LINDSAY UNIFIED
SCHOOL DISTRICT

SUMMIT
PUBLIC
SCHOOLS

Transcend

SITE LEVEL
Conditions

Resources to enable personalized learning

OCTOBER 2018

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EXECUTIVE SUMMARY

The Site Level Conditions resource is an articulation of what must be true at the site level to enable educators and students to realize the principles of personalized learning, as articulated in the _Instructional Look Fors_. This resource was designed to support system and school leaders in their efforts to foster optimal site level conditions for personalized learning.
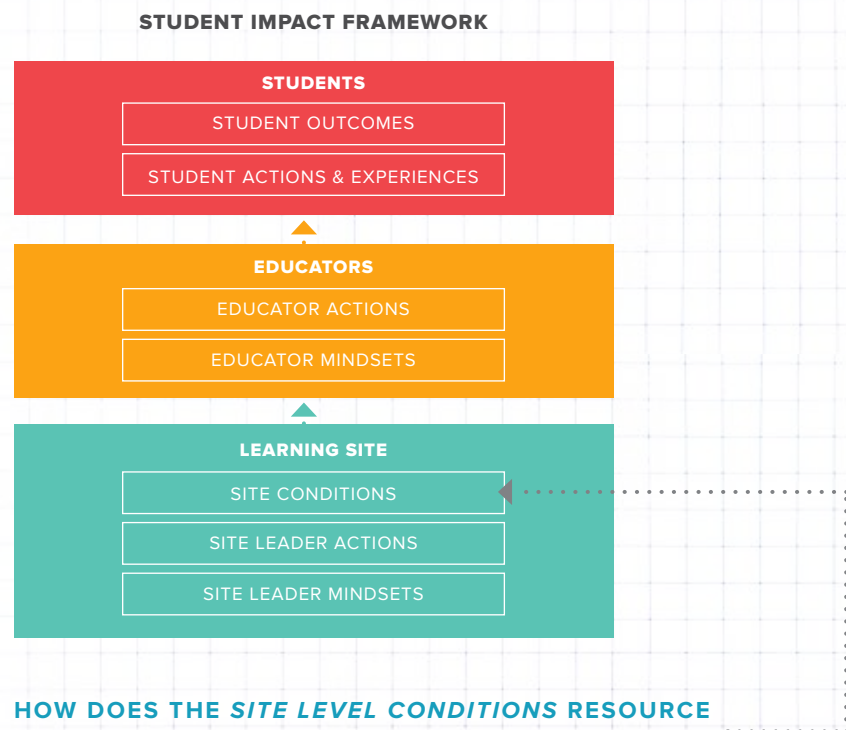
Introduction

OVERVIEW

Personalized learning has the potential to empower students to lead successful and fulfilling lives, yet shifting teaching and learning practices are significant undertakings. Schools, systems, and their many stakeholders have voiced a need for clarity on what personalized learning entails at both the classroom and site levels, an articulation of capacities and mindsets needed to implement new personalized learning practices, and confidence that the changes they are making will positively impact outcomes for students.

Conditions at a school site can either help or hinder educators from taking actions necessary to positively impact students' experiences and equitable outcomes. The *Site Level Conditions* attempt to document the set of conditions consistently present in effective personalized learning sites. This resource helps schools create a common language, set goal posts for growth, and prompt teams to build toward an environment that would enact personalized learning. The conditions are based on 10+ years of experience at Lindsay Unified School District, Summit Public Schools, and 300+ Summit Learning implementations nationally, as well as Transcend's experience with innovative schools across the country. The conditions are most relevant for site leaders looking to shift toward or deepen personalized learning at their school, as well as system leaders looking to support these transitions.

INTRODUCTION TO THE STUDENT IMPACT FRAMEWORK

The Student Impact Framework is an oversimplified model of how student impact is achieved. This resource describes ideal student outcomes and asserts that these outcomes are affected by students' actions and experiences, which are in turn affected by educators' actions and mindsets. Educators' actions and mindsets are then shaped by site level conditions and site leaders' actions and mindsets. We have developed resources, including the *Site Level Conditions*, to support the realization of the Student Impact Framework.

