Virtual Coaching Framework

The Virtual Coaching Framework is a set of recommendations and guidelines for optimal use of web-based conferencing as a substitute for face-to-face coaching services. The guidelines are based on a published study with a school-based instructional improvement model, but have been adapted in this framework for generic application to any organizational context requiring leadership coaching or external assistance.

The original study was conducted by Pearson researchers, Brad Ermeling, Tim Tatsui, and Kelly Young. The full peer-reviewed scientific journal article was published in Teachers College Record and is available from the Pearson Research and Innovation Network website.


Key Terms

**External assistance**
Any organization or entity from the outside that is working to create and sustain conditions and capacity for improvement.

**Coach**
Individual from the outside who works with local leaders to support, improve, and sustain implementation.

**Virtual coaching**
Remote assistance provided via computers or over the internet.

**Media naturalness**
The degree to which a communication medium simulates face-to-face communication.

“A decrease in the degree of naturalness of a communication medium leads to the following effects in connection with a communication interaction: (1) an increase in cognitive effort, (2) an increase in communication ambiguity, and (3) a decrease in physiological arousal” (Kock, 2005, p. 124).
When Should this Framework Be Used?

- For products or services that have identified a need for leadership coaching/external assistance, either as a substitute for face-to-face services, or as a new value-added component where coaching and assistance were not previously possible.
- **Important:** For support of well-established products or services with a clearly specified program or model that can be dependably replicated and tailored for local implementation efforts. The Ermeling et al. study specifically reported on the virtual coaching of site-based leadership teams already equipped with a fully established local implementation model. The missing element was the affordable, high quality coaching to launch, sustain and guide implementation over time.

What are the Prerequisite Conditions?

- Requires local leader(s) with capacity to engage in a virtual coaching relationship.
  - Comfortable with technology
  - Reliable with communication over email
  - Willing to invest time and energy in being mentored by an external coach
- Requires basic technology specifications for video conferencing
  - Determine which conferencing interface offers best value and functionality to meet project needs (e.g., Adobe Connect Pro, Google Hangouts, Skype, WebEx, etc.).
  - Consider pricing, screen-sharing functionality, efficiency of group conferencing with multiple videos, or other specific project requirements.
- Requires a stable high-speed internet connection with sufficient bandwidth for streaming video.
- Group coaching contexts (situated in co-located setting) require a high-quality speakerphone or computer-aided audio solution designed for web-conferencing.
  - Test-out room configuration and phone placement, verify length of all electric and audio cords, and make sure all members in the room can view both the phone and screen while facing the same direction (see optimal u-shaped configuration in Figures 1 versus problematic configuration in Figure 2).
  - Test sound quality under authentic conditions of a large group discussion and verify that sound is clear on both ends (place conference phone in middle of u-shaped meeting space).
Figure 1. Example of Optimal Room Configuration

Figure 2. Example of Problematic Room Configuration

What are the Benefits of Virtual Coaching?

- Enables substantial cost savings (as much as 50% reduction in overhead) in comparison to face-to-face services while also maintaining fidelity of program implementation.
  - Elimination of travel expenses
○ Elimination of coach’s time spent on travel
○ Elimination of “cushion time” needed for arrival prior to meetings
○ Reduction in time required for coach’s “set-up” and “take-down” before and after meetings
○ Reduction in time required for preparing materials (more reliance on electronic formats which are easier to reproduce, adapt, and reuse for multiple contexts)

● Expands the flexibility of how personnel are selected and deployed, increasing the possibility of access to high-quality experts regardless of geographic location. This eliminates a problem documented in many isolated regions, where a small contingent of under-qualified local consultants perpetually rotate through the system working as independent contractors for different reform organizations.

● Enables more flexible scheduling of settings for individual coaching sessions which can take place before, during, or after normal business hours, without respect to location.

● Increases quality and intensity of assistance by maximizing the frequency of contact points (e.g., multiple one-hour coaching sessions rather than extended site visits) without the limitations of travel and scheduling typically encountered in face-to-face models.

● Serves as a catalyst to expand and accelerate growth and capacity of site-based leaders.

○ For group coaching contexts, the coach’s physical absence in team meetings necessitates a substantial shift in the site leader’s role. The coach is still virtually present, providing assistance, teaching, and support through the software interface, but the site-based leader can no longer defer to the coach as the lead facilitator for the meeting. Rather than taking a “back seat,” the virtual coaching framework places the site leader in the driver’s seat with a mentor on standby who is ready to assist and steady the wheel.

○ As observed in videos and documented in the coach’s field notes from the Ermeling et al. study, site leaders’ expanded responsibilities and growth in leadership capacity included:
  - Preparing the setting
  - Reading the room
  - Checking for understanding
  - Attending to nonverbal cues
  - Facilitating discussion
  - Charting ideas
What are the Optimal Use Cases?

