

# **Observation Checklist for High-Quality Professional Development—Version 3.2**

## **(HQPD Checklist)**

### **Guidance Document**

The *Observation Checklist for High-Quality Professional Development—Version 3.2 (HQPD Checklist)* was designed to be completed by an observer to determine the inclusion of evidence-based adult learning indicators within professional development. These data should be incorporated into ongoing feedback and coaching to the individuals who provide professional development. Furthermore, the indicators, and associated examples can be used as guidance when designing or revising professional development. The tool represents a compilation of indicators that promote learning and implementation of evidence-based practices. These indicators were identified through a review of relevant research and more than fifteen years of experience evaluating professional development.

<b>Preparing for Learning</b>
<b>1. Prior to the professional development, provides learning objectives addressing the critical training concepts.</b>
Examples: Learning objectives are provided in the event description on a registration website. Participants are emailed learning objectives along with logistics for the training. Learning objectives are included on an agenda sent to participants prior to the training.
<b>2. Prepares participants to engage in the content by assigning activities in advance.</b>
Examples: Participants are asked to read a provided article and be prepared to discuss it during the training. Participants complete a set of pretraining modules prior to attending the session; these ensure that all participants have a common base of knowledge. Prior to the session, participants are asked to reflect on and rate their current practice using a rubric based on key concepts that will be addressed during the training. Participants complete a pretest that prompts them to reflect on the knowledge and skills they hope to gain. Participants are asked to complete a pretest that provides links to resources to expand their background knowledge.
<b>3. Follows an agenda that outlines the flow of the content and includes beginning times, ending times, and key breaks.</b>
Examples: The presenter follows an agenda displayed in the presentation that includes topics to be addressed related to learning objectives and a timeline of topics and breaks. A detailed agenda is provided on the registration website, and adjustments are made and communicated throughout the day to better meet participants' learning needs. The agenda, with topics to be addressed and break times, is included in the packet of materials. The registration for a series of online webinars includes a list of topics to be covered across the series and subtopics to be addressed during each of the four one-hour sessions.
<b>4. Establishes credibility by communicating content expertise and/or experience.</b>
Examples: The presenter's background and expertise are summarized on the registration website. The presenter describes how they became interested in the topic and how it changed their practice and led to improved outcomes. The event organizer's introduction includes a description of the presenter's expertise related to the content.

## Contextualizing the Content

### 5. Illustrates alignment between the content and participants' organizational standards, goals, or priorities.

Examples:

- The presenter prompts local teams to identify connections between the content and their local initiatives or improvement plans.
- The presenter describes how the intervention aligns with federal/state policy or law (e.g., state agency goals, accreditation requirements, the Elementary and Secondary Education Act), showing how the content helps participants meet their existing professional responsibilities.
- The presenter notes that the practices have been adopted by relevant national- or state-level professional organizations, highlighting how the practices are within the scope of the participants' professional role.

### 6. Summarizes the evidence base for the content, including providing references or links.

Examples:

- The presenter provides a list of references supporting the evidence-based practices that are discussed. References to research cited in the presentation are included in the materials for the session.
- During the session, the presenter refers to key researchers, details their contributions to the training content, and includes links to their materials.
- During the training, the presenter refers to a research meta-analysis provided as a prereading activity.

### 7. Emphasizes the impact of the practice/content on improved outcomes (e.g., student achievement, client well-being).

Examples:

- The presenter provides evidence demonstrating that the intervention positively impacts in-school or postsecondary outcomes for students.
- The presenter discusses results for individual children prior to and after the intervention.
- The presenter discusses evidence, following implementation of the new practice, linking staff well-being to improved outcomes for students.
- Participants read and discuss synopses of research outlining outcomes for youth.

### 8. Provides model examples of the content in practice, connected to participants' context.

Examples:

- The presenter provides video examples of the content being used by teachers across different grade levels.
- The presenter provides hands-on demonstrations and illustrates how to use new technological tools in different ways, depending on participants' roles.
- Each participant chooses a case study from a selection representing a variety of relevant contexts, then discusses the implementation strengths and outcomes identified within the case study.

## Engaging in Learning

### 9. Builds on or relates to participants' prior learning.

Examples:

- The presenter describes how the content is an extension of participants' existing knowledge/skills.
- The presenter refers to content provided in previous trainings within a sequence.
- The presenter prompts participants to compare and contrast critical concepts to common practices within their field(s).

### 10. Engages participants in higher-order thinking to learn each critical concept.

Examples:

- Using descriptive indicators of the content/practice, participants compare and contrast these indicators to their current practices.
- Participants analyze a video example of an individual implementing the practice and then discuss strengths and weaknesses of the implementation.
- Participants work together to formulate definitions of intervention components, then compare their definitions to those of an expert in the content.

The presenter facilitates participants' analysis of the critical concepts by using a graphic organizer to create a logic model of the key elements.

**11. Prompts each participant to relate the content to their context.**

Examples:

The presenter promotes buy-in by prompting individual responses to "I think this practice would benefit my students because ..." and "A challenge that I anticipate is ..." Individuals then share their responses in groups.

Participants work together in small groups to strategize ways to overcome barriers to implementation, then share their ideas with the whole group.

To create a personal connection to content, each participant shares out modifications that they would make to customize the practices while maintaining fidelity.

Participants work individually to revise an instructional plan for a student using the critical concepts, then share with their team prior to the next session in the online series.

**12. Facilitates opportunities for participants to collaborate related to the critical concepts.**

Examples:

Each participant observes and analyzes a video example related to the content and discusses the findings in pairs or small groups.

With partners, participants role-play each of the practices being taught and reflect together on insights.

