



Developing Strategic Thinking & Interpersonal Skills in School Principals

Yearlong Supplemental Professional
Development Curriculum

District Leadership Forum

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Leadership Development Curriculum



Toolkit Overview

Strategic thinking and **interpersonal skills** are essential to developing strong school leaders, yet these competencies are rarely explicitly taught. This leadership development curriculum aims to equip principals with these core competencies through six sessions administered across the academic year. While this guide is not exhaustive, use the lessons to supplement your district’s current principal development curriculum.

These sessions can be presented in a series, as shown in the recommended sequence below, or introduced independently at any time during the year.

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For more guidance on developing effective school leaders, read the full executive briefing **Preparing Principals to Lead** on eab.com.



Summer Principal Training

Introducing Strategic Thinking & Interpersonal Skills

SUMMER

Self-Assessing Leadership Skills p. 5
School Goal-Setting and Action-Planning p. 8

SUMMER



Self-Assessing Leadership Skills

Overview

Meta-research suggests that top performing leaders are consistently strong in two core leadership competencies– strategic and analytical thinking and interpersonal skills– regardless of their industry. This session will guide school leaders in assessing their own personal strengths and opportunities for growth relating to strategic thinking and interpersonal skills.

Objectives

At the conclusion of this training, school leaders will be able to:

- Assess levels of confidence in foundational strategic thinking and interpersonal skills
- Define areas of strength and improvement in strategic thinking and interpersonal skills

Resources

Time: 45 minutes

Materials: Core Leadership Skills Self-Assessment (1 per person)

Lesson Plan

- 1 Independent Activity – 10 MIN**
Have principals independently complete both pages of the Core Leadership Skills Self-Assessment worksheet.
 - 2 Small Group Discussion – 15 MIN**
Ask principals to make small groups based on school level (elementary, middle, high school) to share their overall reflections from the exercise.
 - 3 Whole Group Discussion – 20 MIN**
Have a representative from each group summarize what they discussed and learned with the larger group.
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- 4 (Optional) Take-Home Assignment**
Ask principals to read the “Preparing Principals to Lead: Executive Briefing”, a summary of the larger research study conducted by EAB on effective principal development. Access the executive briefing [here](#), or by searching “Preparing Principals to Lead” on eab.com.

Core Leadership Skills Self-Assessment



Directions: Rate your confidence in the following foundational areas of strategic thinking and interpersonal skills. Calculate your sub score for each category, then continue to the following page to complete a qualitative analysis of your quantitative scores.



Strategic Thinking

	<i>Rarely</i>			<i>Consistently</i>	
I am aware of the details and challenges of running a school.	1	2	3	4	5
I can accurately predict what could go wrong when implementing new initiatives.	1	2	3	4	5
I define a vision and strategy when addressing underlying root problems.	1	2	3	4	5
I use data to monitor the effectiveness of school practices and inform strategy.	1	2	3	4	5
I am willing to challenge the status quo.	1	2	3	4	5
I provide materials and professional development that target underlying school needs.	1	2	3	4	5
I establish clear goals that are kept in the forefront of the school's attention.	1	2	3	4	5
I make data-informed resource allocation decisions.	1	2	3	4	5

Sub Score:



Interpersonal Skills

	<i>Rarely</i>			<i>Consistently</i>	
I adjust my leadership approach to the needs of the current situation, and I am comfortable with dissent.	1	2	3	4	5
I work to establish trusting relationships with staff and teachers.	1	2	3	4	5
I promote a value for shared beliefs, community, and cooperation.	1	2	3	4	5
I recognize and reward individual accomplishments.	1	2	3	4	5
I establish strong lines of communication with and among teachers and students.	1	2	3	4	5
I inspire and help lead new and challenging innovations.	1	2	3	4	5
I seek school governance that empowers staff and students and encourages commitment, broad participation, and shared accountability for outcomes.	1	2	3	4	5
I ensure teachers feel included and have a major role in decisions about professional development and curriculum.	1	2	3	4	5

Sub Score:

Core Leadership Skills Self-Assessment (cont.)