- Research showed best results with hybrid design.
  - Initial face-to-face launch and perhaps one mid-year visit (if economical)
  - Monthly, biweekly, or weekly virtual support through web-based conferencing
- Research showed strongest results and media naturalness with individual leadership coaching.
  - One-to-one video-conference with minimal loss of a naturalness in comparison to face-to-face coaching
  - Ease of access to digital resources for seamless exchange and mutual screen-sharing between two individuals
  - Excellent sound quality and limited problems with streaming bandwidth
- Research showed positive results with co-located leadership teams/workgroups but with limitations in media naturalness.
  - Using individual computers and audio lines for group members in a co-located setting can create sound interference, so a central speaker phone or computer is the ideal option (see u-shaped diagram in Figure 1).
  - Each team member should have a webcam-enabled laptop so the coach can see faces and discern which members are speaking. The audio on each computer should be placed on mute and the volume should be turned down.
  - Group members can hear the coach, but coach cannot always hear group members depending on distance from central speaker phone or computer. Group members should be reminded to speak loudly and should avoid talking over each other or engaging in side-bar discussions.
  - During segments of meetings that involve individual work or pair work, the coach is unable to circulate and answer questions or privately interact with group members as he/she would in a face-to-face context. Using the central phone line for individual conversation is disruptive to the rest of the group who are not involved in the discussion. Some possible solutions for simulating these private interactions include:
    - Using a cell phone or mobile device and a free service such as Skype to privately connect with the coach while stepping out to the hallway or an adjacent meeting space.
- Turning off the speaker phone and picking up the receiver to engage in a private conversation with the coach. The downside of this approach is that the rest of the group can still hear the team members’ side of the conversation.
- A third option is to use a private chat-box in the web-based interface, although studies show that text-based interactions result in a significant decrease in both efficiency and media naturalness when compared to audio and video communication.

**Note:** The Ermeling et al. study did not investigate the use case of co-located team members meeting in separate rooms with individual computer mics enabled.
- This would improve the audibility of individual members but would eliminate the benefits of face-to-face interactions and further decrease media naturalness for co-located members.
- For contexts that involve a site-based leader who co-leads the setting along with the remote coach, this format might also restrict the local site leader's presence and facilitative capacity, otherwise afforded by central conference line and shared meeting space.

**What are the Key Recommendation for Frequency and Type of Assistance?**
- The guiding principle for designing the pattern of assistance is to maximize the frequency of contact points. More contact points enable more feedback loops, which enhances leadership capacity and improves timely responsiveness to implementation needs.
  - The Ermeling et al. study showed substantial benefits of scheduling two shorter monthly coaching sessions with school leaders (approximately 45-60 minutes each) as opposed to one longer monthly session for 90-120 minutes.
  - As highlighted previously, this is one of the distinct benefits of the virtual coaching framework which enables the scheduling of more frequent contact points without the limitations of travel and scheduling typically encountered in face-to-face models.
- Coaches should work to establish a regular schedule of settings at the beginning of the project rather than using an *ad hoc* model or scheduling meetings month-by-month. The mutual commitment to stable, non-negotiable settings is an important research finding in successful coaching models.
When coaching teams or workgroups that also have a site-based leader, the virtual assistance model should include a system of cascading settings where the coach meets regularly for a planning meeting with the site leader prior to a corresponding meeting with the larger team. See Figure 3 for an example assistance design from the school-based instructional improvement model documented in the Ermeling et al. study.

- The planning meeting typically involves (a) debriefing implementation progress, (b) preparing for upcoming meetings, and (c) strategizing on specific personnel or implementation needs.
- A key finding of the Ermeling et al. study showed that these planning meetings should also include a "dry-run" of the upcoming team meeting, where the coach assists the site leader to practice his or her role for the meeting, rehearse the sequence of activities, anticipate questions or obstacles, and solidify key talking points. Evidence from the Ermeling et al., including unanimous feedback from site leaders, pointed to the dry-run as a pivotal factor in accelerating growth in leadership capacity.

*Figure 3.* Example assistance design for school-based instructional improvement (Ermeling et al., 2015).
What Training Should Be Provided at the Outset?

- For group contexts, the first team meeting at each school should begin with a training module on guidelines and procedures for productive virtual meetings including the following:
  - Learning to log-in and access the web-based software
  - Finalizing room configuration and phone placement
  - Adjusting laptop camera angles
  - Practicing procedures for announcing who is speaking and learning to project voices with appropriate volume
  - Learning procedures for private conferencing during “work sessions”
  - Practicing use of interactive software features and establishing expectations and procedures for web-based sharing of work products and agendas

- The first planning meeting with the site leader should involve a dry-run of the room configuration and technological set-up, as well as a rehearsal of content outlined above in preparation for the first team meeting.

References