

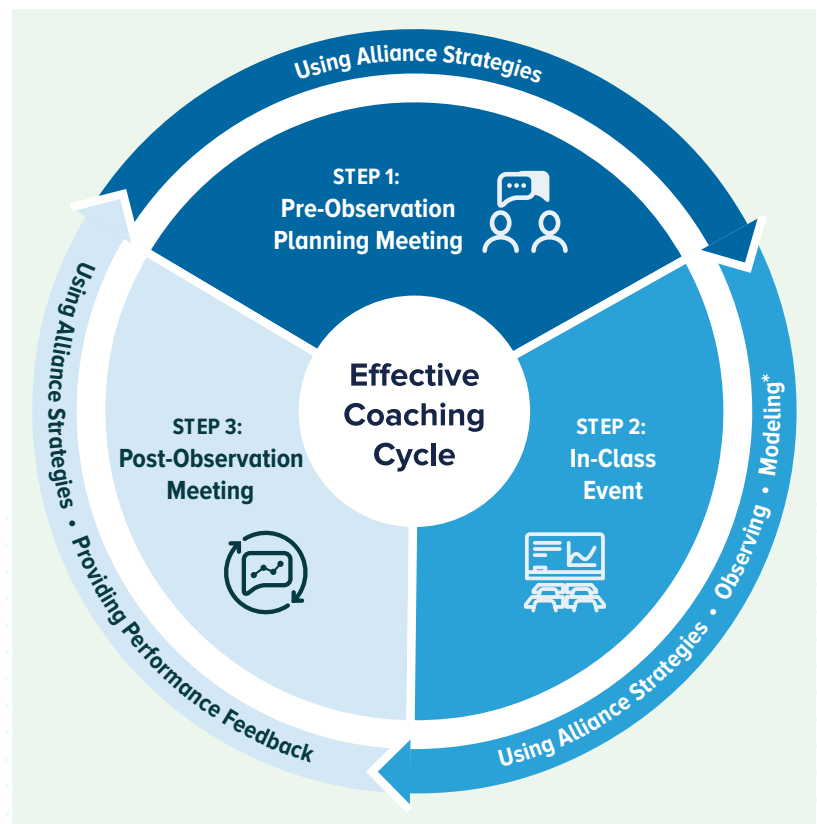
Effective Coaching of Teachers: Direct Observation Fidelity Tool

Purpose of the Tool

Instructional coaching is a collaborative process in which a coach works with a teacher through a recurring, job-embedded feedback cycle focused on strengthening the implementation of effective instructional strategies and ultimately improving student outcomes. As with all educational innovations, instructional coaching must be used with fidelity to achieve its intended outcome of strengthening teacher practice and improving student outcomes.

The tool can be used to help measure the fidelity of coaching practices—alliance strategies (also known as relationship-building strategies), observation, modeling, and performance feedback—across the three-step coaching cycle (see Figure 1). Just as coaches observe and collect data on teacher practice to provide performance feedback, the data collected in this tool are intended to support coaches to improve their practice, not to formally evaluate their practice. The tool is designed to help coaches reflect on their coaching, identify areas for improvement, and continually enhance the support they are providing to improve teaching and learning.

FIGURE 1: Effective Coaching Practices: Three-Step Process



* Modeling happens at coach's and teacher's discretion. It may not be necessary during each in-class event.

Image adapted with permission from Pierce & St. Martin, 2022

To learn more about the coaching cycle and effective coaching practices, view:

- [The Coaching Cycle: How Coaches Can Support Teachers and Improve Student Outcomes](#)
- [Defining Effective Coaching Practices to Support Teachers and Improve Student Outcomes](#)



Directions for Use

The tool has three parts, aligned to the steps of the coaching cycle and the coach's use of coaching practices:

- 1. Rating the Pre-Observation Planning Meeting:** Observer rates how the coach uses alliance strategies with the teacher and notes the focus and goals of the coaching.
- 2. Rating the In-Class Event:** Observer rates the coach's use of alliance strategies, observation, and modeling.
- 3. Rating the Post-Observation Meeting:** Observer rates the coach's use of alliance strategies and provides performance feedback.