STUDENT IMPACT FRAMEWORK

STUDENTS
- STUDENT OUTCOMES
- STUDENT ACTIONS & EXPERIENCES

EDUCATORS
- EDUCATOR ACTIONS
- EDUCATOR MINDSETS

LEARNING SITE
- SITE CONDITIONS
- SITE LEADER ACTIONS
- SITE LEADER MINDSETS

HOW DOES THE *SITE LEVEL CONDITIONS* RESOURCE SUPPORT THE STUDENT IMPACT FRAMEWORK?

As seen in the *Student Impact Framework* (above), the *Site Level Conditions* is one of three resources supporting student outcomes and the school's vision. While the *Instructional Look Fors* provide a set of observable indicators at the classroom or learning environment level, the *Site Level Conditions* outline a set of observable indicators at the site level that foster educators' ability to personalize learning in their classrooms. *Educator and Leadership Mindsets Inquiry* enable both the ability to foster the conditions ripe for personalized learning and the ability to implement the *Instructional Look Fors*. (See our website for how all the personalized learning resources fit into the Student Impact Framework.)

HOW CAN I USE THE *SITE LEVEL CONDITIONS?*

The content of this more generic resource is not meant to be user-facing, but rather to be used as fodder for building contextualized school-specific tools. Possible use cases for this content include:

▶ **Planning ahead:**
For many leaders and personalized learning stakeholders, an early question centers around, "What would it take for us/this system to take on personalized learning?" The domains and conditions offer a perspective on the many ways that effective personalized learning would impact the site and system.

▶ **Site level reflection/self-assessment:**
The tool can be used to create a customized site-level reflection: "Where are we now? Where might we prioritize our efforts at the site level to enable personalized learning environments for students?" (See here for a Summit Learning example).

▶ **Collaborative reflection/self-assessment:**
This tool can support collaborative efforts between schools, districts/CMOs, and community partners to reflect, self-assess, and make collective goals and action plans to enable or grow conditions together.

FOR MORE IDEAS on how you might use this content in your school, take a look at Summit and Lindsay's tools.

HOW IS THE *SITE LEVEL CONDITIONS* RESOURCE ORGANIZED?

The conditions are organized into twelve site domains shown on the right. Domains located at the center of the diagram (Shared Vision and Change Management, Conducive Culture, Disciplined Results Monitoring, and Continuous Improvement) require heavy initial investment and ongoing and continuous adaptive leadership, characterized as requiring changes in people's priorities, beliefs, habits, and loyalties[1]). The outer ring of domains are intentionally not given an order of priority as different contexts will require different prioritization of these conditions.

Note that while the outer ring of the circle visually showcases nine equal segments, it's likely that some of these domains will take significantly more time and effort to improve depending on the site context. Generally, domains that require adaptive leadership or shifts in people's priorities, beliefs, habits and/or loyalties have fewer clear roadmaps, are highly context specific, and often have longer timelines for change (see the *Equity at the Forefront* section below). Other domains may contain more conditions solved "through the organization's current structures, procedures and ways of doing things,"[2] or via technical leadership which may mean timelines can be more easily fast tracked if prioritized. (See the accompanying *Educator and Leadership Mindsets Inquiry* which helps leaders recognize when shifting mindsets may be in play.)

1. Heifetz, R. A. 1., Grashow, A., & Linsky, M. (2009). The practice of adaptive leadership: Tools and tactics for changing your organization and the world. Boston, Mass.: Harvard Business Press.

2. Heifetz, R. A. 1., Grashow, A., & Linsky, M. (2009). The practice of adaptive leadership: Tools and tactics for changing your organization and the world. Boston, Mass.: Harvard Business Press.

