FROM MAVERICK TO MAINSTREAM:

Takeaways from the 2017 Blended and Personalized Learning Conference

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In this report, we share seven key tips that emerged from leading innovators.

INTRODUCTION

In its sixth year, the Blended and Personalized Learning Conference (BPLC) hosted by the Highlander Institute, The Learning Accelerator, and the Christensen Institute brought together more than a thousand educators from around the country to share, discuss, and define innovative education practices. In tandem, we hosted an invitation-only Summit on March 31, 2017—a day-long conversation among leading district, school, and classroom implementers from across the country. Nearly 70 schools and districts applied to attend the Summit through the Christensen Institute's online Blended Learning Universe (BLU) by creating or updating a profile detailing their current blended-learning efforts. From there, we selected applicants who were demonstrating leadership across key focus areas such as competency-based learning, school redesign and taking strategies to scale, among others. Ultimately, a diverse group of more than 100 education leaders converged in Providence, Rhode Island, to share their best strategies for refining and enriching innovative practices of student-centered teaching and learning.

Going into the event, our hope was to allow these leaders to both share and learn from one another. As organizers, we also wanted to capture their most profound lessons to inform others who are pursuing blended and personalized learning. As Rhode Island Education Commissioner Ken Wagner stated in his opening remarks, the challenge facing today's education system is taking this work from "maverick to mainstream."

Throughout the day, conversations focused on forwarding so-called maverick as well as mainstream aims—that is, taking existing innovative approaches to the next level and taking innovative approaches to scale. In this report, we share seven key tips that emerged from leading innovators.

FROM THE MAVERICKS: PUSHING THE INNOVATION ENVELOPE

#1 Modify models to expand relationships and collaboration

Summit participants by and large expressed confidence using blended learning. With sound processes for a blended-learning environment in place, most of the leaders are now in the process of innovating on top of established practices to improve and deepen students' experiences.

For many, this has meant taking steps to further enhance their models in order to double down on teacher-student relationships. "Before going blended, I never knew my students," said one elementary school teacher in California. "Now, the small-group time makes all the difference." Similarly, another educator described how her school adopted a Station Rotation model in an effort to zero-in on interpersonal relationships. "For us, the most important thing is increasing the amount of time students spend face-to-face with teachers," she said. "Before shifting to blended learning, our culture/climate survey score for 'I have one person in the building who cares about me' was 20%. Now after shifting to blended learning, it's up to 70%." Brooklyn LAB Charter School in New York likewise tries to foster stronger relationships between students and adults as a critical lever for personalization, including by breaking up students' learning time into small-group instruction, co-teaching, or one-on-one check-ins. Brooklyn LAB's Eric Tucker noted that to be most effective, blended approaches should keep an eye on the learning context (e.g., group size and purpose) and the focus (e.g., recuperation, acceleration, application).

Focusing on deeper relationships, however, is not always easy alongside other instructional shifts. Jonathan Hanover of Roots Elementary in Colorado described how his school has wrestled with balancing personalization with the communal experience of

school. The school's original instructional model included four academic content experts and a Habits of Success coach to maximize its ability to customize every student's learning experiences across various subjects. "Out of the gate, we optimized too much for personalization and have since iterated on the model to find a better balance between the individual and the community," Hanover said. "We are discovering that finding a balance is particularly important for our scholars who have experienced significant trauma in their young lives. Predictability and stability is critical for this group. So we are finding new ways to create personalized learning experiences within this broader context."

Relationships extend beyond just teacher-student connections—they include relationships among students themselves, and among teachers and administrative teams. Participants also described efforts to deepen collaboration across these dimensions. For example, within his blended learning model, Chuck Branchaud of Coventry High School in Rhode Island, emphasizes student collaboration. "Almost everything we do in class involves collaboration so that students learn to break down communication barriers," Branchaud said. To encourage this, he inserted 40 feet of whiteboard around his classroom, which helped spawn a learning community centered on transparency and teamwork.

#2 Go slow to go fast when implementing competency-based models

Participants also engaged in an ongoing conversation at the conference on how to move a blended learning environment to a competency-based learning model.

