

Principals as Instructional Leaders

A Review of the Literature

Research Unit, Research and Innovation for Student Learning

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OVERVIEW

In all dynamic organizations, leadership is intrinsic to the success of the overall system. In the education context, effective leadership is even more crucial as it can impact student success (Taylor-Backor & Gordon, 2015; Fullan, 2014; Rigby, 2014; Barber, Whelan, & Clark, 2010; Louis et al., 2010; Robinson, LLOYD, & Rowe, 2008; Leithwood, Louis, Anderson, & Wahlstrom, 2004).

In today's schools, principals face high expectations as they work to meet complex day-to-day demands under heavy workloads (Alberta Education, 2009). Yet, research and anecdotal evidence indicates that Canadian principals value the opportunity to act in the role of instructional leader (supporting and supervising teaching and instruction practices) and, if they had the choice, would choose to spend more time in that role.¹

Thus, the increased administrative demands of the principalship should not be a barrier to delegating some of those managerial tasks in order to free up time to develop classroom-related roles, such as what is known as instructional or pedagogical leadership. As Sullivan (2018) has written,

In a time of high-stakes accountability, the pressure has never been greater for principals to excel as instructional leaders. With the recently occurring changes and political debates in education, the role of administrators continues to be redefined. The work of the principal has shifted from discipline and administrivia to a concentration on learning... The link between school leadership and student success continues to be underestimated. Administrators are now increasingly viewed as academic coaches, rather than merely building managers. The role of "coach" and the practice of academic "coaching," no matter the subject area, have added a new dimension to the teacher-administrator relationship.²

As skilled leadership is invaluable to schools, how do districts identify, develop, and support principals in becoming instructional leaders? This literature review explores current research in the area and provides the necessary background for decision makers to address the following questions:

- 1) What is instructional leadership? What skills are entailed in being an instructional leader?
- 2) What may support the development of effective leaders? What supports are suggested for different stages of a principal's career?
- 3) What is the role of formal coaching and mentoring in the development of aspiring and new principals?

¹ Canadian Association of Principals & The Alberta Teachers' Association. (2014). The Future of the Principalship in Canada: a National Research Study. Retrieved from https://www.teachers.ab.ca/SiteCollectionDocuments/ATA/Publications/Research/The_Future_of_the_Principalship_in_Canada.pdf

² Sullivan, D. D. (2018). Elementary Teachers' Math Instructional Practices, Receptivity to Change, Instructional Leadership, and Academic Optimism. In S. M. Perry (Ed.), *Maximizing Social Science Research Through Publicly Accessible Data Sets* (pp. 197–228). Hershey, PA: IGI Global. [<https://drive.google.com/open?id=1BAfcM1OvBWC3nNM17ITZ6o9Y5xvGddfx>]
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INSTRUCTIONAL LEADERSHIP

Defining Instructional Leadership

Instructional leadership has risen to prominence as a guiding tenet of leadership in education over the previous twenty to thirty years (Salo, Nylund, & Stjernstrom, 2015; Gurley, Anast-May, O’Neal, Lee, & Shores, 2015; Valentine & Prater, 2011; Robinson, et al., 2008; Knuth & Banks, 2006). This shift has resulted in principals increasingly being referred to as “instructional leaders” in a variety of educational contexts and in large swaths of the research literature.

Furthermore, among Canadian principals, instructional leadership has been identified as the third most prominent change affecting the Canadian principal’s workplace (CAP-ATA, 2014). Rigby (2014) states that there are “multiple logics of instructional leadership” and that it is important for both practitioners and researchers to use frameworks “as a way to orient actions of reform, or support, and education” (612).³ Rigby points out that the “one prevailing logic [is] the generally accepted and practiced set of beliefs in the environment,” and that instructional leadership “is the primary role of the principal” (617).

But what defines a principal as an instructional leader? Instructional leadership can be considered one type of leadership and composed of a set of behaviors and characteristics. The *Principal Quality Practice Guideline: Promoting Successful School Leadership in Alberta* (PQPG) (2009) outlines seven “leadership dimensions” for the role of the principalship and defines instructional leadership as follows: “The principal ensures that all students have ongoing access to quality teaching and learning opportunities to meet the provincial goals of education.”⁴ The document defines principal quality practice as follows: “The principal is an accomplished teacher who practices quality leadership in the provision of opportunities for optimum learning and development of all students in the school” (Ibid., 4).

Current research presents different approaches to instructional leadership. There are important consistencies in the literature that help specify what instructional leadership might look like in practice.

From our review of the literature, some additional commonalities emerge in defining instructional leadership. An instructional leader:

³ Rigby, J. G. (2014). Three Logics of Instructional Leadership. *Educational Administration Quarterly*, 50(4), 610–644. [Access full text: https://drive.google.com/open?id=1mwwJSBQRiz5dFuQB0_dJ8omFtue8_7gL]

⁴ Alberta Education (2009). *Principal Quality Practice Guideline: Promoting successful school leadership in Alberta*, p.5. Retrieved from: <https://education.alberta.ca/media/1089182/principal-quality-practice-guideline-english-12feb09.pdf>

- Develops the school’s mission, shared vision for the school, and/or a direction for the school’s future (Gurley et al., 2015; Knuth & Banks, 2006; Naidoo & Petersen, 2006; Leithwood et al., 2004; Leithwood & Poplin, 1992).
- Prioritizes the improvement of instruction, including:
 - Monitoring, coaching, providing feedback, and/or supporting development of teaching practice (Schmidt, Young, Cassidy et al., 2017; Salo et al., 2015; Fullan, 2014; Muijs, 2011; Valentine & Prater, 2011; Knuth & Banks, 2006; Leithwood et al., 2004; National Staff Development Council, 2000; Leithwood & Poplin, 1992).
 - Leadership in the pedagogy and curriculum, and participation in professional learning communities (Sullivan, 2018; Salo et al., 2015; Fullan, 2014; Muijs, 2011; Holmstrom, 2010; Valentine & Prater, 2006)⁵
 - Focusing on the growth, improvement and impact on student learning as the basis for actions (Leithwood & Azah, 2017; Gurley et al., 2015; Fullan, 2014; Ontario Leadership Framework, 2013; Muijs, 2011; Robinson et al., 2008; Naidoo & Petersen, 2006; Knuth & Banks, 2006; Leithwood et al., 2004; National Council for Staff Development, 2000).