Diagram domains:
- FLEXIBLE, STUDENT-CENTERED CURRICULUM AND ASSESSMENTS
- ALIGNED MECHANISMS TO RECRUIT ONBOARD AND RETAIN CAPABLE FACULTY
- VISION-ALIGNED POLICIES IMPACTING THE SCHOOL SITE
- SYSTEMATIC TUNING OF INSTRUCTIONAL PRACTICE
- SUPPORTIVE FACILITIES AND OPERATIONS
- PURPOSEFUL USE OF TIME
- ENABLING TECHNOLOGY
- VARIED OPPORTUNITIES BEYOND SCHOOL WALLS
- EMPOWERED FAMILIES AND CAREGIVERS
- CONDUCIVE CULTURE
- SHARED VISION + CHANGE MANAGEMENT
- DISCIPLINED RESULTS MONITORING + CONTINUOUS IMPROVEMENT

HOW WAS THE *SITE LEVEL CONDITIONS* RESOURCE DESIGNED?

Because every site operates differently with unique contexts and will have many paths to achieving a condition, the conditions were designed to set goal posts for conditions that are present in effective personalized learning settings (goal posts that in many cases require continual maintenance and upkeep). The content intentionally avoids descriptions of how to universally achieve these conditions given that the paths will and should vary. (See more here for how Summit Learning has used the conditions in their system.)

Equity at the Forefront
Equity is an especially adaptive and complex issue, often involving deep community work and focus. The conditions intentionally call attention to areas in which mindset shifts, including shifts in key equity mindsets, might be in play. For the purposes of clarity and alignment, this document uses the definitions of equity, inclusion, and diversity articulated by the Racial Equity Tools Glossary.[3]

To continuously keep equity at the forefront, a diverse leadership team and an inclusive process inviting all stakeholder voices is essential. Implementers should continually ask themselves, "Who's leading? Who's at the table making decisions with and for our community? Is the decision-making body representative of our entire student population? How might we purposefully bring in voices from the community that are less frequently heard?"

District/CMO Site Relationships
Due to the wide range in district/CMO oversight and support for a site transitioning to personalized learning, this resource is intentionally focused on the school site as the unit of change. However, the authors recognize that personalized learning often requires sites to have sufficient flexibility, especially in systems with a small percentage of sites transitioning to personalized learning. The domain *Vision-Aligned Policies Impacting the School Site* outlines policies that are particularly important for a school to work through with their district/CMO. The authors encourage districts/CMOs and sites to use the condition statements to co-determine where and how the district/CMO might support or give additional flexibility for personalized learning to flourish.

The Role of Leaders
Finally, while paths to achieve the site level conditions vary, leaders and leadership teams play a critical role in modeling mindsets, removing barriers, supporting teachers, contributing to keeping the vision strong and clear, and much more. While the focus of this resource is on clarifying conditions in ideal learning environments, it is clear that a substantial next step is to find common leadership actions and capacities that might support leaders in moving toward these goal posts (See more here for how Summit Learning has used the conditions in their system.)

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3. **Equity** is the fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. Improving equity involves increasing justice and fairness within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society.

Inclusion is the act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate. An inclusive and welcoming climate embraces differences and offers respect in words and actions for all people. It's important to note that while an inclusive group is by definition diverse, a diverse group isn't always inclusive. Increasingly, recognition of unconscious or 'implicit bias' helps organizations to be deliberate about addressing issues of inclusivity.

Diversity includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, and gender, we embrace a broader definition of diversity that also includes age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. Our definition also includes diversity of thought: ideas, perspectives, and values. We also recognize that individuals affiliate with multiple identities.