Overwhelmingly, those schools that had embarked on a competency-based journey emphasized the importance of community buy-in. Erin Mote of Brooklyn LAB Charter School described her school's experience trying to push the needle toward competency-based approaches. She shared that Brooklyn LAB's early mistake was not effectively communicating the launch of new processes to the whole school community.

"We epically failed in our first year by rolling out a competency-based report card without talking to parents, and they were incredibly angry

and vocal about it," Mote said. "We called an all-school town hall the next week to both explain and to provide a traditional report card alongside a more competency-based one." She advised schools just starting to approach competency-based learning to think of it as a multi-year plan. "Find a way to work within the existing schedule in year one. Don't change up the schedule right away—wait until year two. You have to hold some things constant in order to have license to innovate."

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Other leaders likewise recommended solidifying a strong school culture before attempting to radically change long-held processes of the school, such as grading and schedules. "Loop the parents in as well to translate what these changes will mean," one educator from Rhode Island said.

Participants agreed that buy-in could be challenging not just among parents and families, but among students and teachers as well. Jason Appel of Barrington High School in Rhode Island explained how an attempt at a new assessment approach in his school backfired. "We shifted grading to start just highlighting the mistakes on tests and not scoring," Appel said. "This led to tremendous pushback from the students who were so focused on the grade. Most teachers gave it up."

For David Richards of Fraser Public Schools in Michigan, integrating teachers and students into the planning of a new competency-based system proved the only route to progress. "We're educating two generations at once, trying to bring both generations along in this conversation," Richards said, describing Fraser's multi-year transition to competency-based learning. He said his district borrowed and continuously follows a mantra from Calvin Watts of Kent School District in Washington: "Build nothing for us without

us." In Richards's experience, some teachers may hit the panic button if the amount of work to shift practices is not adequately supported by school and district leaders.

Other participants echoed how teachers need to be supported with ample time and opportunity to collaborate while new practices are tested and ironed out. For example, Brian Stack of Sanborn Regional High School in New Hampshire spoke of the value in setting aside shared planning time for teachers. "At our school, we changed our schedule so everyone had daily, common planning time three to four hours a week," Stack said.

In short, many participants agreed that both student and adult mindsets—including both teachers and parents—can make or break a transition toward competency-based education. As Diane Sanna of Bristol Warren Regional School District in Rhode Island said, this transition may be best understood as a two-part process: "Let's figure out, 'What is it we need to learn, and what is it we need to unlearn?'"

#3 Make students agents of their learning

Leading innovators also discussed their efforts to bring increased student agency into their models. The field commonly understands agency as students taking charge of who, what, where, why, and when they learn. This can include a wide range of dimensions like choice, self-awareness, self-management, social relationships, responsible decisions, time management, organization, and self-regulation on the way to a long-term, personalized goal. Although blended and personalized models may begin to customize better to students' needs and strengths, not all such models provide students with voice and choice.

Simona Simpson-Thomas of Providence Public Schools in Rhode Island referenced Chris Emdin, a professor at Columbia University, as an inspiration to her own efforts to incorporate student agency into the future of school design. "We will be able to create spaces where students can teach *us* what to do, create spaces to allow students to take the helm," Simpson-Thomas said. She described how her district is working to rethink the opportunities they present to students to learn in many ways. For example, her district reframed the Office of Dropout Prevention to be the Office of Multiple Pathways.

James Murray of Waukesha STEM Academy in Wisconsin said he hopes to shift the pedagogical paradigm of supporting students' growth of *how* to think, not *what* to think. "My goal in education is to help students move from masters of content to experts of context," Murray said. "Learning by doing is truly mastery, when a student can show you how to build something, or solve a problem in realtime."

Others shared examples of concrete evidence that this sort of ownership is actually taking place. "The aha moment is when a student shares what they've learned with a peer—or teaches another student something they understand," said Dallas Dance, formerly of Baltimore County Schools in Maryland.

And in Mineola Public Schools in New York, leaders developed a new assessment system in which all work is graded two ways: traditionally and with a standard-based rubric. "We don't want to just grade students. We want to recognize students when they exhibit habits of mind behavior," said

Michael Nagler. When students demonstrate success in a new standard or at completing a challenge, they earn badges. The badges incentivize learning and also ensure that each step of student learning is meaningful and accompanied by feedback. "Kids love it," Nagler said. "Now we're also doing badging with teachers."

