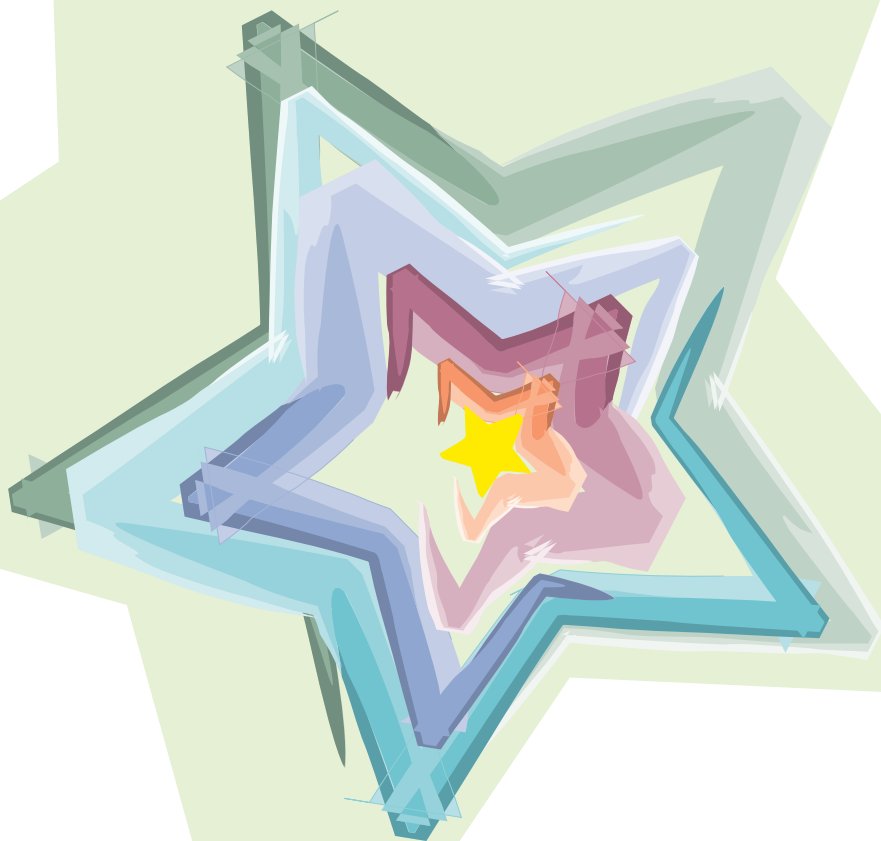


Changing Systems to Personalize Learning

Personalized Learning



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Personalized Learning

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Contents

Protocols Index	vi
About This Workshop	1
Getting Started	
Planning to Meet Personal Aspirations and Common Standards	7
Five Key Dimensions Supporting Personalized Learning	9
What is Personalized Learning?	12
Key Dimension #1: Purpose	
The Purpose of Personalized Learning Options	21
Protocol 1: Identifying a Shared Vision for Student Learning	23
Protocol 2: Ranking Priorities in Program Development	27
Protocol 3: Using NASSP <i>Breaking Ranks</i> ™ Recommendations to Reflect and Revise	31
Going Public: Asserting a Purpose for Personalized Learning	33
Key Dimension #2: Organization	
Organizing a Personalized Learning Project	35
Protocol 4: Environmental Scan: Looking for Constraints and Opportunities	39
Protocol 5: Adapting Systems to Allow Growth	41
Going Public: Organizing a Project to Grow	43
<i>Reflective Interlude</i>	44
Protocol 6: Chalk Talk	45
Key Dimension #3: Content and Process	
The Content and Process of Personalized Learning	47
Protocol 7: Focusing and Defining: Three Options in Personalized Learning	53
Protocol 8: Practicing Mapping: Dialogue and Search for Learning Options	59
Protocol 9: Personal Learning Plans: Sketching a PLP Sequence in the High School Years	67

Protocol 10: Team Consensus: Issues in Portfolio Planning	75
Protocol 11: Portfolio Content: Seeking Portfolio Artifacts From Academic Courses	79
Protocol 12: Preparing for Student Presentations	87
Going Public: A Graphic Representation of Parts Creating a Whole Process	88
Key Dimension #4: Assessment	
Assessing Personalized Learning	89
Protocol 13: Assessing Performance: Designing a Rubric for Student Presentations Across Subjects	97
Protocol 14: Assessing Program Development: Tracking Incidents Toward Program Adaptation	101
Going Public: Selecting Indicators for Progress in Program Development	103
Key Dimension #5: Leadership	
Collaborative Leadership	105
Protocol 15: Discussion of Leadership Across Organizational Boundaries	109
Protocol 16: Strategy Development: Preparing the Whole Community for Systemic Change	113
Going Public: Leadership Through Action Planning	114
<i>Final Reflection</i>	
Five-minute “Freewrite” on Change	116
Bibliography	117