Through virtual discussion boards or breakout rooms, participants build on each other's ideas regarding the implementation of critical training concepts.

Participants have opportunities, following each learning objective covered throughout the day, to process the information in teams.

During a webinar series, local teams work together to complete application assignments between each meeting.

**13. Facilitates opportunities for each participant to practice applying the critical concepts.**

Examples:

After receiving training on how to complete an observation, participants practice completing the observation using a video example.

The presenter has participants establish teams and practice a mock lesson using a newly learned instructional strategy.

After reviewing a data analysis skill, participants practice analyzing various graphs of data to identify areas of needed support.

After learning a coaching skill, triads practice, with one person acting as the coach, one acting as the coaching recipient, and one observing and providing feedback, switching roles throughout the practice opportunities.

Each participant modifies a lesson plan to incorporate the newly learned concepts.

Using a case study, each participant determines the best course of action as outlined in a decision tree.

**Reflecting on Learning**

**14. Provides constructive feedback within practice opportunities to promote the acquisition of skills.**

Examples:

After receiving training on how to complete an observation, participants practice completing the observation using a video example and receive corrective feedback.

The presenter has participants establish teams and practice a mock lesson using a newly learned instructional strategy, providing constructive feedback using an implementation checklist.

Participants practice analyzing various graphs of data and compare their analysis to an expert model, with the presenter providing further instruction regarding discrepancies.

Triads practice coaching skills, with one person acting as the coach, one acting as the coaching recipient, and one observing and providing feedback based on a checklist of coaching behaviors.

Each participant briefly describes their lesson plan modifications, receiving feedback from the presenter.

After each participant determines the best course of action in a case study, the presenter provides the best answer with justification, answering questions from participants.

**15. Engages each participant in assessment of knowledge/skill acquisition with corrective feedback.**

Examples:

The learning targets are used as a quiz with open-ended answers. Participants answer each question, and then the presenter displays and discusses the correct answers with the whole group, correcting any misconceptions.

Each participant demonstrates the use of specific procedures and receives feedback from an expert based on how to correctly complete the process.

Each participant completes a posttest and receives correct answers with a justification of why each answer is correct.

Each participant analyzes a lesson plan based on an implementation rubric and then compares the analysis to an expert model.

**16. Facilitates opportunities for participants to reflect on their current practice and the influence of new learning on their future practice.**

Examples:

In a worksheet, participants describe their current practices and the changes they will make to these practices based on training content.

After participants identify the new skills they have developed or refined, they edit one of their existing lesson plans to include these elements.

After participants identify new procedures for analyzing graphs to monitor progress, they edit their existing protocols to include these steps.

**17. Establishes a process for participants' continued reflection on implementation and impact.**

Examples:

Expectations for a follow-up session include presentations by each participant in which they describe the implementation of each component of the practice and the results.

Through a discussion forum, participants describe the strengths of their instruction based on a practice profile, areas they plan to improve in the future, and the impact on student engagement.

Each participant's action plan includes a timeline for self-assessment and reflection on success in meeting indicators of effectiveness.

Teams establish a process for obtaining and analyzing fidelity and outcome data as well as determining adjustments based on the data.

**Transferring Learning to Practice**

**18. Outlines criteria that illustrate a successful transfer of the critical concepts to practice.**

Examples:

The presenter reviews an implementation checklist that details observable behaviors indicating successful practice.

Participants analyze the steps of a flowchart that outlines the sequence and decision-making points to complete a process.

The presenter reviews the practice profile rubric to be used to determine fidelity.

Participants work in teams to describe how sections of the implementation checklist might appear during instruction and engage in whole-group discussion.

The presenter reviews the implementation playbook that includes a list of the key components and descriptions as well as a checklist of the essential components of the strategy.

**19. Ensures that participants leave with detailed action steps to apply their learning.**

Examples:

Participating teams complete action plans that are shared with the trainer; plans include details on activities, timeline, resources required, and individuals responsible.

Individuals leave the training with due dates for implementing each component of the newly learned practice and a plan to reconvene after each due date to reflect on implementation and outcomes. Interdisciplinary teams develop a strategy, including the timeline and process, to provide ongoing professional development across all school staff on the instructional strategies that were covered during the training.

**20. Provides resources and technical assistance for continued learning.**

Examples:

The presenter describes future trainings that directly build on the content from the current training.  
The presenter shows participants where to find additional materials on the project website to support the learning objectives.  
The presenter provides a link to online modules for more in-depth training on aspects of the content covered.

**21. Establishes ongoing two-way communication (coaching) to improve the implementation fidelity of critical concepts.**

Examples:

Project coaches schedule times with each participant to provide follow-up in-person and/or online support to increase fidelity in implementing the practice(s).  
The presenter provides monthly two-hour webinars to discuss barriers, strategize solutions, and share observed benefits of participation.  
Participating district teams plan three follow-up meetings to review videos of their own classrooms, based on a performance rubric, and provide additional support to each other on how to continually refine implementation of the practices.  
The presenter facilitates the selection of accountability partners (peer coaches) in which partners set multiple meeting times to discuss implementation and brainstorm solutions to challenges.  
Project coaches offer support to district-level instructional coaches, who are tasked with providing ongoing, in-district coaching around the content.

**Citation**

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**Authors' Note**

The developers have observed more than 500 professional development sessions, including face-to-face, virtual, and hybrid instructional formats. Group events (e.g. workshops, seminars, conferences, webinars) continue to be the most common form of professional development because they are “the most efficient and cost-effective professional development model for sharing ideas and information with large groups” (Guskey, 2000, p. 23). This checklist was originally designed to improve and evaluate the quality of single-event training but has since been applied to mentoring models, multiweek courses, webinar series, book studies, etc.

**Resources**

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