#4 Expand the conversation about cultural relevance

Leading innovators also dove into efforts focused on integrating cultural relevance into personalized and blended learning environments. For example, one teacher from District of Columbia Public Schools said that educators should help infuse cultural relevance throughout learning experiences both inside and outside the classroom. "It shouldn't just be a class or a book," she said. "Ask students, where do you see your identity represented and supported in your school?" As another participant put it: "We need to stop looking at our students like they need to be saved. We need to meet them where they are."

Yet others noted that kickstarting the conversation to address students' cultural identities can be a challenge. "It can be eye-opening to see how many teachers have no knowledge of where to start teaching in a culturally-responsive way. This should be part of teacher prep," said Rafael Gallardo of Puget Sound Educational Service District in Washington. Gallardo described the considerations that his district team adopted when trying to deliberately foster an equitable, multicultural learning community. It can begin, he said, by asking questions like: "How are we designing support for teachers and meanwhile building in institutional structures? Is there structural or institutional racism when we build in processes [like blended or personalized learning]? How do we check that new structures are not reinforcing structures that don't allow everyone to enter?"

Greg Callaham of Alpha Public Schools in California described how the charter school network's model is focused on student leadership and teacher facilitation, explaining that for their schools, cultural identity is a critical part of student voice. "Many teachers want to have this conversation [on culture] but don't know how. Start the conversation outside the classroom first—in staff meetings and in advisory meetings with individual students."

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The Alpha team also took steps to make sure that students felt represented in the curriculum—they invited students to share personal stories and experiences and turned those into case studies that could be used as instructional material.

Besides ensuring that teachers have the mindsets, tools, and supports to address cultural relevance, participants echoed Callaham's call that students must be integral in these conversations as well. LeeAndra Khan, formerly of Gwendolyn Brooks Middle School in Illinois and now with Civitas Education Partners, shared that she often thinks about the perspective of the students she serves. "Are we asking them to do tasks that are challenging to them? Do tasks ask them to take different perspectives?" Khan said. "We have to remember what students need us for. It's not to learn the 50 states' capitals. They need us for experiences."

Rhode Island educators spoke about other efforts they had seen succeed not just in making sure that students were heard, but that their identities were part of system-wide reforms. For example, the Providence Student Union, a student-run advocacy group, pushed the district to offer an ethnic studies course. Providence Public School District empowered the students to build it themselves. But participants stressed that the message shouldn't be that cultural relevance is taken care of in a one-off ethnic studies course. Instead, the course started by asking students to talk about the things that made up their identity and then asked them where they see it reflected in school—and where it is not.

TO THE MAINSTREAM:

SCALING INNOVATIONS

While the first four tactics describe innovators at the cutting edge of redesign, there is also a different conversation afoot among blended and personalized learning champions: how to make sure new school and instructional models actually expand to reach the most students possible.

#5 Frame tech as one tool in the toolbox

Many attendees were in agreement that teachers are one of the most powerful forces behind scaling blended and personalized approaches. Reaching new and more educators remains high on most practitioners' lists. When it comes to expanding blended-learning efforts, though, another mindset shift has to happen: technology is an essential tool for going blended, but strong pedagogy will always be the backbone of a great blended program.

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Julie Coiro from the University of Rhode Island talked about a summer professional development institute that she runs on digital literacy. "We have teachers, librarians, and other educators coming and expecting the week to be about technology," Coiro said. "But we don't frame it in technology. We focus on collaboration, flexibility, the power of personal relationships, and creativity. It's an institute to learn about the culture in which, and from which, digital texts and tools can foster learning and engagement."

Once the larger frameworks are established, tech skills and resources are simpler to plug into the model. Michael Nagler of Mineola Public Schools in New York echoed this point. "We stopped doing PD [professional development] on tech," he said. Nagler noted that teachers are initially very uncomfortable not knowing everything about an edtech program. "But we reassure them that as soon as they get stuck, they can just ask their students and they'll know what to do!"