These elements are also reflected in Bedard and Mombourquette’s (2016) work in Alberta to provide a resource on professional practices for principals. These authors note that “the Alberta Education Act emphasizes that the first duty of a principal is to ‘provide instructional leadership in the school’”.⁶ From their research into understanding instructional leadership for Alberta’s education context, they highlight the following key areas:

- attention to teacher’s effect on student growth and development
- co-learning and promoting best instructional practices with teachers
- shaping a shared mission and vision for the school; and
- monitoring, modelling, and maintaining a dialogue with faculty about teaching and learning.

Of note, Bedard and Mombourquette propose that instructional leadership does not occur in a vacuum and that at the heart of the PQPG “lies the belief that student learning can increase through direct work with teachers and improvement of their practice.” The authors continue: “We find considerable evidence to support the idea that teachers and teaching in schools is key to school improvement endeavours” (Ibid., 17-18).

⁵ Holmstrom, A. (2010). District Finds the Right Equation to Improve Math Instruction. *Learning Forward*, 31(6), 58–62. Retrieved from <https://mishtadim.files.wordpress.com/2011/04/jsd-right-eqn-improve-math-instr.pdf>

⁶ Bedard, G. J., & Mombourquette, C. P. (2016). *Enacting Alberta School Leaders’ Professional Practice Competencies: a Toolkit*. FriesenPress, 15. <https://books.friesenpress.com/store/title/119734000025830513/George-J.-Bedard-Enacting-Alberta-School-Leaders%27-Professional-Practice-Competencies>

They contend that “there is little direct or indirect evidence to support the notion that evaluation of teachers by the principal leads to school improvement and in turn better student learning” (18). Rather, the authors suggest in their reading of the PQPG that “core to the principal’s development and facilitation of leadership in others is the active involvement of school stakeholders in ethical decisions made for the school and the processes through which those decisions are arrived at” (19-20).

Yet, it is important to note that an effective leader in education may incorporate elements from other leadership styles (e.g. transformational leadership, distributed leadership) and must still fulfill their obligations as a manager of the school. The evolving definition of instructional leadership in recent research has moved to incorporate more collaborative approaches and openness, as characterized by transformational and distributed leadership (Salo, Nyland, & Stjernstrom, 2015; Robinson et al., 2008). Further, the managerial position of the principal in the day-to-day operations of a school and effective organization is vital and should be considered within comprehensive principal leadership (Fullan, 2014; Valentine & Prater, 2011). As Leithwood, Louis, Anderson, and Wahlstrom (2004) write, “Sometimes these [leadership] adjectives have real meaning, but sometimes they mask the more important underlying themes common to successful leadership, regardless of the style being advocated” (p. 6).

Empirical research also suggests that ambiguity in defining the principal’s role may contribute to the rise in tensions between leadership and managerial responsibilities (CAP-ATA, 2014). Yet, in her case study on the implementation of new instructional strategies in a Washington District for teaching math, Holmstrom (2010) writes that there can be a benefit for principals to focus on learning: “administrators are better supporters of math teachers because they engaged in professional learning studying math as well.” She continues:

principals promoted learning by participating in lesson studies with professional learning communities, facilitating preplanning and debriefing sessions around focused topics for improving instruction (62).

In assembling leadership profiles and frameworks, specific skills and roles can be identified and provide more clarity on the leadership practices required of the principal.

We offer a working definition of instructional leadership. This definition takes a cue from Fullan’s work in *The Principal* (2014), who contends that:

It is understandable that some people misinterpret the emphasis on the instructional leadership of the principal. They mistakenly assume that instructional leadership means that principals must spend much of their time in classrooms working *directly* with individual teachers. The findings about effectiveness that I have reviewed in this chapter are not telling us that the best principals spend several days a week in classrooms, but that they do enough of it regularly to maintain and develop their instructional expertise. It is not that they affect very many teachers one by one, but that they

work with other leaders in the school and together affect teachers more in groups than they do individually.⁷

As such, Fullan clarifies the discussion somewhat by offering the following definition of a “leading learner”: “if principals directly influence how teachers can learn together,” he writes, “they will maximize their impact on student learning” (65-6).

In conclusion, we propose a working definition of instructional leadership: **Instructional leadership involves principals becoming leading learners who successfully nurture a learning community that supports and improves student achievement.**

Skills of Instructional Leaders

We now turn to the research on the skills and competencies needed to exercise effective leadership practices in the principalship. Reviewing current leadership profiles and leadership frameworks not only helps to further define instructional leadership, but it also identifies skills to measure, assess, or develop current principals’ leadership practices.

Throughout the literature, researchers employ varying terminology in building the profiles of effective leaders, such as skills, competencies, descriptors, dimensions, and capabilities. We will summarize the concepts as though they are synonymous terms, in that they all present observable, assessable, and even potentially measurable qualities of a school leader. These concepts are akin to what Hattie in his influential work calls “visible learning;” that is, “the attributes of schooling that truly make a difference to student learning - the ‘processing’ attributes that make learning visible, such that we might say that the school has ‘visible learning inside’”.⁸

In describing instructional leadership specifically, the PQPG states that the principal:

- a) demonstrates a sound understanding of current pedagogy and curriculum
- b) implements strategies for addressing standards of student achievement
- c) ensures that student assessment and evaluation practices throughout the school are fair, appropriate and balanced
- d) implements effective supervision and evaluation to ensure that all teachers consistently meet the Alberta Teaching Quality Standard
- e) ensures that appropriate pedagogy is utilized in response to various dimensions of student diversity
- f) ensures that students have access to appropriate programming based on their individual learning needs

⁷ Fullan, M. (2014). Chapter 3: The First Key - Leading Learning. In *The Principal: Three Keys to Maximizing Impact* (pp. 55–90). San Francisco, CA: Jossey-Bass.