INTERPRETING YOUR SUB SCORES

Sub Score Range *Skill Maturity Stage*

0 - 15 **Early**

16 - 30 **Intermediate**

31 - 40 **Confident**

Assessing Confidence Levels of Foundational Skills



While these numerical values don't correlate to levels of expertise in strategic thinking or interpersonal skills, use the maturity stages to the left as a method for self-assessing relative confidence and awareness of foundational skills within these two leadership competencies.

Strategic & Analytical Thinking

What are my strengths in **strategic and analytical thinking**?

In what ways can I improve in this competency?

Interpersonal Skills

What are my strengths in **interpersonal skills**?

In what ways can I improve in this competency?

SUMMER



School Goal-Setting and Action-Planning

Overview

To improve strategic thinking skills, principals should first assess the current state of their school to effectively plan and work toward future goals. This session will break down the analytical process of goal-setting as a foundation for further strategic thinking around school issues.

Objectives

At the conclusion of this training, school leaders will be able to:

- Measure areas of strength and improvement in their schools in order to narrow the focus of a long-term goal
- Analyze necessary steps required for goal implementation and assessment

Resources

Time: 60 minutes

Materials: School Year Goal Setting Template (1 per person); white board or flip chart; markers

Lesson Plan

1 Independent Activity – 20 MIN

Assign each principal to independently complete the School Year Goal Setting Template for their respective school.

2 Large Group Discussion – 20 MIN

- Ask principals to share their goals and rationale with the larger group. During this time, the facilitator should take notes on a white board or flip chart.
- Circle or write out common themes after every principal shares their goals with the group (i.e., reading growth, social emotional learning, etc.).

3 Small Group Breakout – 20 MIN

- Write down the following guiding discussion questions on the white board or flip chart to encourage meaningful collaboration and peer support:
 1. *What are the strengths of the action plan?*
 2. *What open questions or potential risks do you imagine could arise?*
 3. *What recommendations do you have for improvement?*
- Ask principals to gather into small groups to share their action steps and implementation plans, as well as discuss the guiding questions.

School Year Goal-Setting Template



Directions: Complete the goal setting template by reflecting on the strengths and areas for improvement in your school. Then, record your top goal for the year as well as what success might look like once the goal is reached.

Examining School Trends

School Strengths: What school strengths do you want to maintain this school year?

Areas for Improvement: Where do you see opportunity for school growth?

Setting This Year's Goal

Goal(s): What high-level goal do you have for your school this year? [Note: Please list your top goal for the year]

Measures of Success: What would success look like? How do you plan to measure it?

School Year Goal Setting Template (Cont.)



Directions: After completing the previous page, list up to four action steps necessary to reach your goal. Then, write your school's strengths, potential risks, and mitigation strategies you will need to consider before designing an implementation plan for each action step.

Action Steps		
Action Step # 1:		
School Strengths That Will Help Me Take This Step	Barriers that Make Taking this Step Difficult	Strategies for Overcoming Barriers
Implementation Plan What: When: How:		
Action Step # 2:		
School Strengths That Will Help Me Take This Step	Barriers that Make Taking this Step Difficult	Strategies for Overcoming Barriers
Implementation Plan What: When: How:		

School Year Goal Setting Template (Cont.)

Action Steps (Cont.)		
Action Step # 3:		
School Strengths That Will Help Me Take This Step	Barriers that Make Taking this Step Difficult	Strategies for Overcoming Barriers
<p>Implementation Plan</p> <p>What:</p> <p>When:</p> <p>How:</p>		
Action Step # 4:		
School Strengths That Will Help Me Take This Step	Barriers that Make Taking this Step Difficult	Strategies for Overcoming Barriers
<p>Implementation Plan</p> <p>What:</p> <p>When:</p> <p>How:</p>		



Fall Principal Trainings

Strategic & Analytical Problem Solving

FALL

Root Cause Analysis: Problem Identification p. 13

Root Cause Analysis: Determining Solutions p. 15

FALL



Root Cause Analysis: Problem Identification

Overview

Root cause analysis involves asking a series of “whys” to get to the potential root of a problem, helping solutions be based on rigorous analysis rather than gut feelings or assumptions. This session will introduce school leaders to the first step of root cause analysis: identifying school problems.

