

EXPERIENCES THAT PREPARE EFFECTIVE PRINCIPALS

ULEAD Director's Note: Successful principals require access to and support from other effective leaders, along with experienced-based skills that motivate, empower, and model effective instruction. The variety of examples in this brief are intended to support thoughtful reflection and implementation of evidence-based practices that lead to improved student learning. While specific programs are not endorsed by ULEAD, common findings should be noted and adopted within the appropriate context.

Introduction

Effective principals are essential to student and school success.¹ However, districts often struggle to attract and support quality school leaders.² Furthermore, principals require experiences and support to develop their school leadership skills.³ Many states and districts are working to implement principal preparation experiences and programs, both in school district and higher education settings, to prepare effective school leaders.⁴ To support these efforts, ULEAD and Hanover published this brief to help inform leadership development in the state.

Recommendations

When looking to increase the pool of qualified principals, ULEAD and Hanover recommend:

-  **Providing well-defined leadership opportunities for teachers** that allow teachers to develop leadership skills in addition to their roles as classroom teachers;
-  **Developing a rigorous recruitment and selection process for principal preparation programs** that seeks those with prior leadership roles and a commitment to leadership service in the district as well as an understanding of the community they will lead.
-  **Increasing collaboration between school districts and higher education institutions** to coordinate internship programs and ensure that principal preparation programs provide the most relevant leadership competencies;



Gathering feedback from principals on leadership and training experiences that have contributed to their success.

Key Findings



Highly effective principals embody the qualities of transformational leadership to shift the people and culture of a school community. Transformational and highly effective leaders can inspire, motivate, and enable school communities to achieve a common positive vision for student success. Research on effective school turnaround efforts also highlights the importance of strong leadership in shaping and sustaining a positive vision for change. Effective school turnaround leaders also successfully identify, address, and overcome challenges as they occur.



Principal preparation programs often look for candidates with teaching experience and demonstrated classroom success, a commitment to leading a school, and prior leadership experience. Research on effective principal preparation programs highlights the importance of rigorous, yet flexible, selection criteria to identify candidates most likely to succeed as school leaders. In addition to prior leadership experiences and qualifications, some research also points to the importance of recruiting candidates that reflect the specific needs of the school or district community.



Districts can develop opportunities for teachers to build leadership skills and experiences prior to a formal principal preparation program. To create the infrastructure for teacher leadership opportunities, districts can define specific teacher leadership roles and associated responsibilities and expectations. Leadership experiences may include facilitating professional learning, developing and reviewing curriculum materials, sharing and modeling best practices, and instructional coaching.



Principal preparation programs should offer candidates high-quality fieldwork experiences and mentorship opportunities.
→ **High-quality principal fieldwork (i.e., internships)** exposes principals to a wide set of responsibilities and allows principals to practice

school leadership with increased reflection, guidance, and accountability.

→ **Mentoring during the fieldwork experience** and into the first year or two of principalship provides principal candidates with support, feedback, and guided practice and ensures the fieldwork meets the candidate’s learning needs.

Characteristics and Competencies of Effective Principals

Transformational leadership is a common quality of highly effective principals who improve student achievement.⁵ At the core, transformational leaders have the skills and abilities necessary to transform “the people and culture within an organization.”⁶ Figure A, below, outlines transformational leadership competencies commonly identified in highly effective principals. These competencies highlight the importance of creating a positive culture to develop and support school improvement initiatives.⁷

Transformational leadership competencies can be taught and learned over time in order to support school leaders in making positive changes.⁸ The Darden/Curry Partnership for Leaders in Education at the University of Virginia describes “transformational leadership[as] a primary lever and a necessary component of any lasting K12 system or school change.”⁹

Figure A: Transformational Leadership Competencies



Similarly, research by the Darden/Curry Partnership for Leaders in Education and the Center on School Turnaround at WestEd echo these competencies, noting that critical leadership focus areas for successful school turnaround include:¹⁰

- 1 Continually Conveying an Invigorating Vision
- 2 Motivating Teachers to Maintain Commitment to Transforming the School
- 3 Leading Instruction for Ongoing Teacher Growth
- 4 Insisting on a High-Quality Learning Experience for All Students, Regardless of Their Background
- 5 Garnering and Maintaining Support from Partners