⁸ Hattie, J. (2012). *Visible Learning for Teachers: Maximizing Impact on Learning*. New York: Routledge, 1.

- g) recognizes the potential of new and emerging technologies, and enables their meaningful integration in support of teaching and learning
- h) ensures that teachers and other staff communicate and collaborate with parents and community agencies, where appropriate, to support student learning
- i) supports the use of community resources to enhance student learning (p. 5).

These descriptors fit the understanding of instructional leadership established in the literature. The focus of these descriptors is on the improvement of student learning and instruction.

Composite lists of school leadership skills/practices for principals

We can now begin to assemble a set of specific skills and abilities necessary for effective instructional leadership. Comprehensive research reviews have created composite lists of school leadership skills/practices for principals that are based in leadership best practices or have demonstrated influence on student outcomes in empirical studies. In their 2010 report about school leadership, Barber et al. (2010) reviewed international findings from the current literature, survey data, and various 'in-country' inspections and assessments and identified a set of practices and personal attributes that effective leaders share.⁹ These practices and personal attributes are as follows:

Practices

- Building a shared vision of purpose
- Setting high expectations for performance
- Role modeling behaviours and practices
- Designing and managing the teaching and learning program
- Establishing effective teams within the school staff, and distributing leadership among the school staff
- Understanding and developing people
- Protecting teachers from issues that would distract from their work
- Establishing school routines and norms for behaviours
- Monitoring performance
- Connecting schools to parents and the community
- Recognizing and rewarding achievement

Personal attributes

- Focused on student achievement; puts children ahead of personal or political interests
- Resilient and persistent in goals, but adaptable to context and people
- Willing to develop a deep understanding of people and context
- Willing to take risks and challenge accepted beliefs and behaviours
- Self-aware and able to learn

⁹ Barber, M., Whelan, F., & Clark, M. (2010). Capturing the leadership premium: How the world's top school systems are building leadership capacity for the future. Retrieved from

<http://portales.mineduc.cl/usuarios/fde/doc/201202221325220.Informe%20Mckinsey.pdf>

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- Optimistic and enthusiastic (Ibid., p. 5).

In addition to the comprehensive research review, McKinsey & Company sought responses from a group of 1,850 school and district leaders on the topic of leadership. In the survey, respondents (including participants from Alberta) selected what they believed to be the three most important skills required of a good leader. Notably, all principals and district leaders surveyed selected “ability to coach others and help them develop” among their top three most important leadership skills. This skill is a good indication of instructional leadership because teacher development is the most impactful practice on student learning outcomes (Barber et al., 2010). The study found that principals from high performing schools (ie. schools that capture good practice and “the leadership premium” (p.28)) dedicate more of their work hours towards teacher development than a comparison group of randomly selected principals (p.7). The authors contend that “the evidence is consistent across a large number of countries and contexts, and demonstrates that ‘school leadership is second only to classroom teaching as an influence on pupil learning’” (p.5).

Furthermore, supporting the focus on instructional leadership over other educational leadership styles, Robinson, Lloyd, and Rowe (2008) conducted a meta-analysis on the impact of instructional leadership. Compared to transformational leadership, the authors conclude that instructional leadership is more impactful (by three to four times) on student outcomes than transformational leadership (Ibid.). This difference in impact is explained by the researchers in that transformational leadership is more focused on staff relationships whereas instructional leadership guides educational work. These authors were also able to identify five common leadership practices or “dimensions” that may influence student achievement based on the school leader’s ability to carry out these practices. The five dimensions include:

1. Establishing goals and expectations - goals that have an emphasis on student learning
2. Resourcing strategically - securing resources that serve instructional purposes
3. Planning, coordinating, and evaluating teaching and the curriculum - oversee the coordination of the instructional program and engage with teachers on instructional matters
4. Promoting and participating in teacher learning and development - principal participates in learning as leader and/or learner with teachers
5. Ensuring an orderly and supportive environment - establish a safe environment for staff and students including supporting teachers by managing conflict and alleviating undue pressures.

These authors point to the leadership dimension of “promoting and participating in teacher learning and development” to have the strongest association with student outcomes (Ibid.). This dimension is comparable to the strength of the influence related to the “ability to coach others and help them develop” found in Barber et al. (2010).

From these results we can see that similarities emerge, not only between the studies but also when compared to the Alberta Education PQPG and Edmonton Public Schools leadership development framework.

Commonalities point to a coherency in the understanding of effective instructional leadership practices despite any discrepancies in the definition of instructional leadership.

Communication/people skills, staff development or coaching, and strategic goal setting were common themes in all four sets of leadership skills presented. These are foundational to many styles of leadership, however, through the lens of instructional leadership these skills work specifically towards improving student outcomes.

Staff development led by the principals

Research also suggests that staff development led by principals has the strongest impact on student outcomes. The underlying motivation to improve student learning and instruction is ubiquitous across all the skills sets presented. This is unsurprising as the improvement of student learning is at the heart of instructional leadership. Put into practice, defined and assessable leadership skills for principals can provide clarity on the expectations for their role as instructional leaders.

CASE STUDIES

The following two case studies provide examples of robust, evidence-based leadership frameworks that demonstrate the importance of outlining desirable instructional leadership skills for principals. The examples encapsulate the skills and attributes discussed in each framework while the scope of each full document expands into leadership development and principal qualifications.

By clearly identifying the leadership skills and attributes of principals, the foundation is laid for leadership development programs discussed in Section Two.

Ontario: Ontario Leadership Framework

In considering the specific context of principals as instructional leaders and the skills they require, The Ontario Leadership Framework (OLF) (2013) provides evidence based examples.¹⁰ The Ontario Leadership Framework has established five “Core Leadership Capacities” for school leaders as well as “Personal Leadership Resources” to be developed over the stages of their leadership careers. The five Core Leadership Capacities include:

1. *Setting goals* - strategic goals that are focused on improved teaching and learning

¹⁰ The Institute of Education Leadership. (2013). The Ontario Leadership Framework: A School and System Leader’s Guide to Putting Ontario’s Leadership Framework into Action. Retrieved from https://www.education-leadership-ontario.ca/application/files/8814/9452/4183/Ontario_Leadership_Framework_OLF.pdf

2. *Aligning resources with priorities* - ensuring all categories of resources are aligned with the priorities of student learning and wellbeing
3. *Promoting collaborative learning cultures* - schools, community, and district learn from each other for improved teaching practice and student achievement
4. *Using data* - gathering and analyzing relevant data to inform actions in teaching and learning
5. *Engaging in courageous conversations* - challenge current practices, foster innovation, provide feedback, and act on feedback received.

