critical: What factual evidence does the observation yield?. The important part is that you use objective data and share that data/evidence with the teacher. The data should not include any notes to yourself or questions that may indicate pre-judgment.

Step Two: Think about the APPROACH for the conversation.

The approach, based on [Glickman](#), informs the kinds of questions you ask and how you ensure that the teacher makes decisions about what to do. Two of the four approaches apply to most teachers.

- **Direct-informational:** Teacher who needs more information in order to make decisions about an improvement choice. In other words, the knowledge base of the teacher may not include what s/he needs to know to make improvement. Typically, a novice teacher or a veteran who does not know current thinking can benefit from coaching. If the conversation requires that you provide specific instructional direction, ask permission to be instructional -- *Is it all right if I provide instructional options?*
- **Collaborative:** Teacher who is knowledgeable about practice and for whom the evidence is supportive. The conversation is two-way. The responsibility of the observer (now coach) is to ask the kinds of coaching questions that elicit teacher talk and teacher decisions.

Think about the range of coaching stances from [instructional to facilitative coaching](#), remembering that **transfer to teacher practice** is the objective. **GATHER MATERIALS** Something may emerge from the data analysis that the observer does in advance that may require materials for deeper understanding or next steps. Prepare materials with a copy for you and for the teacher. You may or may not use in the conversation; use your judgment about providing materials. Alternatively, keep a list as you talk and summarize the materials you can provide to the teacher.

Step Three: PREPARE AN OPENING QUESTION FOR CONVERSATION: BEYOND ASKING “HOW DO YOU THINK THE LESSON WENT?”

Preparing a **thoughtful opening question** for the conversations can alleviate the tension that an administrator sometimes feel at the beginning of the post-observation conversation. The question depends on the type of post-conference approach that you use: (1) direct-control (2) directive-informational (3) collaborative or (4) nondirective (Glickman, 2002). Most conversations fall in category 2 or 3 of Glickman and correspond to the [instructional to facilitative range of coaching](#) in the *Blended Coaching* (Bloom et al., 2005).

Depending upon the type of approach you use (See [Glickman chart](#)), start with this introduction:

“We had decided before the observation that I would look at _____ (or use ____ tool to observe your class). What I would like to do is look at the data together and see what we observe.”

Step Four: ASK FOLLOW UP QUESTIONS

Ask follow-up coaching questions during conversation. As much as possible, do not put your 2 cents worth in the conversation; rely on coaching through paraphrasing moves/questions.

See coaching questions below in [Coaching for Equity: Paraphrasing](#)

Step Five: Summarize and Debrief (optional)

Summarize

End the conversation with a decision about what is next in terms of teacher practice and a possible follow-up observation. Often, the observer can use the summarizing and organizing function to summarize what has been said (see [Coaching for Equity: Paraphrasing](#)). If the conversation is a part of a formal evaluation process, the administrator must translate the objective observation and conversation to the district or state forms.

Discretion is advised at this step of the process as the collaborative process in which you have engaged has the potential to drift toward hierarchical (because of bureaucratic requirements or because you may revert to feedback and telling). Depending on the teacher need and assessment of Glickman types, you may have to engage in a direct-control conversation with a teacher who needs improvement.

Use summarizing statements/questions:

- Let's review the key points of the discussion.
- What next steps are you taking? OR The steps I heard you talk about are _____
- What evidence will you look at to ascertain if those next steps are working? OR The evidence I need to collect next time I come is _____
- How does this connect to student learning/equity? I heard you say ____ and that clearly connects to student learning/equity in these ways: _____

Debrief

Debriefing may or may not feel like the right thing to do. As an administrator, you are model reflection. Thus, depending on the situation, ask for feedback on the structure, tone, and usefulness of conference, using the + and ◀ (delta=change) format or use a written feedback form for the teacher to reflect on and complete if s/he wishes. However, In some cases, debriefing would not be an appropriate choice.

OTHER CONSIDERATIONS

● Set the tone: Of course, you want the conversation to go as well as possible, so make the teacher feel comfortable. Many administrators recommend having the conference in the teacher's room, or, if it is your office, then probably the administrator sits by the teacher or sits around a table with the teacher. Unless it is a direct control conversation (Glickman) in which you have to set a distinct hierarchical tone with teacher, do not sit behind your desk. Assume best intentions and assume that if the teacher knew to do anything else, s/he would do it. Refrain from making judgments; instead seek reasons behind problems or stated explanations. Probe, but do not prejudge. Use coaching questions. Indeed, if you are practicing having a different type of conversation for the first time, then be transparent and share that with the teacher.