Site Level Conditions
FOR PERSONALIZED LEARNING

CENTRAL DOMAINS

ADDITIONAL DOMAINS
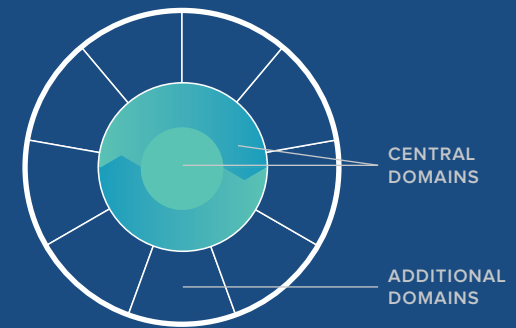
CENTRAL DOMAINS

Shared Vision and Change Management
Stakeholders are galvanized by a common vision for student experiences and multidimensional outcomes and are invested in the continuous change leadership needed to align systems and behaviors to that vision.

Conducive Culture
The culture of the school enables students and faculty to feel affirmed about who they are, connected to one another, and motivated to strive toward ambitious personal and community goals.

Disciplined Results Monitoring and Continuous Improvement
Collaborative, data-driven processes of monitoring student progress and ongoing reflection and iteration ensure that appropriate interventions occur for every student and that site-wide processes, systems, and learning experiences continuously improve.

ADDITIONAL DOMAINS

Flexible, Student-Centered Curricula & Assessments
Curricula and assessments enable learning experiences that help students grow steadily toward multidimensional learning outcomes in ways that are responsive to their individual needs, goals, and preferences.

Aligned Mechanisms to Recruit, Onboard and Retain Capable Faculty[4]
Faculty recruitment, induction, and ongoing development ensures faculty are clear about their responsibilities, understand and align with the shared vision, experience success, and have career development opportunities to continue growing.

Systematic Tuning of Instructional Practice
Faculty continuously reflect and improve upon the best instructional practices to drive toward a shared vision of effective personalized learning via faculty collaboration, coaching, and skill-building.

Purposeful Use of Time
Schools allocate sufficient time for all key student learning modes (e.g., 1-to-1 and small group customized learning, student self-directed learning, projects), educator collaboration and planning, and community building.

Empowered Families and Caregivers
Families, students, and educators are active partners in helping students set, monitor, and advance toward their goals and aspirations.

Varied Opportunities Beyond School Walls
Access points beyond the walls of the school support students to address barriers and extend students' opportunities to explore passions and pursue goals and aspirations.

Enabling Technology
All members of the school use technology in ways that provide real-time, responsible access to learning and assessments and that facilitate collaboration and communication around students' goals and aspirations.

Supportive Facilities and Operations
Site-level operations, including the physical environment, are configured and resources are allocated in ways that support a flexible, customized, self-directed, and collaborative instructional model.

Vision-Aligned Policies Impacting the School Site
The learning environment operates within a policy context that is conducive to both learning and demonstration of mastery that happen flexibly in a variety of times, places, and customized conditions.

4. Faculty represents all staff on site

SHARED VISION & CHANGE MANAGEMENT

Stakeholders are galvanized by a common vision for student experiences and multidimensional outcomes, and are invested in the continuous change leadership needed to align systems and behaviors to that vision.

a A long-term vision and mission exists for the learning community that showcases a relentless commitment to equitably preparing all students for fulfilling lives and articulates student graduate outcomes (e.g., academic outcomes, cognitive skills, mindsets, and habits) for doing so.

b Key stakeholders have a shared understanding of and investment in the concrete ways in which all elements of the site's model serve to realize the site's vision and mission for the learning community and its students.

c A wide coalition of stakeholders (e.g., students, families, faculty, district, local businesses, community organizations) understand and embrace the vision, can articulate the need for change, sustain the change, and feel urgency in proactively taking steps toward the vision.

d Leaders at different levels of the organization champion and sustain the vision so that the vision persists through adversity and does not depend on any single individual.