The observer rates each coaching practice¹ on a scale from 1 to 5. The rubric includes examples of what performance looks like at levels 1, 3, and 5 to help make scoring clear and consistent. Ratings of 2 or 4 can be used when a coach's performance falls between these examples. Guiding questions are also included to help the observer gather useful details for giving feedback to the coach.

Before Using the Tool

The observer reviews the tool to become familiar with the structure and rating descriptions.

The observer talks with the coach and the teacher to explain:

- why data are being collected,
- how data will be collected, and
- how data will be used to continuously improve coaching.

After Completing the Tool

The observer summarizes the coach's ratings and provides feedback to the coach. As needed, the observer and coach determine if additional observations would be beneficial.

The tool refers to three distinct roles:



Observer: The person watching the coach working with a teacher and using the tool to rate coaching practices. The observer should be familiar with instructional coaching, including the effective coaching practices and coaching cycle.



Coach: The person being observed while coaching a teacher.



Teacher: The person being coached.

¹ While the effective coaching practices typically occur at specific points during the coaching cycle, there may be times when the coach uses a practice at a different point during the cycle. For example, the coach may model a practice or provide a video model of a practice during the planning meeting rather than modeling the practice during the in-class event. In this case, the observer should rate the use of the practice and make a note of when the practice occurred during the coaching cycle.

Background Information

Item	Response
Coach name	
Teacher name	
Observer name	
Dates of pre-observation planning meeting, in-class event, and post-observation feedback session	



Part 1: Rating the Pre-Observation Planning Meeting

The observer rates the coach's use of alliance strategies with the teacher and documents the teacher's goals for participating in coaching, the teaching practice that the teacher most wants feedback on, and the teacher's perspective about teaching and student learning.

Alliance strategies are strategies the coach uses to build a relationship with the teacher. These strategies include interpersonal skills, collaboration skills, and content expertise.

Examples of alliance strategies the coach may use during the pre-observation planning meeting include:

- restating and summarizing information conveyed by the teacher,
- asking open-ended questions,
- affirming difficulty of change,
- using nonevaluative language,
- referring to past accomplishments,
- identifying and working toward the teacher's goals and needs,
- communicating that improved teaching is about teamwork,
- conveying expertise in teaching and deep content knowledge, and
- explaining complex concepts succinctly.

RATINGS FOR COACHING PRACTICES: PRE-OBSERVATION MEETING

Coaching Practice	1	3	5	Rating Score
Alliance Strategies	The coach did not use alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) effectively to build a positive, supportive relationship with the teacher and was unable to clarify: - the goals and focus of the in-class event, and - the teacher's perspective on teaching and learning.	The coach used some alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise); however, their use was inconsistent, limiting the development of a positive relationship with the teacher. As a result, the coach was able to partially clarify: - the goals and focus of the in-class event, and - the teacher's perspective on teaching and learning.	The coach used alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) with sufficient duration and frequency to develop a positive and trusting relationship with the teacher and was able to clearly understand: - the goals and focus of the in-class event, and - the teacher's perspective on teaching and learning.	

OBSERVER'S NOTES FROM RATING THE PRE-OBSERVATION MEETING

Guiding Question	Response
What are the teacher's goals for participating in coaching?	
What are the practices that the teacher is interested in receiving feedback about during the in-class event?	
What is the teacher's perspective about teaching and student learning?	
Will the coach model the practice of interest during the in-class event?	
Is there any other relevant information from the pre-observation meeting that would be beneficial to document? For example, is this a new or existing partnership between the teacher and coach? How frequently does the coach observe the teacher?	



Part 2: Rating the In-Class Event

The observer rates how the coach uses alliance strategies, observes, and models (when appropriate) and takes any notes that will be helpful for providing feedback to the coach.