Research on school turnaround also highlights the importance of leadership in shaping and sustaining a positive vision for change. Principals who effectively and rapidly improve student achievement in turnaround schools share additional characteristics and competencies related to how they identify, address, and tackle challenges, as described in Figure B, below.¹¹

Figure B: Competencies of Effective School Turnaround Leaders

COMPETENCY	DESCRIPTION
Initiates and persists	The principal focuses on sustainable results through persevering and addressing challenges in the school, and developing appropriate strategies to address problems of practice.
Inspires and motivates others	The principal utilizes works with a group of adults to leverage their input, to develop actionable goals, and to ultimately realize change in the school.
Elicits intended response	The principal takes actions for the purpose of affecting the perceptions, thinking, and actions of others.
Builds capacity through accountability and support	The principal is mindful of school performance needs and holds others accountable for high standards.
Commits to students	The principal demonstrates a commitment to students as evidenced by a belief in their own capability, and the courage to take a stand on behalf of students.
Crystallizes problems and creates solutions	The principal demonstrates the ability to see meaningful patterns among seemingly unrelated issues or ideas, leading to new ideas or fresh perspectives.
Uses inquiry to frame and solve problems	The principal demonstrates the ability to analyze issues and opportunities in a logical way, and to recognize cause and effect.

What School Districts and Principal Preparation Programs Look for in Principal Candidates

Principal preparation programs should recruit and admit educators with teaching experience or demonstrated classroom experience, a desire for and commitment to school leadership, and prior leadership experience. Research on effective principal preparation programs highlights the importance of rigorous, yet flexible, selection criteria for successful outcomes.¹³ In a study commissioned by the Wallace Foundation, interviews with faculty and staff at principal preparation programs revealed that “programs focus on enrolling experienced teachers with strong teaching and leadership skills who are committed to educational change.”¹⁴

Programs also often look for candidates with experience working in high-needs settings or with special student populations such as English learners or students with disabilities, as well as leadership experience such as coaching other teachers or serving as an instructional specialist in a core subject area.¹⁵

The process of recruiting and selecting candidates should also consider the specific needs of the communities and school districts served. The Northeast Leadership Academy (NELA) at North Carolina State University engages in a rigorous selection process that focuses on recruiting educators who have worked with historically underserved and special student populations.¹⁶ Initially, the program only used grade point averages and recommendations from superintendents in the selection process. However, they quickly found that these criteria “did not support identification of the candidates with the most potential to be great school leaders.”¹⁷ Instead, the program reevaluated its selection process to focus on “identifying candidates who reflect the communities and populations they will lead.”¹⁸

While not a requirement for future success, prior leadership experience is often a preferred prerequisite. KIPP, a nationwide charter management organization, requires school leader candidates to have experience as teacher leaders and assistant principals. As shown in Figure D below, KIPP’s principal development model also requires school principals to have a deep commitment to

equity, justice, and diversity; experience teaching; great classroom or school results; a track record of driving academic results and culture through others; experience leading a team; and experience in a school-wide leadership role.¹⁹

Figure D: KIPP Leadership Pathway

SKILLS	TEACHER LEADER	ASSISTANT PRINCIPAL	SCHOOL LEADER
A deep commitment to equity, justice, and diversity	Required	Required	Required
Experience teaching	Required	Required	Required
Great classroom or school results	Required	Required	Required
A track record of driving academic results & culture through others		Required	Required
Experience leading a team	Preferred	Preferred	Required
Experience in a school-wide leadership role	Preferred	Preferred	Required
Experience as a school leader			Preferred

Source: KIPP²⁰

In addition to prior experiences and qualifications, principal preparation candidates should also be evaluated for leadership competencies and background knowledge. A study by the George W. Bush Institute and American Institutes for Research found that principal preparation programs often look for the particular competencies (Figure E, on the following page) when recruiting and screening candidates.²¹

Figure E: Candidate Competencies Desired by Principal Preparation Programs

- Emotional intelligence;
- A commitment to remain in the principal role for a longer period of time;
- An understanding of culture and organizational behavior;
- An understanding of systemic change and change processes;
- An understanding of the importance of quality management and the use of feedback loops with teachers;
- An understanding of how to make data-driven decisions; and
- Expert opinion.

Effective Experiences for Preparing School Principals

Literature on principal preparation generally divides important experiences for future principals into those that take place prior to a formal preparation program and those that take place during principal preparation programs.