CONDUCIVE CULTURE

The culture of the school enables both students and faculty to feel affirmed about who they are, connected to one another, and motivated to continuously pursue ambitious personal and community goals.

a Explicit shared values and mindsets guide the school's approach to realizing its vision, including a commitment to equity that is evident in every program, course, and interaction.[5]

b Faculty and students share a growth mindset, curiosity, openness, and willingness to persevere through change.

c Collaborative learning and continuous iteration are faculty norms fueled by site leaders and educators' collective ownership over student multidimensional outcomes, trust in one another, and urgency in their work. (See also *Disciplined Results Monitoring and Continuous Improvement* C)

d There are consistent, high expectations for behavior and supports for students to learn from mistakes and to restore an environment of trust, safety, and productivity.

e All members of the learning community feel cared for, known, and supported.

f The school is deliberately infused with cultural elements that are meaningful to the represented groups and language that represents its students, families, and educators.

g The school environment reinforces the value and attainability of learning[6] so that students are motivated and confident students who contribute equitably and pervasively to the learning environment.

5. New England Secondary School Consortium (2016). Global Best Practices: An Internationally Benchmarked Self-Assessment Tool for Secondary Learning. Retrieved from http://www.newenglandssc.org/resources/publications

6. Farrington, C.A. et al. (2012). Teaching Adolescents to Become Learners: The Role of Noncognitive Factors in Academic Performance: Critical Literature Review. The University of Chicago Consortium on School Research. Retrieved from: https://consortium.uchicago.edu/ sites/default/fles/publications/Noncognitive%20Report.pdf

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DISCIPLINED RESULTS MONITORING AND CONTINUOUS IMPROVEMENT

Collaborative, data-driven processes for monitoring student progress and ongoing reflection and iteration ensure that appropriate interventions occur for every student and that school-wide processes, systems, and learning experiences continuously improve.

a   Clear goals and metrics are used to monitor every student's progress, ensuring both a commitment to equity and a commitment to providing interventions for students when needed, with particular emphasis on students with defined learning needs.

b   Educators and site leaders collect, review, and make meaning of quantitative and qualitative data through consistent data practices, including deliberately looking at sub-groups through an equity lens.

c   Faculty share responsibility for problem-solving toward the vision and structures, and norms are in place to create space for regular reflection, mutual feedback, and alignment. (See also *Conducive Culture* C)

d   Data trends are used with and for students (and their families/caregivers) to inform changes to learning plans (e.g., customized learning and intervention plans, especially for students with defined learning needs), with educators to shift instructional practices, and to manage and continuously improve sites more broadly.

e   The site has a transparent process for sharing key metrics and changes with relevant school and system level stakeholders on a regular basis.

FLEXIBLE, STUDENT-CENTERED CURRICULA & ASSESSMENT

Curricula and assessments enable learning experiences that help students grow steadily toward multidimensional learning outcomes in ways that are responsive to their individual needs, goals, and preferences.

a   A robust and challenging curriculum enables learning to be customized to each student's unique needs, goals, and preferences and supports relevant, purposeful, and rigorous learning for all as described in the *Instructional Look Fors*.

b   Curriculum is vertically aligned with multiple levels of scaffolding and is explicitly designed to support group work, self-directed work, and regular facilitator feedback and direction.

c   Curriculum is accessible to students at all times to ensure flexibility in where and when learning occurs.

d   Educators and students have access to a robust set of on-demand assessments using multiple modalities from which information can be used to support students' progress and to demonstrate mastery.

e   Student assessments are based on a broad view of student success; inputs are transparent for students (e.g., mastery of content, knowledge, habits, and skills); and social-emotional skills measurement is used motivationally rather than punitively.

f   Assessment data is accessible, transparent, and available in a timely manner such that all stakeholders in the learning environment can gauge student progress and mastery.