For example, I am practicing having a different kind of conversation with you about the observation, one that relies on the evidence I collected and analyzed and one in which you decide what your next steps are. I have ideas, of course, but what I am most interested in is your decisions about what you want to do next as a result of analyzing the evidence from the observation. As always, I only observed a slice of your teaching practice, so, if there are particular classroom circumstances with students or lesson, please tell me as we proceed.

- **General rule of thumb: Teacher should do most of the talking.** Acknowledge ideas, even if you do not totally agree. Typically, do not start conversations with WHY questions. Think time or silence is OK as it allows time for collecting thoughts and thinking about what happened. Use paraphrasing to encourage teacher talk.
- **Language.** In general, avoid “you” statements. Convert to “we” or “I” statements. Use open-ended questions that produce explanations and ideas, not short answers. See advice on question stems that can help to clarify, paraphrase or probe.
- **Body Language:** The process should be viewed in general as a **conversation between professionals**. Be aware of the ways you position yourself as the administrator. Again, for the “hard” conversations, you have to think carefully about what you want to communicate and that may require a different stance, format (directive-control) or positioning (behind your desk).
- **Procedural Advance Organizer (AO):** Explain the purpose and the parts of the post conference and ask for concurrence. You want to be open, but purposeful. Think carefully about the objective of the conversation. You are creating a mini-lesson plan for conducting the conference. Be open, as you are in a classroom, to the student input and changing direction, but don't just drift from one question to another, getting surface responses. Note: *This seems like a lot of planning at first, but as you gain experience, the planning lessens and parts of this become more automatic.*
- Use **teaching and learning language** – naming practices specifically as much as possible. That helps the teacher build structures and you develop a common language for teaching and learning in your school.
- **Remember to put equity at the forefront of the conversation and push the teacher to think about equitable access and even if the observation was not specifically about this.** How does the evidence demonstrate equitable or inequitable practice? How can you direct every part of the conversation toward equity?

Glickman Coaching Stances

You need to consider the teacher with whom you are conferring. Most teachers fall into the direct informational or collaborative approach.

Conversation Approach	Conversation Opening Question Stems
<p>Direct Control (Glickman)</p> <p>Very clear data and presentation of what to do. Highly instructional and direct. This type of conversation is to deliver a message. This is not used in most conversations, but is necessary at times.</p>	<ul style="list-style-type: none"> ● <i>Based on the analysis of the data, there are some clear patterns in the classroom that require immediate attention if we are to support you to teach this year. In terms of classroom management, I want you to try _____</i> ● <i>Based on the analysis of the evidence, I am concerned about _____, and I need to sit with you and plan a lesson so that we can perhaps assist you more in _____.</i> ● <i>I observed that 15 of 20 students were off task each time I did the task data collection in the 45 minute period. Therefore, I want to work with you on engagement strategies and checking or understanding.</i> ●
<p>Directive Informational (Glickman)</p> <p>Instructional (Bloom)</p> <p>When choosing an instructional approach, Bloom says it is a good idea to get permission. It is often useful for new teachers, who often do not have a way to think through the options. This is often an effective approach with novice teachers or veteran teachers who need particular attention</p>	<p>To start any conversation of this type, use some version of this start:</p> <p><i>"I observed _____. I would like to give you some options for what I think might be helpful. Is that all right?"</i></p> <ul style="list-style-type: none"> ● <i>Three students on the left back and two students on the right rear were talking or off task the entire period. These are three options I can think of to try: (1)____ (2)____ (3) ____ Do you have another option you think might work better</i> ● <i>I observed that you primarily used hand-raising to call on students. You asked __ questions; typically in those questions you did not use think time, and you called on __ students. One way I think we agreed to in our professional learning was to use equity sticks. In this particular lesson, when could you have used those?</i> ● <i>What are some other ways you know to call on students so we have more equitable access to the classroom discourse?</i>

Conversation Approach	Conversation Opening Question Stems
<p>Collaborative (Glickman) Aka Facilitative (Bloom) Cognitive Coaching (Garmstrom et al.)</p> <p>Teacher who is knowledgeable about practice and for whom the evidence will be supportive.</p>	<p>The purpose of this CONVERSATION is to get the teacher to talk about practice.</p> <ul style="list-style-type: none"> ● <i>"I observed that _____ occurred. Can we talk about that or does something else in the data stand out as important to talk about?"</i> ● <i>The data indicate that _____. Do they correspond to your perception of _____?"</i> ● <i>What was happening when _____?"</i> ● <i>I'm curious about this part of the observation (state factual evidence). What were you thinking about when you _____?"</i> ● <i>I noticed these two things about student responses: _____ and _____. What can you tell me about those students and their learning?"</i> ● <i>I noticed that you spent most of your time with ____ and _____. I am wondering about that choice...was it purposeful or did it just happen?"</i>
<p>Nondirective (Glickman) Collaborative (Bloom) Cognitive coaching Works at all times toward the teacher's self-plan for improvement and relies on teacher input to have a conference.</p>	<p>The most important part of this type of conversation is not in the opening question, but in the paraphrasing and mediational questioning that occurs in the conversation to help the teacher develop a self-plan for improvement, relying almost totally on the teacher as lead. This is usually done with sophisticated, strong and often veteran teachers who know teaching practice and language.</p> <p>This relies on listening empathetically and effectively and requires an observer/evaluator who has acquired strength in tools of constructivist listening.</p>

