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# INSTRUCTIONAL COACHING TOOLKIT

**Forms, Cycles & Conversation Guides**

**-- FULL YEAR RESOURCE --**

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A comprehensive instructional coaching resource for coaches, department leads, and administrators -- featuring 12 editable forms, coaching cycle templates, conversation protocol guides, and reflection tools for a full year of impactful coaching.

- 12 Editable Coaching Forms --
- Coaching Cycle Overview Poster --
- 3 Conversation Protocol Guides --
  - Goal-Tracking Template --
- Annual Coaching Reflection Log --
- Coach Self-Assessment --

## **UM Printables**

Premium Educational Resources for Educators

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**Review Request** -- Share your feedback and help improve this resource

## About This Resource

All forms in this toolkit are designed to be editable and adaptable to your specific coaching context. Edit in Google Docs or Microsoft Word, print for handwritten use, or complete digitally. Each form includes guidance notes to support effective implementation. Forms are designed for grades K-12 and can be customized for any subject area or coaching model.

**PRO TIP:** Looking for the editable versions? This PDF companion includes digital versions of all 12 forms. Visit your download page to access the Google Docs and Microsoft Word versions.

# THE INSTRUCTIONAL COACHING CYCLE

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The instructional coaching cycle is a structured, iterative process that guides coaches and teachers through a partnership designed to improve student learning. Each cycle follows a clear progression from identification through implementation to reflection, ensuring that coaching remains goal-directed and evidence-based.



This cycle repeats throughout the year, with each iteration building on previous learning. Multiple cycles may run concurrently with different teachers, and individual cycles may vary in length from 2-6 weeks depending on the complexity of the goal.

# COACHING CYCLE: KEY PRINCIPLES

**Partnership, Not Evaluation** -- Coaching is a non-evaluative, confidential partnership focused on professional growth. The coach supports the teacher in self-directed learning, never judging or evaluating performance.

**Student-Centered Goals** -- Every coaching cycle begins and ends with student learning. Goals are tied to student achievement data, and success is measured by the impact on students, not just teacher behavior change.

**Evidence-Based Practice** -- Decisions within the coaching cycle are grounded in classroom data and observation evidence. Coaches help teachers collect and analyze data to inform instructional choices.

**Teacher Agency & Voice** -- Teachers drive the coaching process. They identify their own goals, choose strategies to explore, and determine the pace of implementation. The coach facilitates, not directs.

**Confidentiality & Trust** -- What happens in coaching stays in coaching. This foundation of trust allows teachers to be vulnerable about challenges and open to taking instructional risks.

**Continuous Improvement** -- Coaching is iterative. Reflection leads to new goals, and each cycle builds on the last. There is no 'finish line' -- only ongoing growth and refinement.

## SUGGESTED ANNUAL TIMELINE

| Timeframe | Coaching Focus                             | Key Activities                                                                          |
|-----------|--------------------------------------------|-----------------------------------------------------------------------------------------|
| Aug - Sep | Building Relationships & Identifying Goals | Intro meetings, interest surveys, goal-setting conferences, baseline data review        |
| Oct - Nov | First Coaching Cycles Begin                | Pre-observations, classroom visits, co-planning, strategy modeling, initial reflections |
| Dec - Jan | Mid-Year Reflection & Cycle Refinement     | Mid-year check-ins, goal progress review, cycle adjustments, new goal identification    |
| Feb - Mar | Deepening Practice & New Cycles            | Advanced strategy work, co-teaching, peer observation, student evidence analysis        |
| Apr - May | Reflection, Celebration & Planning Ahead   | Annual reflection logs, goal summation, celebration of growth, next-year planning       |

**PRO TIP:** Adapt this timeline to your school calendar. Some coaches run 3-week sprint cycles, while others prefer 6-week deep-dive cycles. The key is maintaining the Identify-Learn-Implement-Reflect rhythm consistently.

# PRE-OBSERVATION CONFERENCE FORM

Complete this form together during the pre-observation conference. The teacher and coach should collaborate to identify the observation focus and specific look-fors. This is a non-evaluative, planning conversation.

|                     |                     |                    |
|---------------------|---------------------|--------------------|
| Teacher Name        | Grade / Subject     | Date of Conference |
| Date of Observation | Time of Observation | Coach Name         |

## LESSON CONTEXT

Lesson Topic / Unit:

Lesson Objective(s):

Standards Addressed:

## OBSERVATION FOCUS

What specific instructional practice or focus area does the teacher want the coach to observe?

Primary Focus Area:

### Select Focus Domain

☐ Classroom Environment

☐ Lesson Structure & Pacing

☐ Questioning Techniques

☐ Student Engagement

☐ Differentiation

☐ Formative Assessment

☐ Instructional Clarity

☐ Feedback to Students

☐ Grouping Strategies

☐ Other: \_\_\_\_\_

## SPECIFIC LOOK-FORS

What exactly should the coach be watching for? Be as specific as possible to ensure the observation yields useful data.

**Teacher Actions (What should I see the teacher doing?)**

**Student Actions (What should I see students doing?)**

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## TEACHER QUESTIONS & CONCERNS

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What questions or concerns does the teacher have about this lesson or the focus area?