RATINGS FOR COACHING PRACTICES: IN-CLASS EVENT

Coaching Practice	1	3	5	Rating Score
Alliance Strategies	The coach did not use alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) effectively to build a positive, supportive relationship with the teacher.	The coach used some alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise); however, their use was inconsistent, limiting the development of a positive relationship with the teacher.	The coach used alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) with sufficient duration and frequency to develop a positive and trusting relationship with the teacher.	
Observation	The coach did not observe the teacher or the coach observed the teacher but did not collect data on the teacher's use of the practice of interest and students' response to the instruction.	The coach observed and collected some data on the teacher's use of the practice of interest and/or students' response to the instruction. However, the data collected provided an incomplete understanding of how the teacher implemented the practice.	The coach observed and collected data on the teachers' use of the practice of interest and students' response to the instruction. The data collected provided a clear understanding of how the teacher implemented the practice.	
Modeling <i>Note: Only rate this practice if modeling was needed.</i>	The coach did not model or the coach modeled an unrelated practice, modeled a practice inaccurately, or did not sufficiently model the practice to allow the teacher to correctly replicate the practice.	The coach modeled the identified practice so that the teacher was able to partially replicate the practice (i.e., replicate elements of the practice but not the full practice).	The coach modeled the identified practice so that the teacher was able to correctly replicate the entire practice.	

OBSERVER'S NOTES FROM IN-CLASS EVENT

Guiding Question	Response
For how many minutes did the coach observe the teacher?	
Was modeling necessary? If so, when did it occur (e.g., coach modeled practice during the in-class event, coach modeled practice during the pre-observation meeting, coach provided a video model of the practice)?	
Were there instances in which the coach should have modeled a practice but did not? If so, document the number of times that this occurred.	
Is there any other information about the in-class event that would be beneficial to document?	



Part 3: Rating the Post-Observation Meeting

The observer rates the coach's use of performance feedback and alliance strategies and takes any notes that will be helpful for providing feedback to the coach.

The observer should consider whether the feedback is high quality. High-quality feedback is:

- specific to the practice of interest (i.e., based on the data collected about the teacher's practice and students' response)
- grounded in research
- more positive than corrective, with at least a 4:1 ratio of positive to corrective feedback statements, and
- provided in a timely manner

RATINGS FOR COACHING PRACTICES: POST-OBSERVATION MEETING

Coaching Practice	1	3	5	Rating Score
Alliance Strategies	The coach did not use alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) effectively to build a positive, supportive relationship with the teacher.	The coach used some alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise); however, their use was inconsistent, limiting the development of a positive relationship with the teacher.	The coach used alliance strategies (e.g., interpersonal skills, collaborative skills, content expertise) with sufficient duration and frequency to develop a positive and trusting relationship with the teacher.	
Performance Feedback	The coach did not provide performance feedback or the feedback provided did not meet the characteristics of high-quality feedback (i.e., timely, specific, research-based, and more positive than corrective).	The coach provided performance feedback that partially met the characteristics of high-quality feedback (i.e., timely, specific, research-based, and more positive than corrective).	The coach provided high-quality feedback that was timely, specific, research-based, and more positive than corrective.	

OBSERVER'S NOTES FROM THE POST-OBSERVATION MEETING

Guiding Question	Response
How was feedback provided (e.g., verbal, anecdotal note, graphical)?	
How many performance feedback statements did the coach provide to the teacher? How many were positive and how many were corrective?	
If not provided during the post-observation meeting, when was the feedback from the coach to the teacher provided (e.g., during the next pre-observation meeting and/or in the moment of teaching)?	
Is there any other relevant information about the post-observation meeting that that would be beneficial to document?	

Summary of Ratings & Reflection

The observer uses the table below to summarize the ratings of each of the coaching practices. After completing the summary of ratings, the observer and coach meet to reflect on coaching and determine the next steps. The observer uses the discussion prompts to guide the conversation with the coach and encourage coach self-reflection.

SUMMARY OF RATINGS FOR COACHING PRACTICES

Coaching Practice	Pre-Observation Meeting	In-Class Event	Post-Observation Meeting
Alliance Strategies			
Observation			
Modeling			
Performance Feedback			

DISCUSSION PROMPTS

Based on the data collected from this tool and coaching impressions:

- How did the coaching cycle go?
- What did the coach do that was most/least effective during the coaching cycle?
- To what degree did coaching achieve its intended goal(s)?
- What are some next steps for enhancing coaching?
- What questions remain?

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This document is an updated version of NCSI's Coaching Fidelity Tool Rubric (Pierce & Ferguson, 2018) and Coaching Fidelity Tool Worksheet (Pierce & Ferguson, 2018).