These capacities are intended to operate across multiple domains of a principal’s role. In addition, select Personal Leadership Resources have been identified by OLF authors in the research as supporting leaders’ effectiveness:

- Cognitive resources
 - Problem solving expertise
 - Knowledge about school and classroom conditions with direct effects on student learning
 - Systems thinking
- Social resources
 - The ability to:
 - Perceive emotions
 - Manage emotions
 - Act in emotionally appropriate ways
- Psychological resources
 - Optimism
 - Self-efficacy
 - Resilience
 - Proactivity (p. 22).

According to the Ontario Leadership Framework, the purpose of explicitly outlining instructional leadership in this way is ***to provide a shared vision of leadership for schools across the province, identify practices and traits of effective leaders, guide professional learning, and assist in the selection and development of effective leaders.*** The framework of skills and attributes forms the roadmap to develop leaders and improve leadership practices. Without outlining the details of leadership, achieving these goals would not be possible.

Victoria, AU: Developmental Learning Framework for School Leaders

Victoria, Australia’s Developmental Learning Framework for School Leaders (2007) outlines the profile of a school leader including areas of practice (or “domain”) and the capabilities (or “skills”) needed in order to

practice effective leadership.¹¹ In the complete Developmental Learning Framework, each domain also includes a descriptive of range of levels, from novice to expert leaders, and school leaders can self-reflect or evaluate their current ability and areas for improvement.

- *Technical Leadership domain*: relates to managerial and administrative responsibilities
 - Capabilities:
 - Thinks and plans strategically
 - Aligns resources with desired outcomes
 - Holds self and others to account
- *Human Leadership domain* - relates to fostering a safe, inclusive learning environment as well as respectful relationships with faculty and staff
 - Capabilities:
 - Advocates for all students
 - Develops relationships
 - Develops individual and collective capacity
- *Educational Leadership domain* - relates to improving the school through an understanding of the learning process and enhancing teaching and learning for every classroom
 - Capabilities:
 - Shapes pedagogy
 - Focus on achievement
 - Promotes inquiry and reflection
- *Symbolic Leadership domain* - relates to modeling values and behaviors important to the direction of the school such as professional learning
 - Capabilities:
 - Develops and manages self
 - Aligns actions with shared values
 - Creates and shares knowledge
- *Cultural Leadership domain* - relates to future thinking and a shared purpose within the school's culture
 - Capabilities:
 - Shapes future
 - Develops a unique school culture
 - Sustains partnerships and networks

The purpose of the Framework is to identify strengths and areas of improvement for school leaders, enable reflection on leadership practices, and provide a shared understanding of leadership in order to enrich conversations between staff, principals, and system leaders. From the framework's introduction, it "has been

¹¹ Department of Education, Victoria. (2007). The Developmental Learning Framework for School Leaders. Retrieved from: <http://www.education.vic.gov.au/Documents/school/principals/profdev/developmentallearn.pdf>
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developed in recognition of the need to be explicit about the leadership capabilities that teachers and school leaders require to create and sustain effective learning environments” (p. 1).

Defining instructional leadership and identifying the skills and attributes necessary to make it effective is the first step towards developing and improving instructional leaders for schools.

As the above cases demonstrate, the explicit definition of skills and attributes provide the roadmap for developing the learning framework and evaluating school leaders. **A shared understanding of the skills required leads to meaningful professional learning and a clear pathway for aspiring leaders to become high performing school leaders.**

DEVELOPING EFFECTIVE LEADERS

Leadership Development Programs

Leadership development programs help to prepare pre-service principals but they can also continue leadership learning for experienced principals. Such programs are commonly offered through post-secondary institutions, housed within a district, or offered by third-party institutions. While the demand exists for more instructional leadership development among Canadian principals, recently surveyed principals were uncertain as to what format and content would be most beneficial (CAP-ATA, 2014). This may be because of an absence of an explicit and shared understanding of instructional leadership and its necessary skills as discussed in Section One, but there are of course other possible reasons for such uncertainty. Our effort in this section is to discuss current research that has also identified key practices for programs and can provide lessons for other districts investigating effective and intentional leadership development programs.

The current state of leadership development programs for principals faces concerns of being outdated in the knowledge area, failing to link theory and practice, lacking in field-based learning, not aligning with school/district mission, and/or inconsistent use of learning technologies in instruction.¹² Without proper leadership preparation and development, it is unlikely other initiatives and policies intended for school improvement will be effective. Louis et al. (2010) note: “To date we have not found a single case of a school improving its student achievement in the absence of talented leadership”.¹³ Recommendations from the literature to correct these issues and improve leadership development programs converge on a few key practices, which are discussed below.

Adult learning principles

Effective leadership program delivery, whether it is a professional learning workshop or a longer form, is designed to follow principles of adult learning (Barber, et al., 2010; Darling-Hammond et al., 2007; Davis, Darling-Hammond, LaPointe, & Meyerson, 2005). Effective program practices used to promote adult learning include a clear, standards/research-based curriculum (Darling-Hammond et al., 2007; Davis et al., 2005), collaborative or cohort learning (Taylor-Backor & Gordon, 2015; Barber, et al., 2010; Darling-Hammond et al., 2007; Davis et al., 2005); and field-based work experience (Taylor-Backor & Gordon, 2015; Davis & Darling-Hammond, 2012; Barber et al., 2010; Darling-Hammond et al., 2007; Davis et al., 2005). Taking into consideration the best practices for adult learning, the delivery of a leadership development program can be more relevant, meaningful, and engaging for the adult professionals participating.