Objectives

At the conclusion of this training, school leaders will be able to:

- Identify and prioritize key issues in the school to be addressed
- Define the strengths, weaknesses, opportunities, and threats to the school to begin the root cause analysis process

Resources

Time: 50 minutes

Materials: Identifying School Issues (1 per person); white board or chart paper; markers

Lesson Plan

- 1 Independent Activity – 10 MIN**
Assign each principal to independently complete the SWOT analysis on the Identifying School Issues worksheet.
- 2 Small Group Breakout – 15 MIN**
Ask principals to make small groups to share their responses to each segment of the SWOT analysis.
- 3 Whole Group Discussion – 15 MIN**
Have a representative from each group summarize what they discussed and learned with the larger group. Record common responses on a large SWOT grid on white board or chart paper.
- 4 Independent Activity – 10 MIN**
Allow principals to complete the bottom table of the Identifying School Issues worksheet, prioritizing the key issues they’d like to address in their respective schools.

Identifying School Problems: SWOT Analysis



Directions: Complete the following SWOT analysis to identify your school's most pressing problems within your control. Then, choose four school issues that emerged through the SWOT exercise and record them on the table at the bottom of the page according to the listed criteria.



STRENGTHS

- *What does the school do well?*
- *What resources are consistently available?*
- *What do parents, staff, and faculty see as the school's strengths?*



WEAKNESSES

- *What could the school improve?*
- *Where are there fewer resources than others?*
- *What are parents, faculty, or staff likely to see as weaknesses?*



OPPORTUNITIES

- *What new opportunities are open to the school?*
- *What trends could the school take advantage of?*
- *How can strengths be turned into opportunities?*



THREATS

- *What threats could harm the school?*
- *What threats do the school's weaknesses expose?*

Priority Issues

List the top 4 school issues emerging from the SWOT analysis above. Make sure each issue meets the following criteria listed below.

- 1.
- 2.
- 3.
- 4.

Criteria for a Priority Issue

- The issue is within the principal's locus of control
- Progress and success can be easily measured
- The issue impacts most students, families, and/or faculty

FALL



Root Cause Analysis: Determining Solutions

Overview

This second session on root cause analysis aims to solve the school problems identified in the previous session, walking school leaders through the full root cause analysis process. After the conclusion of this session, principals are encouraged to share root cause solutions with a supervisor and implement a plan of action to address them.

Objectives

At the conclusion of this training, school leaders will be able to:

- Determine the root causes of a specific school issue through structured, strategic thinking
- Prioritize which solutions are most actionable to address the original school issue

Resources

Time: 75 minutes

Materials: Root Cause Analysis Cheat Sheet (1 per person); Step-by-Step Root Cause Analysis (1 per person); Root Cause Problem Solving Template (1 per person); white board or flip chart; markers

Lesson Plan

1 Whole Group Discussion – 15 MIN

- On a whiteboard or chart paper, write the overarching example problem “*Second grade students struggle to read.*” Ask principals to brainstorm possible reasons that second grade students in their schools might struggle to read. Record answers on the board or chart paper.
- Discuss as a whole group how principals might decide which “reasons” are the right ones to tackle or which are in their locus of control and most accessible to solve (*this should be difficult*).
- Distribute Root Cause Analysis Cheat Sheet and Step-by-Step Root Cause Analysis handouts to all principals. Ask principals to share how this strategy is a more effective way of targeting the causes of a particular problem.

2 Small Group Breakout – 25 MIN

- Have principals break into small groups. Instruct each group to share school issues identified in Session 1 (SWOT Analysis & Identifying School Issues), then have each group choose one problem on which to perform root cause analysis together.
- Instruct principals to complete Step-by-Step Root Cause Analysis for their chosen problem, working together as a group.

3 Whole Group Discussion – 15 MIN

Have a representative from each group summarize what they discussed and learned with the larger group.

4 Independent Activity – 20 MIN

Allow principals to perform their own root cause analysis using the Root Cause Analysis Template (p. 19). Have principals share results with a supervisor in order to take action on key root causes.