FACILITATIONAL OR INSTRUCTIONAL QUESTIONS

See [Coaching for Equity](#) at the end of this document.

Blended coaching requires a dance between three positions to take as a coach:

Consultative, Collaborative and Transformational using two types of coaching questions: **instructional and facilitative**.

You will need to make a decision about whether the conference needs to be instructional (probably Glickman direct control or direct informational) or facilitative (collaborative or nondirective). In all cases, we do hope that the teachers can come to their own ideas and decisions about changing practice – mainly by the use of facilitative coaching moves of **paraphrasing, clarifying, and mediational questions + summarizing statements**. In general, new teachers need more instruction, but even then, get them to talk about practice. Even when they ask (or nearly plead), be very careful about lots of advice and direction. Remember that, even when something in the classroom has made you upset –most of the time, the teacher is alone in the classroom and has to solve his/her own problems. Thus, it is important, if possible, that the teacher solve his or her own problems by thinking through them with you. If this requires more instruction on your part because the teacher does not really know what to do, get permission to be instructional. As much as possible navigate the conversation back to facilitating the thinking of the teacher.

Instructional to Facilitative Coaching

Bloom, G., Castagna, C.L., Moir, E., & Warren, B. (2005). *Blended coaching: Skills and strategies to support principal development*. Corwin Press

Although the book is useful for those coaching principals, the coaching philosophy applies to coaching any adult.

The image is a mobius strip chosen to exemplify the ways that effective conversations rely on the coach's ability to move easily among the approaches to support the person who is coached. At times, like Glickman, the principal has to be more instructional and less facilitative (or using cognitive coaching). The goal is always to ensure the coachee starts to think for herself or himself about how to transform his or her practice.



Adapted from *Blended Coaching*

COACHING FOR EQUITY USING PARAPHRASING IN MULTIPLE WAYS

Adapted from Lipton, Wellman & Humbard, 2003 and Principal Leadership Institute, UC Berkeley

CRITERIA FOR STRONG PARAPHRASING

Captures the essence of the message from coachee

Reflects the essence in voice tone and gestures

Names the speaker's content, emotions, and frames a logical level for addressing the content

Reflects the speaker's thinking back to the speaker for further consideration

Is shorter, but uses some of the language of the original statement

Seeks understanding, clarity and alignment

TYPES OF PARAPHRASING				
<p style="text-align: center;">ACKNOWLEDGING & CLARIFYING</p> <p style="text-align: center;">By restating the essence of a statement, the coach paraphrases in order to identify and calibrate content and emotions.</p>	<p style="text-align: center;">SUMMARIZING & ORGANIZING</p> <p style="text-align: center;">By summarizing and organizing, the coach paraphrases the coachee's responses to reshape thinking and separate jumbled issues.</p>	<p style="text-align: center;">SHIFTING LEVEL OF ABSTRACTION</p> <p style="text-align: center;">By shifting the level of abstraction "up", the coach illuminates other ideas and supports the coachee to think at a deeper level. When shifting "down", the coach supports coachee to be more precise.</p>		
COACHING QUESTION STEMS				
<ul style="list-style-type: none"> • So, you're feeling _____. • You seem to be noticing that _____. • In other words, you are saying that _____. • Hmm, you're suggesting that _____. 	<ul style="list-style-type: none"> • There seem to be two issues here: _____ and _____ • On the one hand, it seems you are saying that _____. On the other hand, there might be _____ to think about. • For you then, several themes are emerging: _____, _____ and _____ • It seems you are considering this sequence or hierarchy: _____ 	<p style="text-align: center;">So, a(n) _____ for you might be _____.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><i>Shifting up</i></p> <ul style="list-style-type: none"> category belief assumption goal intention </td> <td style="width: 50%; vertical-align: top;"> <p><i>Shifting down</i></p> <ul style="list-style-type: none"> example non-example strategy choice action option </td> </tr> </table>	<p><i>Shifting up</i></p> <ul style="list-style-type: none"> category belief assumption goal intention 	<p><i>Shifting down</i></p> <ul style="list-style-type: none"> example non-example strategy choice action option
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