¹² Darling-Hammond, L., LaPointe, M., Meyerson, D., Orr, M.T., & Cohen, C. (2007). *Preparing School Leaders for a Changing World: Lessons from Exemplary Leadership Development Programs*. Stanford, CA: Stanford University, Stanford Educational Leadership Institute. Retrieved from: <http://www.wallacefoundation.org/knowledge-center/Documents/Preparing-School-Leaders-Executive-Summary.pdf>

¹³ Louis, K.S., Whalstrom, K.L, Michlin, M., Gordon, M., Thomas, E., Leithwood, K., Anderson, S.E., Mascall, B., Strauss, T., & Moore, S. (2010). Learning from leadership: Investigating the links to improved student learning. The Wallace Foundation, 9. Retrieved from: <http://www.wallacefoundation.org/knowledge-center/Documents/Investigating-the-Links-to-Improved-Student-Learning.pdf>

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Field Experience

Field-based work experience is included as an important aspect of adult learning. Research shows that field experiences are especially important to principal development. As The National Staff Development Council (US) (2000) recommend, job-embedded training allows principals to focus on the “real work” and day-to-day problems they face.¹⁴ Taylor-Backor and Gordon (2015) interviewed principals and suggested multiple field work options would be beneficial to their development: classroom observations, hands-on integration of theory and practice, job shadowing, and practice in the typical instructional leadership duties of principalship.¹⁵

The desire for more field work is well established, as many effective leadership development programs include this method of instruction (Taylor-Backor & Gordon, 2015; Davis & Darling-Hammond, 2012; Barber et al., 2010; Darling-Hammond et al., 2007; Davis et al., 2005).

Field work is sometimes delivered in the form of a formalized internship component. More than 90 percent of credential programs for principals currently require a field-based internship in some form (Murphy, 1992, in Davis et al., 2005). Internships entail opportunities to “learn on the ground leadership skills under the guidance of an expert principal” (Darling-Hammond et al., 2007, p. 64). Internship experiences should integrate theory and practice and should include problem-based learning (Darling-Hammond et al., 2007; Davis et al., 2005). Finally, field work is best when there is time for feedback and self reflection on practices (Taylor-Backor & Gordon, 2015; Darling-Hammond et al., 2007; Davis et al., 2005).

Selective recruitment

Many effective leadership development programs begin with the selection of exemplary candidates (Taylor-Backor & Gordon, 2015; Davis & Darling-Hammond, 2012; Darling-Hammond et al., 2007), prioritizing quality over quantity when introducing candidates into the leadership development pipeline. Identifying potential leaders and systematically developing their talent for leadership over time is a characteristic of high performing organizations, including schools.¹⁶

For exemplary leadership programs, selection of candidates is often done through a strong partnership between the district and the development program and/or post-secondary institution program.¹⁷ Multiple

¹⁴ National Staff Development Council (2000). Learning to lead, leading to learn: Improving school quality through principal professional development. <https://files.eric.ed.gov/fulltext/ED467224.pdf>

¹⁵ Taylor-Backor, K.T., & Gordon, S.P. (2015). Preparing principals as instructional leaders: Perceptions of university faculty, expert principals, and expert teacher leaders. *National Association of Secondary School Principals NASSP Bulletin*, 99(2), 105-126. <https://drive.google.com/open?id=1YSGONjgyxbBoPJuiqnmZaSMFLGvl-A->

¹⁶ Barber, M., Whelan, F., & Clark, M. (2010). Capturing the leadership premium: How the world’s top school systems are building leadership capacity for the future. <http://mckinseysociety.com/capturing-the-leadership-premium/>

¹⁷ Mitgang, L. (2012). The making of a principal: Five lessons in leadership training. *The Wallace Foundation*. Retrieved from: <http://www.wallacefoundation.org/knowledge-center/pages/the-making-of-the-principal-five-lessons-in-leadership-training.aspx>
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methods may be used in recruitment such as observation, interviews, written submissions, and group interview exercises (Taylor-Backor & Gordon, 2015). In addition to recruiting qualified candidates, more involvement in recruitment processes by leadership programs/post-secondary institutions has shown to substantially increase the diversity of ethnicity and gender among program graduates, when compared to the national average of leadership programs (Darling-Hammond et al., 2007). It should be noted that the level of recruitment evaluations and assessments carried out by exemplary programs is highly time consuming and costly (Mitgang, 2012). Such selective recruitment may also prove less viable if a district is experiencing a dearth in readily skilled potential leaders. Bear in mind, this recruitment process is for selection of candidates to the leadership development programs and separate from the application process for a principalship.

Evaluation

Two facets of evaluation are important to effective leadership programs: evaluation of the principal participants and ongoing evaluation of the program's effectiveness. Evaluation processes for school leaders can improve the overall school's performance (Barber et al., 2010). Variables used to assess a principal's progress, skills, or impact on schools are vast. Davis and Darling-Hammond (2012) recommend focusing assessment on the principal's influence on teacher feelings of motivation and capability, fostering of positive learning environments, professional collaboration, support of professional development, organization of resources for instruction, and garnering community/parent support.

Ongoing program evaluation is necessary for a leadership program to maintain relevance to principals' changing role (Mitgang, 2012). However, although effective programs have internal data and external research as evidence of their impact, "well-developed outcome-based measures of programs' and candidates' effects are not yet well-rooted even in these notable programs, much less the field as a whole" (Davis & Darling-Hammond, 2012, p. 42). Evaluating principals' skills and success after their participation in a leadership program is an indicator of a program's effectiveness, but assessing program graduates uses a great deal of resources that schools and districts may not have available. Despite challenges, programs should collect data, maintain records, and develop assessments to measure principal and program impact, so that pre-service principal training can continue to improve (Davis & Darling-Hammond, 2012).

Coaching and mentoring

Coaching and mentoring within an effective leadership program may stand alone, be part of the field work requirement, or be intended to extend beyond the program's completion (Davis & Darling-Hammond, 2012; Mitgang, 2012; Barber et al., 2010; Darling-Hammond et al., 2007; Davis et al., 2005). Formalized coaching and mentoring for leadership development and how it is implemented is a topic of interest for this review and will be addressed in detail in Section Three.