Building Teacher Leadership Capabilities Prior to Principal Preparation Programs

Providing experiences that develop candidates' leadership skills while they are teachers or assistant principals is critical to preparing future principals. Indeed, "in the best approaches to principal preparation, potential leaders are identified early in their careers and given a range of opportunities to develop their leadership skills."²²

Additionally, research commissioned by the Wallace Foundation with districts implementing principal pipeline programs supports the importance of providing leadership opportunities to school staff who may become principal candidates in the future.²³ Districts in the Wallace Foundation's Principal Pipeline Initiative, which aims to improve principal quality and pipelines, define leadership pathways and leadership training curricula for aspiring leaders. For example, several districts extended and linked their principal preparation programs both downward to teacher leaders (e.g., instructional coaches and mentors) and upwards to prepare school leaders for central office leadership positions.²⁴

The Utah State Board of Education defines teacher leaders in the following way:

*"A teacher leader may support school-based professional learning; train, supervise, and mentor student teachers and new teachers; lead specific school improvement initiatives; and act as a liaison for community projects."*²⁵

Districts can create an infrastructure for leadership opportunities by defining specific teacher leadership roles and responsibilities. In defining teacher leadership roles, districts should create or clarify specific job descriptions and specify role compensation and incentives.²⁶ During the 2014-2015 school year, the Massachusetts Department of Elementary and Secondary Education (MDESE)

worked with ten districts in the state to facilitate teacher leadership. In sharing lessons learned and best practices from this work, MDESE emphasizes the importance of defining teacher leadership roles, noting that "clarity on the responsibilities can facilitate collective bargaining and increase the number of teachers interested in applying."²⁷ MDESE offers the following best practices for clarifying teacher leadership roles based on their work with districts:

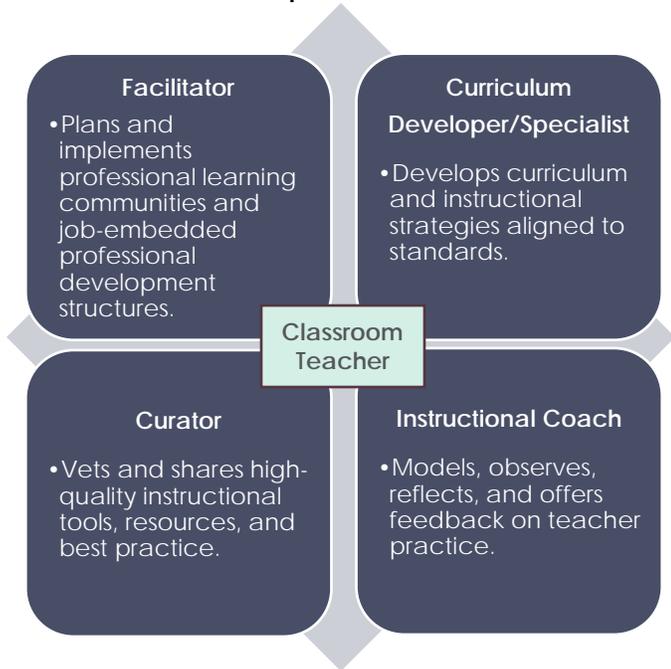
Figure F: Recommendations for Defining Teacher Leadership Roles

- **Make the role manageable.** It is important to ensure that teacher leaders can maintain their focus on their primary role of teaching, without feeling burnt out.
- **Balance the desire to standardize a role with the need to differentiate according to context.**
- **Be specific.** Teachers want to understand the full scope of the role before they apply. To the extent that you can, share when the work will happen and how much time you think it will take.
- **Include supports in the job description.** Applicants want to know how they will be supported. This could be by convening all the teachers in that role a few times, inviting teachers to attend a PD or training, or perhaps through interactions with a district-level or school-level administrator who can help them problem-solve throughout the year. Supports are just as important as compensation in helping the role feel attractive and doable.
- **Be clear on the terms of the position.** If there is a lot of interest in the position and/or if the focus of the role may shift over time, it might make sense to build in flexibility and limits. For example, clearly stating a role is for a "one year term with the opportunity to continue for a second year."