#6 Reinvent PD for the 21st century

A related theme for discussion was deepening the professional development experience. Many educators talked about taking the experience beyond a workshop room or a compliance-driven exercise. Many participants urged that instead teachers' professional development should mirror the kind of classroom we want to create. Kimberly Ramos of North Kingstown School Department in Rhode Island encouraged personalizing professional development. "If we want teachers to help grow students' individual interests, strengths, and goals, we need to foster that learning environment for teachers, too," she said.

"The old way of PD was 40 teachers in a room, collecting clock hours," Rafael Gallardo added. "There was no measure of the value gained from that session. [Now there are ways] to validate the quality of the work and the teacher experience." Participants dove in on the strategies they've taken and observed to enhance and incentivize continual professional growth. For example, Aylon Samouha of Transcend Education noted that teachers with a high level of self-awareness tend to be more effective. With this in mind, he asked, "How can we better prepare teachers to better measure themselves?"

Robyn Bagley of Rethink Education Consulting also recommended self-evaluation for teachers. At the school Bagley founded, Career Path High in Utah, teachers define competencies outlined within their job duties and responsibilities. The competencies encompass the skills necessary to be effective in the school's specific model of education. These are used to identify personal and group PD needs as well as for a collaborative evaluation process. "Teachers know and understand the competencies expected from their school and, through a collaborative process, identify areas they want to target for improvement and set PD challenges for themselves," Bagley said. Through this process, teachers gain competencies ranging from tech skills to curriculum development to personalized learning strategies.

Kristen Watkins of Dallas Independent School District in Texas also described her district's efforts to personalize professional development to different teachers' needs and strengths, supported by the tool BetterLesson. "We've developed an adult learner profile," Watkins said. "We pulled together 16 teacher and student actions into a rubric and started providing personalized learning coaching. That's where we align all our coaching and support at the teacher and leader level."

Similarly, Michael Nagler described how micro-credentialing in his district has been paired with incentives for teacher development. "We're calling the micro-credentials 'stackables,'" he said. "Teachers can select from various digital courses and stack them up to attain a 15-hour credit, and a salary bonus."

And Sami Smith of Distinctive Schools in Chicago described how a particular personalized PD exercise had a meaningful impact on her own teaching approach. "In one PD session, we were given 50 qualities on a slide and we had to choose and order our personal top ten," Smith said. Then they needed to cross out five, then

two, until each teacher had a personal list of top three skills. After, everyone walked around and found common ground with people from across the middle school. Finally, they looked for colleagues who had a different list to take note of the qualities they held together as a team. "It gave us permission not to be an expert in all things and to lean on the strength of the team," Smith said.

Christopher McNamara of Melbourne Girls Grammar School in Australia likewise emphasized the importance of giving adults permission to be both experts and amateurs depending on their circumstances. "We got rid of set personalized learning times. Our teachers come to us anytime with what they need and what they are looking for," McNamara said. School leaders spend the second half of the year building opportunities—sometimes including learning from experts and partners—for the next year that incorporate both school and teacher priorities. "We also allow teachers to take internships or bring forward personalized learning opportunities they'd like to do," McNamara added.

#7 Seek out smart approaches to scale

Besides aiming to prepare and support more teachers, for most of the innovators in attendance, scaling innovative approaches remains a core challenge—but also an opportunity. Participants shared warnings about how efforts to scale blended and personalized learning can backfire. Tricia Maas of the Center on Reinventing Public Education at the University of Washington Bothell warned of districts taking a fast-track route to scaling. "Some districts scale broadly but in the end they scale nothing at all." Other participants chimed in that this kind of aggressive scaling attempt can lead to popular pushback and a shift back in the old direction.

When encouraging the scaling of models, there is a clear tension between being flexible and personalized enough in response to varied local conditions, and ensuring the fidelity of certain model components. Andrew Frishman of Big Picture Learning suggested that scaling is best done with a generous frame of mind. "We think of it as spread instead of scale," Frishman said. "Our goal is not to be imperial nor colonial but rather to leverage existing local assets to spread our proven approach and practices."

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Other participants shared ideas for how innovators might better gauge a school's or a classroom's readiness to scale blended and personalized-learning practices. Some leaders noted that readiness depends on relationships—that is, how deeply the school and district community at large is invested in change. "We have to scale appropriately and bring the students into the partnership. We're not doing things to students—we're doing things for students," said LeeAndra Khan.