Career-Stage Leadership Support

Principal leadership skills are developed and refined over the course of a career. Most research, however, focuses on programs preparing aspiring or pre-service principals and this type of programming appears to be

far more prevalent. For example, Darling-Hammond et al. (2007) state, “few in-service programs for school leaders provide... ‘career staged’ professional development, providing a cumulative learning pathway from pre-service preparation throughout a principal’s career” (p.6). And, while effective leadership supports and development may be very similar across the career stages, there are some important distinctions to consider.

Aspiring principals

This group of principals is the most well researched in the field of leadership development and many of program recommendations in the literature apply to this group. Programs for aspiring principals have been criticized for focusing too much on managerial skills and didactic instruction rather than the complexities of principalship, instructional leadership, and affecting school change (Darling-Hammond et al., 2007; Mitgang, 2012). The recommendations described above help to address these critiques.

Of the key practices listed above, selective recruitment is especially relevant to aspiring principals. To be admitted to leadership training, it is recommended that selection be rigorous and candidates be screened for experience, skills, and dispositions needed for leadership (Mitgang, 2012). Thus, potential leaders or those who are interested in pursuing a principalship should be identified early so that they can gain progressively greater leadership experience (Barber et al., 2010). In some Alberta districts, potential leaders are assessed over the long term and advised through the principal application process (Barber et al., 2010).

Cohort learning is also a common feature of effective principal preparation programs; a group of learners moves through the program together and establishes a peer group in their profession (Davis & Darling-Hammond, 2012; Darling-Hammond et al., 2007; Davis et al., 2005). Field work, internships, and problem based learning are also critical features of effective preparation programs (Darling-Hammond et al., 2007). From these recommendations, it is easy to see how they overlap with the previously described beneficial features of principal leadership development programs.

New principals

New principals are principals that have completed their training or application process and are now in the early stages of their administration career. Intensive leadership support for new principals is very common among a wide range of school systems and leadership development programs. This leadership support often takes the form of mentorship, formal training sessions, and opportunities for networking with other principals (Barber et al., 2010). Effective programs and high performing schools often pair new principals with experienced principal mentors, and use this mentorship strategy as their main support for new principals (Davis & Darling-Hammond, 2012; Barber et al., 2010; Darling-Hammond et al., 2007; Davis et al., 2005). Mentorship programs, however, need to be carried out properly in order to be effective and not simply a “buddy-system” (Mitgang, 2012). According to Davis et al. (2005), well-structured mentoring includes a mutual commitment to work collaboratively, bridging the gap of independent problem solving and reaching higher levels of skills, and support and reinforce the mentee’s training and confidence. Coaching and mentoring will be revisited in more detail in Section Three.

In addition to mentoring, new principals benefit from tailored professional learning. Exemplary leadership development programs include professional development to reinforce training and instructional leadership topics (Darling-Hammond et al., 2007). Professional development opportunities also include benefits of time with peer cohorts, networking with other principals, and “cluster” learning where principals can learn from each other (Barber et al., 2010). As Mitgang (2012) states about new principals: “Without expert guidance and encouragement, a novice can quickly feel ground down by the loneliness at the top” (p. 24). Intensive supports that follow principals beyond preparation training can help them succeed and persevere in their roles.

Experienced principals

Experienced school leaders are still well served by leadership development and supports. Less is known about supports for experienced principals and structured programs for this group are not widespread (Darling-Hammond et al., 2007). Recommendations for principal professional development from the National Staff Development Council of the United States include:

- Ongoing membership in study groups that deal with the most important instructional issues
- Connection with colleagues at other schools to learn innovative practices, provide constructive critique, and support one another’s efforts in improving instruction
- In-school coaching on skills such as collaborating with teachers on instruction practices, analyzing data, and assessing student work (2000). As a principal continues in their career, they will need more sophisticated leadership skills that build on their prior experiences and the context of their school: “different principals need different kinds of supports” (Darling-Hammond et al., 2007, p.7). Barber et al. (2010) identified the trend of leadership projects that can address this need; principals build on their leadership skills while working towards a specific goal for their school, rather than “leadership development for its own sake” (p. 19).

Continued leadership development can support principals in becoming high performing school leaders, ultimately improving both schools and the overall leadership capacity of a district. High achieving principals are also well prepared to take on other leadership roles in the district, such as secondments, committees, or serving as superintendent (Barber et al., 2010; Darling-Hammond et al., 2007). Barber et al. (2010) also noted the programming trend of high performing principals having opportunities to help develop other schools and contribute to improving and growing new leaders. This style of leader development is practiced by Victoria, Australia with a satisfaction rating from participating principals of over 90 percent.

Supports for in-service principals should also be considerate of their professional and personal concerns for their careers. In nationwide workshops, Canadian principals cited principal retention, professional isolation, lack of specialist support, and job-related stress among their concerns for the current roles of principalship (CAP-ATA, 2014). Professional development for principals may help alleviate these concerns, directly or indirectly, by providing more networking and wellness education opportunities within continued leadership training. Leadership supports for experienced principals should consider career longevity and retention of leaders. Though little research exists on the impact of leadership training on principal retention, the time and

cost in recruiting and preparing new principals could be reduced by instead focusing on increasing principal tenure with supports (Mitgang, 2012).

Program Delivery

Principal leadership development programs may be offered through universities/university partnerships, in-house within a district, or through an independent third party organization. The time commitment of programs varies greatly and programs may be full-time, part time, or completed through a series of sessions. A principal preparatory program may be as short as four months or completed through workshop settings (Barber et al., 2010). Traditional “one-shot” sessions have been widely critiqued for having limited impact (Barber et al., 2010; Davis et al., 2005). Indeed, the exemplary programs from Darling-Hammond et al. (2007) ranged from one year full time programs, two year part time programs, and 18 month part time programs. These exemplar programs were presented as effective and rigorous; many of them including continued supports and professional development for in-service principals.