Root Cause Analysis Cheat Sheet



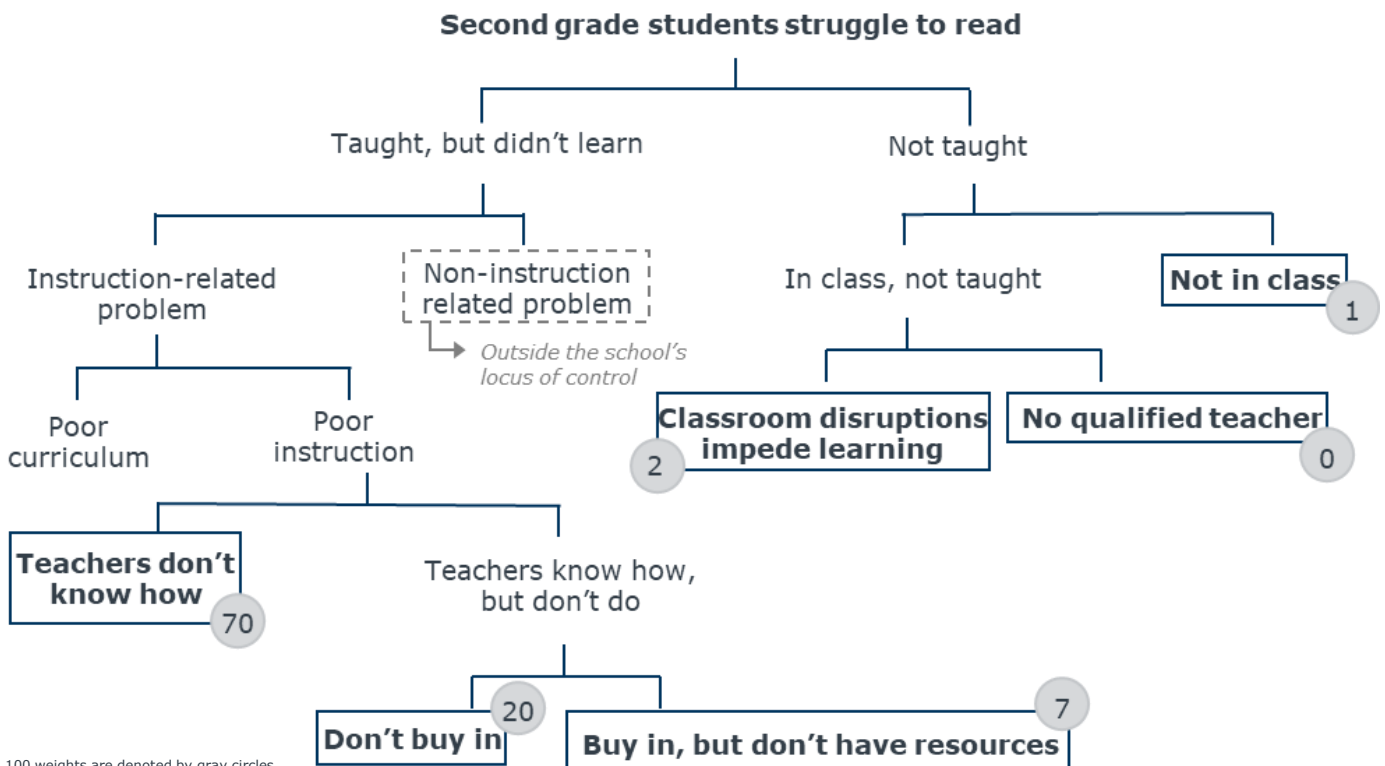
Root cause analysis is a method of strategic thinking that helps determine the origin of a problem through asking a continuous chain of probing *whys*. Oftentimes, we may be devoting wasted resources to treating a “symptom” of a problem instead of an actual root cause. Use root cause analysis to identify breakdowns in a system and focus on core problems.

4 Steps to Perform Root Cause Analysis

- 1 **Begin with a problem statement** defining a school issue within your locus of control. Use the SWOT analysis exercise from Session 1 to define priority issues in your school.
- 2 **Ask probing *whys* for the initial problem.** Withhold assumptions, and only list possibilities that can be demonstrated through data or other evidence.
- 3 **Categorize various reasons into mutually exclusive categories,** identifying two reasons to create the next level of the root cause tree.
- 4 **Continue asking *whys* for each subsequent level of the root cause tree.** Prioritize which root problems to address by distributing 100 weights across all final causes.¹

Example Root Cause Analysis

This **abbreviated** sample root-cause analysis breaks down the possible causes for a school’s second-grade reading problem. Each of the four steps above is modeled in the example below.