In addition, Dallas Dance noted that these relationships must also exist among adults in a system. As a leader seeking to accomplish district-wide scale, he focused on creating a unified culture of trust across the district to make district support and collaboration a simpler process. "Every principal that works in Baltimore is an extension of me. I have their cell numbers in my phone, I know their birthdays, and I know their spouses' names," Dance said. "Why do I build these relationships, this culture? So I can go to them and ask, 'What do you need?'"

Participants also discussed the value of having specific criteria and tactics on hand when making scale-based decisions. For Michael Fauteux of Leadership Public Schools in California, such essential criteria include gauging the state of a particular innovation or model. When considering scale, Fauteux asks himself: "Is it producing results (quantitative and qualitative)? Does teacher practice change? Does it produce demand? Is it equity-focused?"

Another gating mechanism to scale can be testing whether leaders themselves are able to communicate the high-level goals driving a given effort, according to Mackey Pendergrast of Morris School District in New Jersey. "Even if

I'm being very intentional and explicit, all my principals can hear the message and interpret it differently—like a game of telephone," Pendergrast said. "So we started making videos and sharing them for all stakeholders. If the end goals are very clear, and all schools understand the principles that we base them on, that helps schools move forward from there."

Jin-Soo Huh, then of the California public charter network Alpha Public Schools and now of the Illinois charter school network Distinctive Schools, warned that tackling mindsets is often at the core of effectively scaling practices. "I think there's a sink-or-swim mentality of 'this teacher gets it' or doesn't," Huh said. "And then there's a caricature around those early adopters that make it easy for people to say, 'That teacher is succeeding or doing [blended] because they're tech savvy, or they're young, or that they have a lot of energy.'"

Others offered solutions that could help schools to move beyond such caricatures. For example, Grace Magley of Natick Public Schools in Massachusetts suggested that robust professional learning communities (PLCs), along with principles of learning, can be a bridge for educators to achieve new practices. "Natick has no instructional technology specialists," Magley explained. "But we do have a very strong PLC model where they groom facilitators for the PLCs. Teachers are the decision-makers, and the administration supports that."

The insights gathered from BPLC discussants were far too numerous to comprehensively include on these pages. Still, the recommendations and reflections woven throughout this report indicate what is foremost on the minds of educators working to advance and refine the blended and personalized learning field.

To join us for next year's event, check out blendedlearningconference.com.

About the Conference

The Highlander Institute, The Learning Accelerator, and the Clayton Christensen Institute collaborate to convene the best blended-learning leaders and implementers from across the country in Providence, Rhode Island, each year. Our 2018 Blended and Personalized Learning Conference will take place from April 5–7. The first day of the conference is focused on site visits to high-functioning, personalized schools and classrooms in the Providence area. Day 2 includes a convening on Leading Transformative Change that runs concurrently with the invitation-only Advanced Practitioner Summit. The main conference on Day 3 focuses on supporting and delivering high-quality instruction for an audience of 1,200 teachers, administrators, and related professionals. The past three events have sold out. For more information and registration, please visit blendedlearningconference.com.

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The Clayton Christensen Institute for Disruptive Innovation is a nonprofit, nonpartisan think tank dedicated to improving the world through Disruptive Innovation. Founded on the theories of Harvard professor Clayton M. Christensen, the Institute offers a unique framework for understanding many of society's most pressing problems. Its mission is ambitious but clear: work to shape and elevate the conversation surrounding these issues through rigorous research and public outreach.

About the Highlander Institute

The Highlander Institute is an education nonprofit focused on researching, developing, and disseminating innovative educational methods to improve outcomes for all learners. Located in Providence, Rhode Island, the Highlander Institute focuses on methods that create student-centered, personalized learning environments and views these practices as a catalyst for social change.

About the Learning Accelerator

The Learning Accelerator aims to accelerate the implementation of high-quality blended learning initiatives across the U.S. TLA helps organizations—schools, districts, nonprofits, and funders—understand blended and personalized practices, set conditions for scaling work system-wide, effectively support their people, and measure results of efforts, all with a keen focus on and commitment to equity.