Beyond the coursework of a program, continued professional development, internships, or mentorship programs may extend the supports and program hours for a participating principal. A program such as School Leader Building in New York, consists of coursework, a 320-hour internship, and is followed by 175 hours of professional development to be completed over five years to maintain certification (Barber et al., 2010). For principal qualifications, some systems will require a Masters degree in addition to completion of a leadership certification program (Barber et al., 2010).

COACHING AND MENTORING

Coaching and mentorship is a recurring recommendation in the literature for effective principal preparation and ongoing leadership development. Coaching and mentoring is growing throughout a variety of professional settings as many careers have noted its benefits to staff development.¹⁸ Along with the field of mentorship, the amount of research on organization, mentor selection, the mentor-protégé relationship, and other facets of coaching and mentoring has also greatly expanded. In this section, we will focus on the role of formal mentorship and coaching for new and aspiring principals and explore the role of coaching and mentorship in further detail.

¹⁸ Scott, I., & Spouse, J. (2013). Practice based learning in nursing, health care, and social care: Mentorship, facilitation, and supervision. Chichester, UK: Wiley-Blackwell. <https://www.wiley.com/en-us/Practice+Based+Learning+in+Nursing%2C+Health+and+Social+Care%3A+Mentorship%2C+Facilitation+and+Supervision-p-9780470656068>

In the previous section, coaching and mentoring was an overall finding from effective leadership development programs as well as especially relevant to the development of new principals. Further, from a study on the perceived efficacy of a national principal mentorship program, “...every new principal deserves the support of a mentor ... principal mentoring is a valuable tool in both building quality school leaders and keeping good principals”¹⁹; not only new principals, but principals across career stages have been shown to benefit from coaching and mentoring.

In the broader literature, coaching and mentoring as terms may be separately defined or used interchangeably. For our purposes in leadership development, we will consider them as two components of one teaching strategy: mentoring as a focus on advocacy, support, counsel, and feedback, and coaching as a more instruction-based approach to specific job skills, knowledge, and behaviours.²⁰ Both contribute to the learning relationship between an experienced principal and a protégé principal.

In the educational setting, coaching and mentoring is consistent with the practices of instructional leadership as it strives to improve practices at school level that will ultimately impact student achievement.²¹ Recent research using randomized control trials in two US districts found that sites that focus on mentoring and coaching “improved their implementation” and “beginning teachers in treatment schools were more likely to be assigned a mentor” than control schools, leading to improved student achievement and instructional effectiveness²².

The existing research has identified common benefits for participants in coaching and mentoring as an intensive support for new and aspiring principals:

- *Ongoing support* - mentorship relationships are more extended learning opportunities than a one-time workshop. The ongoing support can be more in depth, personalized, and responsive to career changes and challenges (Knight, 2009; Darling-Hammond et al., 2007; Davis et al., 2005; Hopkins-Thompson, 2000).
- *Dialogical or Learner Centered* - new principals are supported and guided through problem solving and not simply told what to do; principals increase their independence, confidence, and efficacy in skills (Sciarappa & Mason, 2014; Knight, 2009; Davis et al., 2005).

¹⁹ Sciarappa, K., & Mason, C.Y. (2014). National principal mentoring: Does it achieve its purpose? *International Journal of Mentoring and Coaching in Education*, 3(1), 51-71, p.68. <https://drive.google.com/open?id=1XBnUT8JG8izdk-vyuRaPI5Mg2MBRtzo1>

²⁰ Hopkins-Thompson, P.A. (2000). Colleagues helping colleagues: Mentoring and coaching. *National Association of Secondary School Principals, NASSP Bulletin* 84(617), 29-36. <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.858.6483&rep=rep1&type=pdf>

²¹ Knight, J. (2009). Coaching: The key to translating research into practice lies in continuous job embedded learning with ongoing support. *National Staff Development Council* 30(1),18 -22. https://drive.google.com/open?id=1PH7iYK99s-B0v_wMSXBxMS_NfWwLCJp7

²² Schmidt, R., Young, V., Cassidy, L., Wang, H., & Laguarda, K. (2017). Impact of the New Teacher Center’s New Teacher Induction Model on Teachers and Students. *SRI Education*. https://www.sri.com/sites/default/files/publications/ntc_i3_validation_eval_brief.pdf

- *Job embedded* - training is provided at the field level, reducing the distance between learning and implementation of skills as well as being relevant to current demands of the principalship (Schmidt, Young, Cassidy et al, 2017; Knight, 2009; Davis et al. 2005; Hopkins-Thompson, 2000).
- *Collaborative* - the best mentorship practices are formed on the basis of a collaborative relationship; learners have choice in their learning and mentors are an equal partner who will also benefit from the learning relationship (Sciarappa & Mason, 2014; Knight, 2009; Davis et al., 2005; Hargreaves & Fullan, 2000; Hopkins-Thompson, 2000).
- *Retention* - mentorship can increase the probability that new principals will remain in their roles (Bloom et al, 2005 in Sciarappa & Mason, 2014). Mentor support through career challenges, even for the experienced principal, is beneficial to their career longevity (Hopkins-Thompson, 2000).
- *Socialization* - fostering a sense of belonging and understanding of the school and system culture (Sciarappa & Mason, 2014). Scott and Spouse (2013) refer to this as the “hidden curriculum”, learning the way a professional group speaks, behaves, and interacts with one another. This is important to a sense of belonging and not expressly learned in course based principal or teacher preparation.

Principals have been shown to value coaching and mentorship. In Sciarappa and Mason (2014), principals who participated in a US-based national formal mentorship program were most appreciative of their mentors’ support in instructional leadership over other skill supports. A majority of respondents also reported enjoying or feeling successful in their principalship; and 80% recommended that all new principals receive mentoring. In principal professional development, receiving mentoring from an experienced principal is less common than other forms of professional development (Darling-Hammond et al., 2007). Those who participate in mentorship or coaching rate it as the most helpful form of professional development they have received.