ALIGNED MECHANISMS TO RECRUIT, ONBOARD, AND RETAIN CAPABLE FACULTY[7]

Faculty recruitment, induction, and ongoing development ensure faculty are clear about their responsibilities, understand and align with the shared vision, experience success, and have career development opportunities to continue growing.

a   Recruitment procedures ensure an inclusive process with a diverse pool of candidates who understand and embrace the philosophy and vision for personalized learning and screen for the key capacities and *Educator and Leadership Mindsets Inquiry* required for success.

b   The school's induction process both meets the local induction standards for teaching and is aligned with the personalized learning vision.

c   Thoughtful and equitable professional advancement and performance recognition procedures motivate educators to increase their professional expertise, pursue advanced degrees, assume leadership roles, and make valuable contributions to the school community.

d   Faculty members are clear on their responsibilities in their roles, experience success and sustainability, and view themselves not as employees but as a community of leaders, learning facilitators, and student mentors.

e   All school faculty feel respected because the school values their cultures, belief systems, and what they bring to the community.

7. Faculty represents all staff on site

SYSTEMATIC TUNING OF INSTRUCTIONAL PRACTICE

Faculty continuously reflect and improve upon the best instructional practices to drive toward a shared vision of effective personalized learning via faculty collaboration, coaching, and skill-building.

a   The *Instructional Look Fors* paired with the *Educator and Leadership Mindsets Inquiry*, or adapted instructional frameworks, establish a common language and shared vision of effective instruction.

b   The *Instructional Look Fors* paired with the *Educator and Leadership Mindsets Inquiry*, or adapted instructional frameworks, are used to observe and analyze teaching practices to systematically assess, coach, and improve teaching practices.

c   Professional learning opportunities (e.g., site-wide faculty PDs, grade-level team meetings) are based on data from classroom observations and/or student work and are designed to hone instructional practices (outlined in the *Instructional Look Fors*) and deepen implementation capacities (e.g., capacities for instruction or *Educator and Leadership Mindsets Inquiry* required).

d   Every faculty member is able to name their own personal growth goal/s on the *Instructional Look Fors* and educators regularly reflect on growth and set new goals using ongoing feedback, professional development, job-embedded coaching and professional learning communities.

e   Targeted supports (e.g., additional professional developement and coaching, lesson planning templates, protocols for reflection and action planning) are in place for novice implementers of personalized learning. (See also *Purposeful Use of Time* E)

PURPOSEFUL USE OF TIME

Schools allocate sufficient time for all key student learning modes (e.g., 1-to-1 and small group customized learning, student self-directed learning, projects), educator collaboration and planning, and community building.

a The schedule includes sufficient time for regular 1:1 and small group interactions with educators such that students are deeply known and supported emotionally and academically.

b Student learning sessions have adequate time for covering required content, setting goals, practicing skills and habits, and assessing mastery.

c Educators have sufficient scheduled time to review data, plan for instruction, collaborate, and provide customized feedback.

d Extended opportunities for learning outside of school hours exist with educators capable of providing effective support (e.g., office hours, summer school).

e Additional planning time and resources (e.g., induction supports, experienced buddy teachers, peer observations) are provided for educators new to personalized learning. (See also *Systematic Tuning of Instructional Practice* E)

EMPOWERED FAMILIES & CAREGIVERS

Families, caregivers, students, and educators are active partners in helping students set, monitor, and advance toward their goals and aspirations.

a Recruitment and enrollment processes ensure that families and caregivers have sufficient understanding of the school model to act as partners in supporting their students prior to their child starting school.

b Families and caregivers not only understand their child's goals, progress toward those goals, and their role in helping students progress toward their goals, but are also engaged in the co-creation of the student's individualized learning plans.

c Families, caregivers and educators have regular contact with each other and appreciate their respective roles in the student's life.

d All families and caregivers have meaningful channels to partner with school faculty and ensure the unique needs and passions of their children are being met and fostered in school.

e Families and caregivers feel welcome and included in school culture and life because the school values their cultures, identities, belief systems, and what they and caregivers bring to the community (particularly for families and caregivers who may be traditionally marginalized).