1) 100 weights are denoted by gray circles in root causes analysis example

Step-by-Step Root Cause Analysis



Directions: Below is a more detailed walkthrough of each step of root cause analysis defined on the Root Cause Analysis Cheat Sheet. Use this step-by-step explanation to help guide you through the root cause analysis process.

Step 1: Choose a Problem Statement

Identify a school issue within your locus of control. Use the SWOT analysis exercise from Session 1 to define priority issues in your school. Try to summarize it in less than 10 words.

Example:

Second grade students struggle to read

Step 2: Ask Probing *Whys*

Ask probing *whys* to create a list of possible reasons for the school issue to have occurred. For easier analysis, keep language simple, and only list possibilities that are known and provable with data.

This list will then be reduced to two mutually exclusive reasons in **Step 3**.

Example:

Second grade students struggle to read

Why?

Missed instruction in phonics

Doesn't read regularly at home

Insufficient curriculum

Teacher not fully trained in curriculum

Inappropriate grouping level

Classroom disruptions impede learning

Incorrect pace of instruction

Step 3: Refine List of *Whys* into Mutually Exclusive Categories

Sort all possible reasons listed above into **MECE** categories (**M**utually **E**xclusive and **C**ollectively **E**xhaustive), meaning there is no overlap between them, or outside possibilities not already covered within them.

Example:

Second grade students struggle to read

Why?

Missed instruction in phonics

Doesn't read regularly at home

Insufficient curriculum

Teacher not fully trained in curriculum

Inappropriate grouping level

Classroom disruptions impede learning

Incorrect pace of instruction

Taught, but didn't learn

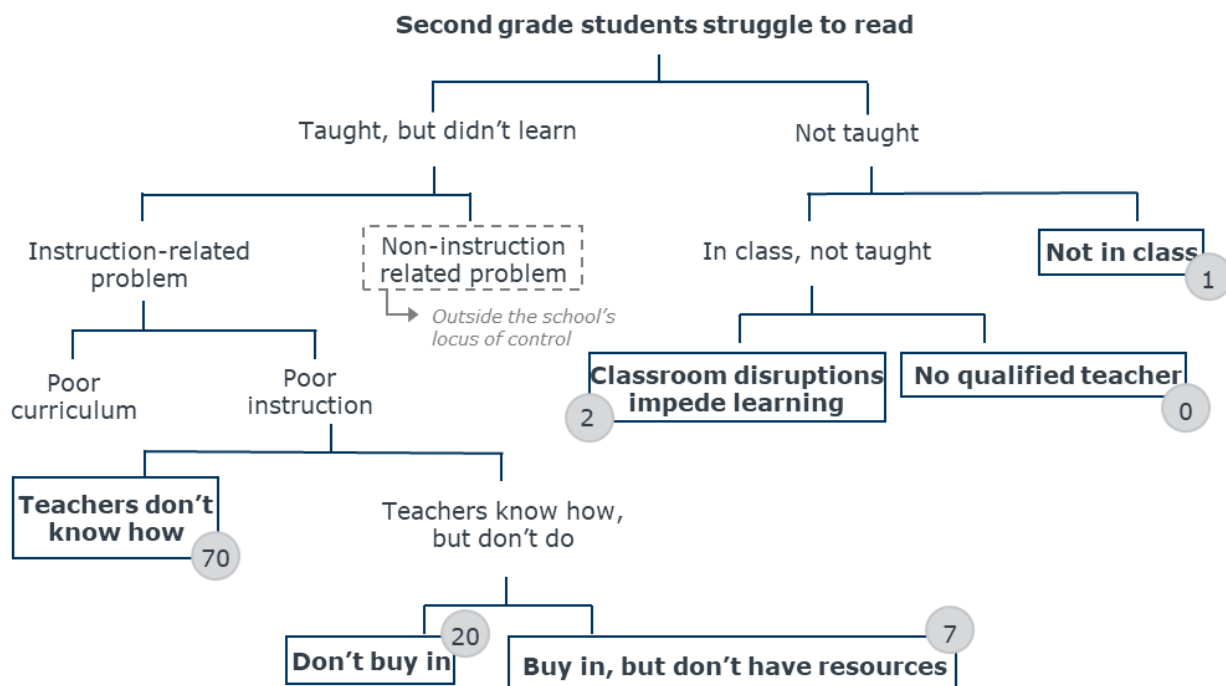
Not taught

Step-by-Step Root Cause Analysis (Cont.)