Coaching is also valuable for instructional leadership. In Tennessee, studies of two different coaching programs for teachers demonstrated improved student learning for the classes of participating teachers²³. The student learning improvement was greatest for the coaching program that was more individualised and personal. Student achievement also improved in math when new teachers were mentored by retired teachers in a program in Colorado, when compared to a group mentored by in-school colleagues.²⁴ The researchers also discuss how utilising retired professionals as mentors can provide more schedule flexibility, assist in

²³ Archer, J. (2007). Tennessee’s professional learning challenge: aspirations, assumptions, and knowledge gaps. *Tennessee Education Research Alliance*.
https://peabody.vanderbilt.edu/research/tnedresearchalliance/files/TNs_Professional_Learning_Challenge_TERA_Brief.pdf

²⁴ DeCesare, D., McClelland, A., & Randel, B. (2017). *Impacts of the retired mentors for new teachers program*. Washington, DC: US Department of Education, Institute of Education Sciences, National Centre for Education Evaluation and Regional Assistance, Regional Educational Laboratory Central. https://ies.ed.gov/ncee/edlabs/regions/central/pdf/REL_2017225.pdf
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succession training, and lower the cost of the mentorship program as the mentor educators would not have to leave their duties or classrooms.

For new and aspiring principals to receive the benefits of coaching and mentoring, and for schools to see the value, coaching and mentoring has to be implemented properly. Recommendations for coaching and mentoring in the educational context from Knight (2009) include establishing learning friendly culture, clear roles as peers for the coach and principal, and the coach as a role model for continuous learning. In addition, the dedication of time and efficient use of time for the coaching to occur should be supported. In beginning a formal mentorship program, Hopkins-Thompson (2000) calls for organizational support from the district or superintendent, clearly defined goals for the relationship, a process for screening and pairing principals, and training for mentors and protégés for program expectations and procedure. Based on criticisms of mentorship programs in education, Hargreaves and Fullan (2000) recommend that the innovation of new educators be promoted in the relationship and not be eclipsed by more traditional practices of the mentor.²⁵ In addition, they call for the personal and emotional support of new educators to extend beyond the mentor to the professional community. Overall, Hargreaves and Fullan believe that the mentorship relationship of the new and the experienced should fuel change and improvement for both the school's performance and the school culture. In terms of the instructional leadership of a new principal, this is especially relevant as they will be seeking ways to improve student learning in their new role.

²⁵ Hargreaves, A., & Fullan, M. (2000). Mentoring in the new Millennium. *Theory into Practice*, 39(1), 50-56.

https://drive.google.com/open?id=14AKJ48hQIZIMGTpilzpt8GN0pOy_nolt

CONCLUSION

In conclusion, we review the main points that directly address our research questions. In addition, we present key considerations that emerged from the review of the literature.

Based on our review of the literature, we established the definition of instructional leadership as follows: Instructional leadership involves principals becoming leading learners who successfully nurture a learning community that supports and improves student achievement.

This led us to assemble skills for instructional leaders that emerge in the research literature. From the examples presented, the common skills included communication/people skills, staff development, and strategic goal setting. All skills were directed towards improving student outcomes. Of note, the skill of staff development was suggested in the research as having the strongest impact on student learning. Finally, two case studies demonstrated how defining instructional leadership and identifying the skills needed can lay the foundation for a robust leadership framework for principals.

Principals require meaningful, high quality supports for leadership development. From our review of the research on exemplary leadership programs, we determined that leadership development should include principles of adult learning, field experience, selective recruitment, evaluation, and coaching/mentoring. As Fullan (2014) states, “The fact remains, however, that the administrative and improvement burden has dramatically increased for principals over the last decade.... Principals do need better support” (p. 57).

While these elements of effective programs are generalizable to all career stages, there were some key considerations for new, aspiring, and experienced principals. Aspiring principals in effective leadership development were rigorously selected and often learned in cohort groups. New principals require intensive support and often this was provided through supervised field work and coaching/mentoring. Finally, the experienced principals should still receive ongoing leadership development, can also benefit from mentorship, and may enjoy taking on projects and service beyond their own school.

We also found that coaching and mentorship has value in developing instructional leaders. From our review, coaching and mentoring programs were found by principals to be helpful, appreciated, and recommended for other new principals. From the perspective of instructional leadership, coaching and mentoring in the educational setting can also lead to improved student outcomes. A program for coaching and mentoring can provide needed intensive support for new principals but also may help experienced principals overcome career challenges and innovate their own practices.

Key Considerations

In pursuing the research questions of the review, topics of consideration emerged from the literature.

Begin an intentional process of defining instructional leadership and then outline the many benefits to strengthen the daily work of principals: The research literature is clear that defining instructional leadership for principals is a key first step before building frameworks or implementing research-based high impact strategies to refine principal school leadership. This effort should not be limited to the principalship, as it is clear that there are linkages with the intentional development of other systems leaders such as superintendents, directors, consultants and other staff. We don't believe that the definition of instructional leadership is overly complex; rather, the complexity comes into play when engaging around issues surrounding implementation of high impact strategies in variable situations. As Century, Rudnick, and Freeman (2010) suggest, while questions of the effectiveness of interventions and impacts can be "deceptively" simple to ask, these types of questions "move us from merely knowing if a program works towards understanding why, how, and under what conditions" it works.

Consider stressors around workload: A recurring theme of the literature was the challenge of the principal's expanding role. Principals must be sure managerial tasks are carried out and day-to-day demands are met (Fullan, 2014), on top of engaging with new initiatives. For leadership development to be perceived as meaningful and a help rather than simply adding to "the inbox," the many roles of the principal could be prioritized or, as Fullan suggests, the delegation of managerial work considered and oriented in relation to questions around impact and student achievement.

Make time available to dedicate to leadership development: Similar to the concern of workload, time is a finite resource for school leaders and it is quickly spent in the everyday demands of principalship. From our research, we know that exemplary programs are longer term and that "one-shot" workshops are criticised for their limited impact. To make the most efficient use of the time, principal leadership training should consider job-embedded learning opportunities whenever possible. This is done effectively through coaching and mentoring and, as DeCesare, McClelland, and Randel (2017) recommend, retired principals can provide mentorship on a flexible schedule with no time lost to the mentor's own work.

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