Source: Massachusetts Department of Elementary and Secondary Education²⁸

Figure G, below, presents a teacher leadership framework of the roles and responsibilities teacher leaders may hold in addition to their classroom teacher responsibilities.

Figure G: Sample Teacher Leadership Responsibilities



Source: WestEd²⁹

Similarly, the United Federation of Teachers outlines three types of teacher leaders – the Master Teacher, Model Teacher, and Peer Collaborative Teacher. The organization developed a description of each leadership role, as shown in Figure H, with distinct characteristics and responsibilities.

Figure H: Sample Teacher Leadership Roles

Master Teacher
Master Teachers are highly skilled educators with a passion and drive to improve the instructional quality of their schools by extending their impact as teachers. Master Teachers have a wealth of experience facilitating professional learning for colleagues and leading schoolwide initiatives. By working closely with school and/or district leadership, Master Teachers support the development of their peers by creating professional learning opportunities, leading teacher teams, and facilitating coaching conversations.

Model Teacher
Model teachers create a welcoming environment for teachers to reflect, grow and continuously explore innovative instructional strategies. Model Teachers demonstrate great instructional expertise, a dedication to professional growth and a strong understanding of their community's needs
Peer Collaborative Teacher
Peer Collaborative Teachers (PCTs) support their colleagues through focused coaching, intervisitations and designing meaningful opportunities for professional growth. In addition to the skills noted for Model Teachers, PCTs also have well-developed skills in data analysis as well as the ability to build consensus within teams.

Source: United Federation of Teachers³⁰

Districts can use the following discussion questions to guide the development of specific teacher leadership roles:³¹

Figure I: Discussion Questions for Designing Teacher Leadership Roles

<ul style="list-style-type: none"> • What are the assumptions we agree to about teacher leadership? • How do we define teacher leadership? • What are the purposes and desired outcomes for teacher leadership in our school or school system? • What is the form and function of our teacher leadership program? • Who are the most appropriate representatives to engage in developing or strengthening the existing teacher leadership efforts within the district? • What roles, formal and informal, do teacher leaders assume to contribute to the school and district goals? • What are the expectations of the teacher leaders? What is the scope of responsibility and expected impact of teacher leaders on students, colleagues, schools, and the school system? • How do we communicate the purpose, goals, and roles of teacher leaders to teachers and administrators in each school and in the district?

SPOTLIGHT: TEACHER LEADERSHIP IN UTAH

San Juan School District

San Juan School District (SJSJ) offers teachers leadership roles through their Quality Teacher Incentive Program (QTIP), which aims “To foster in all schools a collaborative faculty, rich in experience and pedagogy skills, and fully prepared to successfully deliver high-quality instruction in all classrooms.”³² QTIP teachers are lead teachers with demonstrated success in the classroom who serve as models for their peers and facilitate professional learning for other teachers.³³ According to the district, expectations for QTIP teachers include that they:³⁴

- Are classroom teachers who develop model lab classrooms
- Model instruction and invite teachers to observe
- Mentor and encourage teachers
- Support the principal by helping lead professional learning communities and school leadership teams
- Advocate for students and school reforms

Implementing teacher leadership opportunities requires a district culture and climate that promotes and supports teacher leadership and collaboration, and clearly defines district practices and procedures for enabling teacher leaders.³⁵ Learning Forward, an organization committed to educator professional development, recommends “assess[ing] current structures, procedures, and policies to identify those that support and impede teacher leadership.”³⁶ WestEd summarizes recommendations for building teacher leadership capacity, including those related to district culture and practices, based on research from successful districts (Figure J).

Figure J: Recommended Practices for Building Teacher Leadership Capacity

District culture and climate

- Principal buy-in for supporting teacher leaders as instructional leaders.
- Structures that enable teacher leaders to lead peers and collaborate with site leadership teams.
- A culture of collaborative, teacher-led, inquiry-based professional learning.
- A site-based climate that encourages non-evaluative, peer observation of classroom instruction (enabling demonstration classrooms or one-on-one coaching).
- Open communication between teacher leaders, site administrators, and district administrators.

A formalized set of district practices

- Define clear teacher-leader roles and responsibilities, which are articulated to on-site teachers and administrators.
- Develop a system for recruiting teacher leaders and participating teachers.
- Allocate funds to sustain teacher leadership work (e.g., compensation).
- Provide intentional professional learning for developing teacher leadership skills.
- Allocate and protect time for teacher-led activities (e.g., release time for planning, facilitating, and coaching; dedicated time for teacher collaboration).