Step 4: Identify and Weight Root Causes

Continue asking *whys* for each subsequent MECE level of the root cause tree. Ideally, the root cause tree with consist of **five** MECE levels. Once all root causes have been identified, prioritize which causes to address by distributing 100 weights across all roots. In the example below, final root causes are boxed and 100 weights are distributed in gray circles.

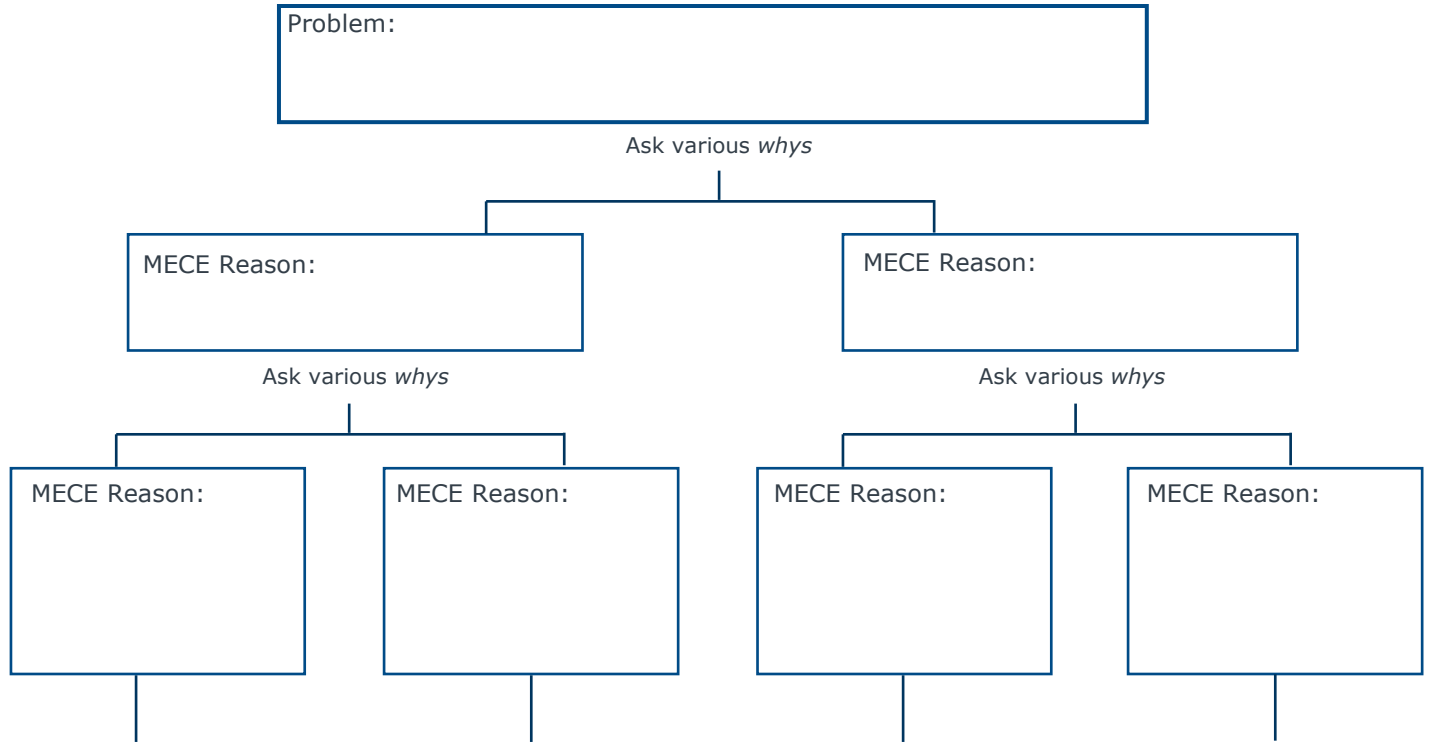
Example:



Root Cause Problem Solving Template



Directions: Using the Root Cause Cheat Sheet for step-by step instructions, fill in and continue the root cause analysis tree below by adding boxes or using additional paper until your root cause tree is complete.