VARIED OPPORTUNITIES BEYOND SCHOOL WALLS

Access points beyond the walls of the school support students to address barriers and extend students' opportunities to explore passions and pursue short- and long-term learning goals.

a Access to health, dental, and mental health providers ensures that students can obtain the health services they need to learn at their best.

b Connections to enrichment programs (after-school programs, summer camps, foreign exchange programs, extracurricular activities, etc.) support students' varied interests and short- and long-term goals.

c Students have opportunities to engage with postsecondary education institutions and with college preparation and scholarship programs to support students' preparation and persistence in postsecondary pursuits.

d Students have opportunities to engage in workplace opportunities (e.g., internships, externships) that give them exposure to career choices and experience using their skills in real-world settings.

ENABLING TECHNOLOGY

All members of the school use technology in ways that provide real-time, responsible access to learning and assessments, and facilitate collaboration and communication around students' short- and long-term goals.

a Technology is easily accessible and incorporated into learning (e.g., sufficient wall outlets, device storage, single sign on into multiple content providers if appropriate).

b All students, educators, and families have equitable access to a computer and internet at school and at home.

c High-speed internet access throughout the school supports all students and faculty working simultaneously.

d A learning platform and/or suite of digital content providers allow students to advance through scaffolded curriculum pathways and clearly indicate students' progress through material (e.g., percentage of content mastered).

e Comprehensive data systems pull from learning management, assessment, and student information systems and allow supporting educators (e.g., at minimum grade level teams, a mentor/advisor, or an adult connection to students' families) to provide informed and aligned support for students.

f Key curricular data and reporting tools are interoperable (e.g. data is easily accessible and centralized).

g Students and educators act as digital citizens with integrity and own the responsibility of reporting or identifying cases of misconduct (e.g., cyber-bullying, misuse of citations, illegal downloading of materials, falsifying identify, misuse of digital tools).

SUPPORTIVE FACILITIES AND OPERATIONS

Site-level operations, including the physical environment, are configured and resources are allocated in ways that support a flexible, customized,self-directed, and collaborative, instructional model.

a Space allows for a variety of groupings for learning to incorporate individual learning, 1:1 meetings with educators, small group conversation, or a whole class learning format. (e.g., furniture can be moved/ is modular to encourage collaboration when appropriate.)

b Acoustics or special accommodations (e.g., headphones, ability to sit in the hall, quiet rooms) allow for multiple small groups to engage in active discussion without noise levels disrupting learning.

c Leaders plan startup and/or sustained funds for the model and appropriate staffing (e.g., tech devices and infrastructure, digital curriculum, professional developement on mindsets and capacities, ongoing coaching) and secure both in advance.

d Flexible transportation gives students the option to have some supported work time after school hours.

e Buildings are open for extended hours to support additional learning opportunities (e.g., office hours, after school, summer school) and are staffed with educators capable of supporting personalized learning (e.g. having the necessary mindsets, an understanding of the relevant learning platform/technology tool(s)).

VISION-ALIGNED POLICY ENVIRONMENT

The learning environment operates within a policy context that is conducive to both learning and demonstration of mastery that happen flexibly in a variety of times, places, and customized conditions.

a Students have flexibility regarding where and when they learn, demonstrate mastery, and earn credit (through freedom from seat-time and "line of sight" requirements or other work arounds).

b Schools can provide flexible, on-demand interim and summative testing (which may require loosening policies requiring end-of-course assessments).

c Scheduling and staffing can be flexible (via class-size policy changes, merging classes, or using creative staffing measures).

d Innovative staffing models create flexibility for professional development days beyond the district's typical allocation (via repurposing site-level professional developement, securing funds to enable the additional professional developement days, or making changes to collective bargaining agreements).

e Educator, coach, and site leader evaluation systems and policies are aligned to the vision for personalized learning.

f Grading policy is representative of understanding of material versus the timeliness of completion.

g Schools are able to take full advantage of digital tools (via data-privacy and technology use policies at the district, state, and federal level).

h Athletics eligibility is based on adequate academic progress in a mastery-based grading environment (via athlete eligibility policies).

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This framework and its corresponding tools are living documents and will continue to change as both systems iterate, learn, and improve the content. We welcome thoughts and feedback at dfranco@lindsay.k12.ca.us.