Source: WestEd³⁷

Experiences that Prepare School Leaders in Principal Preparation Program

Research from the Wallace Foundation finds that effective principal preparation programs share the following four components:³⁸

- **Standards:** Clear, rigorous job requirements detailing what principals and assistant principals must know and do;
- **High-quality training:** Pre-service training programs that admit only high-potential candidates and then provide them with training suitable for district schools;
- **Selective hiring:** A set of procedures enabling districts to hire well-trained candidates as school leaders and match them to the right schools; and
- **Leader evaluation and on-the-job support:** Regular evaluation of principals by districts along with the provision of professional development that helps school leaders overcome weaknesses pinpointed in the assessments.

Principal preparation programs may provide participants with a variety of experiences that support these components. For example, KIPP offers multiple programs to develop and train school leaders, and while specific learning opportunities vary by leadership program, KIPP’s development opportunities include higher education coursework, leadership development sessions, residencies, coaching, relationship-building exercises, a capstone or impact analysis project, and individual development plans.³⁹

Principal preparation programs that produce effective principals typically include both **high-quality fieldwork** and **principal mentors**.

High-Quality Fieldwork Experiences

Research on effective principal preparation programs shows that high-quality fieldwork experiences, such as residencies and internships in school settings, are critical to preparing successful principals.⁴⁰ A report by the George W. Bush Institute and American Institutes for Research on principal talent management finds that effective principals require “a meaningful residency experience that provides candidates with opportunities to apply knowledge and skills, observe current leaders modeling effective practice, and receive feedback on performance.”⁴¹ High-quality principal residencies and internships provide principal candidates with the practical knowledge, skills, and experiences to lead their schools.⁴²



Seminal research from the Wallace Foundation that compared principals from exemplary principal preparation programs to a comparison sample found that exemplary programs include “field-based internships that enable candidates to apply leadership knowledge and skills under the guidance of an expert practitioner” and that allow candidates to make connections between coursework and practice.⁴³

High-quality principal residencies or internships allow principals to experience and practice school leadership with increased reflection, guidance, and accountability.⁴⁴ According to a report on principal residencies by the American Institutes for Research and the NYC Leadership Academy, “the school-based residency is an opportunity for the principal candidate to take the theory and lessons learned in the classroom and put them in practice under the guidance of a mentor principal.”⁴⁵

Principal preparation fieldwork should also provide principal candidates with opportunities to learn and experience a wide set of responsibilities, including school improvement initiatives and experience interacting with and engaging stakeholders.⁴⁶ The Learning Policy Institute (LPI) explains that “field-based internships raise candidates’ awareness of the day-to-day complexities and demands of principals’ work, while also providing support from a mentor to help candidates connect theory from their coursework to practice.”⁴⁷ The LPI also recommends placing principal candidates in “the districts where they intend to work so that they become familiar with the context, resources, and challenges facing that district.”⁴⁸

Furthermore, the American Institutes for Research and NYC Leadership Academy recommend that principal residency programs include the following seven elements of effective residency programs.

Figure K: Essential Elements for Principal Residencies Candidate Learning Experiences

Element 1: Leadership Standards
Candidate performance expectations are written in behavioral terms to reflect candidates’ future job responsibilities and national standards. Leadership competencies anchor the entire preparation program, including candidate assignment or “match” to the residency school and mentor, curriculum, advancement, and evaluation.
Element 2: Differentiated Advancement
Each principal candidate has an individualized learning plan that reflects his/her strengths and weaknesses, as determined by selection and performance assessment information that moves candidates from guided learning and practice to more substantive leadership responsibilities. Principal candidate learning experiences scaffold skill and identity development, allowing candidates to learn content, experiment with leadership practice, and learn from mistakes. Formative assessment and feedback based on observation of candidate performance in the residency guide and accelerate candidate growth and development.
Element 3: Community Immersion
During the residency, principal candidates learn through immersion in two communities simultaneously. One is the professional community cultivated among the cohort of candidates in the preparation program. The second is the school community, where immersion includes participation in sustained, substantive, job-embedded learning experiences with opportunities for schoolwide decision making and assuming responsibility for authentic leadership work.
Element 4: Inquiry Learning
Individual candidate and candidate cohort learning is organized around cycles of inquiry, action, and reflection on the impact of leadership on students, staff, schools, and communities, with a primary focus on the schools in which immersion experiences occur.
Element 5: Regional Planning and Collaboration
Preparation program planning and collaboration occur through a formalized partnership among preparation program faculty and staff, district representatives, K-12 educators, principal associations, and other stakeholders. The success of this collaboration relies on clearly defined decision-making authority and considers how well the program meets regional leadership workforce talent needs. Curriculum, instruction, mentoring, and assessment decisions are informed by all partners, who share responsibility for ensuring candidates have rigorous, meaningful, and consistent learning experiences.