Winter Principal Training

Building Interpersonal Skills

WINTER

Brain-Based Interpersonal Skills Workshop P. 21

WINTER



Brain-Based Interpersonal Skills Workshop

Overview

Certain interpersonal behaviors can prompt positive responses of safety in the brain, allowing school leaders to improve the quality and productivity of interactions with faculty and staff. This session allows principals to identify their own interpersonal skills as well as build a plan for improving behaviors and responses that instill a culture of safe & effective communication.

Objectives

At the conclusion of this training, school leaders will be able to:

- Identify and define behavioral techniques to be incorporated into daily use that facilitate improved leadership and relationship-building
- Reflect on personal behavior and communication preferences to improve self-awareness

Resources

Time: 70 minutes

Materials: Pre-reading handout: Costa, A & Garmston, R. 2003. "[Cognitive Coaching in Retrospect: Why it Persists](#)" (1 per person); Interpersonal Skills That Trigger Safety in the Brain (1 per person); Brain-Based Interpersonal Skills Planning Template (1 per person); Behavioral Techniques Role-Play Exercise (1 per partnership); TV or projector screen with access to YouTube, white board or flip chart; markers

(Optional) Additional Reading & Lessons: *Cognitive Coaching, 3rd Edition* by Arthur L. Costa and Robert J. Garmston with Jane Ellison and Carolee Hayes

Lesson Plan

1 Whole Group Discussion – 20 MIN

Prior to this session, principals should read the article "Cognitive Coaching in Retrospect: Why It Persists." Post the following discussion questions on the board to facilitate a conversation on the topics presented in the article.

1. *How do the theories presented in Cognitive Coaching compare to your personal approach to communication?*
2. *Which of the supporting elements of Cognitive Coaching would you benefit most from implementing in your school culture?*

2 Video Discussion – 10 MIN

As a whole group, review "Behavioral Techniques That Trigger Safety in the Brain." Play the video linked on the worksheet and ask principals to place check marks next to the behaviors they witness in the video.

3 Independent Activity – 10 MIN

Instruct principals to complete the "Behavioral Techniques Planning Template" independently.

4 Whole Group Discussion – 15 MIN

Invite principals to share various responses to the behavior techniques to which they will commit throughout the next month (from "Behavioral Techniques Planning Template").

5 Small Group Activity – 15 MIN

Instruct principals to partner with a colleague in the room and complete the role-play exercise, following the directions on the handout.

Interpersonal Skills That Trigger Safety in the Brain



Directions: These behaviors are linked to stimulating feelings of safety in the brain. When our brains feel safe, we are more likely to be open to constructive feedback and engage in meaningful coaching conversations. Use this list to identify which behaviors are at play in the video "[Model Coaching Conversation](#)", linked in the footnote below.¹



Behavioral Techniques

- ❑ **Sit at a 90-degree angle** from the other person when providing feedback. Sitting to the side of someone, as opposed to across from them, helps prevent responses of fear and defensiveness.
- ❑ **Match postures, gestures, and tone/volume of voice** to establish rapport and build comfort.
- ❑ **Match demonstrated language and vocabulary** when speaking of the same topic or content. Avoid abbreviations without clarifying their meaning.
- ❑ **Pause to give the other person time to think** and craft meaningful responses. Let them know taking time to think is welcome.
- ❑ **Provide data or sources of data that can be reviewed in real-time**, allowing the other person to reflect and make their own deductions.
- ❑ **Offer various formats for processing information**, such as visual, audio, and/or technological representations of the topic at hand. Rely on the other person's desired format of communication.



Verbal Techniques



- ❑ **Paraphrase the other person's responses** before posing further questions.
- ❑ **Paraphrase the other person's emotions** to clarify and acknowledge how they may be feeling.
- ❑ **Invite multiple responses to a question** by incorporating plurals into the question stem.
 - "What are your goals for this semester?"
 - "What ideas do you have?"
- ❑ **Use words that express tentativeness rather than permanence** to invite creativity and reduce pressure.
 - "What solutions might you try?"
 - "What guesses do you have to explain this result?"
- ❑ **Craft sentences that include positive presuppositions** to influence positive thinking.
 - "How will you measure success of your project?" (This presupposes that the project will be successful)
 - "Given your experience in Project Based Learning, what are your ideas for this initiative?" (This presupposes valued experience and knowledge)
- ❑ **Ask clarifying questions when generalizations are made**, or vague concepts are discussed.
 - "Who specifically is 'they'?"
 - "What will it look like to 'understand'?"
 - "When you say she is 'better', better than what?"