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## COACH NOTES

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Notes from pre-conference (strategies discussed, resources shared, agreed-upon next steps):

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### CONFIDENTIALITY REMINDER

All information shared during the pre-observation conference is confidential and part of a non-evaluative coaching partnership. This form is for the coach and teacher only and will not be shared with administration.

Use this form during the classroom observation to record objective, non-evaluative evidence. Focus on what the teacher and students say and do. Avoid judgmental language; use quotes whenever possible.

|              |                 |                    |
|--------------|-----------------|--------------------|
| Teacher Name | Date            | Time In / Time Out |
| Observer     | Grade / Subject | Observation Focus  |

## EVIDENCE COLLECTION

Record timestamped, objective observations in the grid below. Capture teacher actions, student responses, and instructional moves.

| TIME  | TEACHER ACTIONS / EVIDENCE | STUDENT ACTIONS / EVIDENCE |
|-------|----------------------------|----------------------------|
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |
| _____ |                            |                            |

## OBSERVATION SUMMARY

After the observation, summarize the key evidence related to the teacher's focus area. Keep it descriptive and evidence-based.

**Strengths Observed (Aligned to Focus Area):**

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**Areas for Growth (Aligned to Focus Area):**

Use this template to monitor progress toward the SMART goal established during the Goal-Setting Conference (Form 4). Update it at each coaching check-in to document evidence of growth and any necessary adjustments.

Teacher Name

Coach Name

Academic Year

SMART Goal Statement:

Baseline Data / Score

Target Data / Score

Target Date

## PROGRESS MONITORING LOG

Record evidence of progress at each check-in. Focus on student learning data, not just teacher compliance with the strategy.

| CHECK-IN DATE | EVIDENCE / DATA COLLECTED | COACH OBSERVATIONS | ADJUSTMENTS NEEDED? |
|---------------|---------------------------|--------------------|---------------------|
|               |                           |                    |                     |
|               |                           |                    |                     |
|               |                           |                    |                     |
|               |                           |                    |                     |
|               |                           |                    |                     |
|               |                           |                    |                     |

## FINAL GOAL EVALUATION

Complete this section at the end of the coaching cycle to evaluate whether the SMART goal was met.

Final Student Data / Score:

Final Score / Outcome:

Date Achieved:

Was the SMART goal met? ☐ Yes, fully met ☐ Partially met ☐ Not yet met

Evidence of Impact on Student Learning:

# COACH SELF-ASSESSMENT

This comprehensive self-evaluation tool is designed for instructional coaches to reflect on their own practice. Use this assessment at the end of a coaching cycle, semester, or year to identify areas of strength and areas for professional growth.

Coach Name

Date

School / District

## COACHING COMPETENCIES RATING

Rate your current proficiency in each competency area using the following scale: 1 = Beginning, 2 = Emerging, 3 = Developing, 4 = Proficient, 5 = Exemplary. Be honest and reflective.

|                                                                                              |             |            |              |              |             |
|----------------------------------------------------------------------------------------------|-------------|------------|--------------|--------------|-------------|
| <b>Building Trust &amp; Relationships<br/>(Confidentiality, respect, rapport)</b>            | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Active Listening &amp; Empathy<br/>(Seeking to understand, withholding judgment)</b>      | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Questioning &amp; Facilitation<br/>(Probing, paraphrasing, mediating thinking)</b>        | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Instructional Knowledge &amp; Modeling<br/>(High-impact strategies, demonstrating)</b>    | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Co-Planning &amp; Co-Teaching<br/>(Collaborative design, shared instruction)</b>          | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Data &amp; Evidence Collection<br/>(Objective observation, student evidence)</b>          | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Goal Setting &amp; Cycle Management<br/>(SMART goals, tracking, pacing)</b>               | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Providing Constructive Feedback<br/>(Specific, timely, strengths-based)</b>               | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Navigating Difficult Conversations<br/>(Professional courage, empathy)</b>                | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Cultural Responsiveness &amp; Equity<br/>(Inclusive practices, diverse perspectives)</b>  | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Reflective Practice &amp; Continuous Learning<br/>(Self-assessment, seeking feedback)</b> | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |
| <b>Professionalism &amp; Ethics<br/>(Boundaries, integrity, advocacy)</b>                    | 1 Beginning | 2 Emerging | 3 Developing | 4 Proficient | 5 Exemplary |

## REFLECTION ON STRENGTHS & GROWTH

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1. What are your greatest strengths as an instructional coach? Provide evidence.

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2. What areas of your coaching practice do you want to develop further?

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3. What specific actions will you take to grow in these areas?

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4. How will you hold yourself accountable for your professional growth?

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### GROWTH MINDSET FOR COACHES

The most effective coaches view their own practice through a lens of continuous improvement. If you rated yourself low in any area, that is not a deficit -- it is a clear roadmap for your own professional development. Consider finding a coaching mentor or peer to support your growth.

# THANK YOU!

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Thank you for purchasing and using the **Instructional Coaching Toolkit: Forms, Cycles & Conversation Guides**. I am deeply committed to creating high-quality, practical resources that make a real difference in the daily work of educators.

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