Element 6: Staff Selection and Development

All program faculty members, including mentor principals who support in-school residency experiences, demonstrate the requisite knowledge and skills to support candidates effectively. Intentional selection, training, and evaluation processes for facilitators, mentor principals, and coaches are in place and reflect the experience and skills needed to facilitate candidate learning, with an emphasis on participant assessment and feedback. Program leaders match principal candidates carefully with the mentors, coaches, and residency sites that are best positioned to meet their specific learning needs.

Element 7: Accountability

The program maintains systems and processes to collect, analyze, and maintain longitudinal data on candidate perspectives on program quality, candidate progress, and candidate performance and retention after graduation for the purposes of monitoring and improving program coherence with standards, consistency across implementation contexts over time, and continuous program improvement.

Source: *The American Institutes for Research and NYC Leadership Academy*⁴⁹

Mentorship Opportunities

Principal preparation programs also rely on mentoring and coaching to develop candidates' leadership skills.⁵⁰ Mentoring provides principal candidates with support, feedback, and guided practice during their residency thus allowing candidates to improve their practices.⁵¹ Mentors are responsible for ensuring that the residency experience meets the candidate's learning needs, supporting and guiding the candidate through a wide range of experiences, conducting observations and providing feedback, and modeling and role-playing important practices and conversations.⁵²

While mentoring is critical during a candidate's fieldwork, some programs continue mentoring relationships into the candidate's first year or two as a novice principal.⁵³ Mentoring should also be personalized to the specific learning needs of the candidate.⁵⁴

The American Institutes for Research and NYC Leadership Academy recommend that residency programs include both a mentor principal who works directly with the candidate during their residency as well as a coach who regularly visits the school to support both the candidate and the mentor principal and to ensure the "residency experience offers an appropriate level of rigor to fully develop the candidate's skills."⁵⁵



The NELA program at North Carolina State University pairs principal candidates with both a school-based principal mentor and an executive coach such as a former superintendent or state education leader for the duration of their residency through their second year as a principal.⁵⁶ The program matches candidates with mentors and coaches "based on personality, background, and specific areas for growth."⁵⁷

Deloitte University

Deloitte opened Deloitte University (DU), The Leadership Center in October 2011 in Texas. The company provides leadership training opportunities for employees of every level at DU.⁵⁸ Programs at DU typically involve "complex, multi-day simulations built around small team interactions with a 1 to 5 facilitator-to-student ratio."⁵⁹ This model ensures that participants learn to handle real-life situations. Further, nearly all DU's programs are taught by senior employees to facilitate knowledge sharing.⁶⁰ Examples of DU's programs include:

- **Career Retreat:** Deloitte's Partners, Principals, and Managing Directors participate in a two-day program at DU. The program is designed to help these leaders focus their skills and their teams' strengths to enhance client engagement and satisfaction as well as company performance. During the program, participants engage "in interactive, multi-media exercises and pair with peers for activities, coaching, and feedback."⁶¹
- **TAP Into Your Leadership Potential:** This DU program is intended to "accelerate the transition of newly-promoted and newly-hired" managers, specialists, and high-ranking associates. The three and a half day program focuses on leadership, project management, relationship building, communication, and client engagement skills. In "Day in the Life" sessions, participants "work through a simulated client engagement with partner-level facilitators as coaches and Deloitte leaders playing the roles of staff, partners, and clients."⁶²
- **Early ID Program:** Deloitte recruits and provides training to high-potential undergraduate students. During the program, students "learn business and soft skills, and gain first-hand experience with Deloitte's commitment to community service through team-building and charity events."⁶³

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