1) <https://www.youtube.com/watch?v=AfbvspitraU>

Brain-Based Interpersonal Skills Planning Template



Directions: After reviewing the list of behavioral techniques that trigger safety in the brain, list 1–2 things in each area that you already do and 1–2 things that you would like to do when interacting with your staff. Then choose 3–5 things from your list that you can make a commitment to doing in the next month.

 <p>Behavioral Techniques</p>	Techniques I already use:	Techniques I would like to improve:
 <p>Verbal Techniques</p>	Techniques I already use:	Techniques I would like to improve:

Opportunities to Practice the Above Techniques

List 3-4 opportunities (meetings, interactions, conversations, etc.) next month when you can practice the techniques you'd like to improve.

Example: "Throughout teacher evaluation meetings the next month, I will arrange my office to accommodate sitting at a 90-degree angle instead of sitting on opposite sides of my desk."

-
-
-
-

Behavioral Techniques Role-Play Exercise



Directions: With a colleague, cut apart and distribute the role-play scenarios listed below. Use the background information and general feedback provided to script a conversation communicating the feedback effectively to the person role-playing the teacher. After completing one role-play scenario, switch roles and complete the other scenario.

While conversing, focus on demonstrating the 3-5 behavioral techniques you committed to practicing in the next month (recorded on the *Behavioral Techniques Planning Template*). Ask your colleague to look for these behaviors throughout the role-play scenario.



Scenario 1: A principal is providing feedback to a first-year teacher. The teacher is nervous about receiving feedback and has been known to shut down when faced with criticism. This is their first evaluation meeting.

Positive Feedback	Constructive Criticism
<ul style="list-style-type: none"> • 100% of students are engaged and participating • Enthusiasm for content is evident in both teacher and students • Good use of visual aides throughout lesson 	<ul style="list-style-type: none"> • Several students continue to call out; teacher is inconsistent in managing this behavior • Expectations were not clear on how students were to complete independent assignment; many completed it without understanding the directions • Unclear whether lesson plan objective was achieved by end of lesson



Scenario 2: A principal is providing feedback to a tenured teacher. The teacher has been teaching for over 20 years and is particularly set in their ways.

Positive Feedback	Constructive Criticism
<ul style="list-style-type: none"> • Classroom management is consistent, and expectations of behavior are clear • Content of lesson clearly supports objective 	<ul style="list-style-type: none"> • Transitions between whole group instruction and independent work could be quicker; students were idling • Students might benefit from small group intervention work rather than consistent whole-group instruction



Spring Principal Training

End-of-Year Self-Assessment

SPRING

Reflecting on Core Leadership Skills P. 26

SPRING



Reflecting on Core Leadership Skills

Overview

As principals wrap up the school year, it is important to provide space for reflecting on professional and personal goals set at the beginning of the year. This session will call upon the goals set in the first summer session and build upon the strategic thinking and interpersonal skills gained throughout the year.

Objectives

At the conclusion of this training, school leaders will be able to:

- Assess beginning-of-the-year goals set during summer professional development sessions
- Identify areas of progress and areas of continuous professional development in strategic thinking and interpersonal skills

Resources

Time: 40 minutes

Materials: Core Leadership Skills Reflection (1 per person); white board or flip chart; markers

Lesson Plan

1 Small Group Discussion – 20 MIN

- Instruct principals to all completed goal setting worksheets accessible from summer professional development sessions (Session 1 and Session 2).
- Have principals form small groups to discuss the goals they set at the beginning of the year. Post the following questions on a whiteboard or chart paper to guide discussion:
 - *What does progress look like for the goal set in the summer?*
 - *What unforeseen barriers or problems arose throughout the year?*
 - *How might you build upon or adjust the goal moving forward?*

2 Independent Activity – 20 MIN

Allow principals to complete the Core Leadership Skills Reflection worksheet, referring to the correlating worksheet from the summer session. Have them share this with a supervisor or peer.



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