Protocols Index

Protocol 1: Identifying a Shared Vision for Student Learning	23
Protocol 2: Ranking Priorities in Program Development	27
Protocol 3: Using NASSP <i>Breaking Ranks</i> ™ Recommendations to Reflect and Revise	31
Protocol 4: Environmental Scan: Looking for Constraints and Opportunities	39
Protocol 5: Adapting Systems to Allow Growth	41
Protocol 6: Chalk Talk	45
Protocol 7: Focusing and Defining: Three Options in Personalized Learning	53
Protocol 8: Practicing Mapping: Dialogue and Search for Learning Options	59
Protocol 9: Personal Learning Plans: Sketching a PLP Sequence in the High School Years	67
Protocol 10: Team Consensus: Issues in Portfolio Planning	75
Protocol 11: Portfolio Content: Seeking Portfolio Artifacts from Academic Courses	79
Protocol 12: Preparing for Student Presentations	87
Protocol 13: Assessing Performance: Designing a Rubric for Student Presentations Across Subjects	97
Protocol 14: Assessing Program Development: Tracking Incidents Toward Program Adaptation	101
Protocol 15: Discussion of Leadership Across Organizational Boundaries	109
Protocol 16: Strategy Development: Preparing the Whole Community for Systemic Change	113

About This Workshop

The success of personalized learning depends directly on the guidance of a caring adult—a teacher who meets regularly with the student to adapt plans, reflect on portfolio pieces, and prepare for assessment.



ABOUT THIS WORKSHOP

Welcome to the *Personalized Learning* workshop.

In a climate where schools must tailor instruction and curriculum to promote high student achievement on standardized tests, how can high schools adapt their programs so students actively pursue individualized learning in the classroom, and beyond? What will it take to imagine, design, develop, field-test, and refine an approach to personalized learning that lets each student set a course for his or her own development and academic success?

The *Personalized Learning* workshop helps high school change teams (made up of teachers, students, administrators, and community members) answer these questions and design programs that clarify students' purposes for learning so they can begin to use what they learn to enrich and direct their lives. With a focus on **Personal Learning Plans (PLPs), portfolios, and student presentations**, this workshop will guide you through designing a personalized learning project that you can present to your faculty and field-test in your school. In this process, you are a potential teacher-of-teachers, an educator who assumes responsibility for his or her own practice but who also works actively to improve the teaching profession. The worksheets and protocols throughout the guide are also available as 8-1/2" x 11" PDF files on the CD ROM at the back of the book for your convenience in working with full-size documents or replicating the exercises in the future.

The workshop is organized into five Key Dimensions that support team decision-making and design: purpose, organization, content, assessment, and leadership. Through this workshop, you will learn how to work as a group to clarify each of these Key Dimensions:

1. Purpose: Create and refine clear *goals* for personalized learning processes in your own school that are based on proven practice;
2. Organization: Sketch the *organizational* structures and processes your school must develop in order to offer personalized learning opportunities to each student;
3. Content: Select approaches to *Personalized Learning Plans, portfolios, and student presentations* that are consistent with your purpose;

4. Assessment: List *outcome indicators* that will allow your team to assess the effects of personalized learning over time;
5. Leadership: Adopt a *leadership role* that fits your own ideals and the needs of your team.

A foundation in *Breaking Ranks*™ (NASSP, 1996)

In 1996, the National Association of Secondary School Principals (NASSP), in partnership with the Carnegie Foundation for the Advancement of Teaching, published *Breaking Ranks: Changing an American Institution*, offering a series of 82 recommendations that provide a powerful and challenging vision of the 21st-century high school. Seven of these recommendations provide a rationale for personalized learning as we have described it above:

Personal Learning Plans

Chap. No.

- | | | |
|----|----|---|
| 01 | 06 | Each student will have a Personal Plan for Progress to ensure that the high school takes individual needs into consideration and to allow students, within reasonable parameters, to design their own methods for learning in an effort to meet high standards. |
| 06 | 02 | The school will review each student's Personal Progress Plan continually and indicate the extent of progress toward graduation and post secondary transition plans. |

Portfolios

- | | | |
|----|----|--|
| 06 | 01 | The high school will assess the academic progress of students in a variety of ways so that a clear and valid picture emerges of what they know and are able to do. |
| 03 | 02 | Experiences in high school will acknowledge multiple talents and ways of learning to help students achieve the meaningful success that leads to further achievement. |

Student Presentations or Exhibitions

- | | | |
|----|----|---|
| 02 | 03 | Teachers will be adept at acting as coaches and facilitators to promote more active student involvement of students in their own learning. |
| 03 | 04 | The school will accord meaningful roles in the decision-making process to students, parents and members of the staff to promote an atmosphere of participation, responsibility and ownership. |
| 02 | 07 | Teachers will integrate assessment into instruction so that assessment does not merely measure students, but becomes part of the learning process. |

These recommendations all point to the need for ongoing discussion and experimentation as each student learns how to gather information, weigh options, make choices, and move purposefully toward graduation and beyond. Improving learning requires change in all the factors that influence learning. As the workshop begins, plan to ask yourself, “*What will I do differently at school in order to increase personal engagement among students?*” Personal Learning Plans, portfolios, and presentations can open a wide range of new opportunities.

Assumptions about change teams

Like other *Changing Systems to Personalize Learning* workshops, this workshop is designed on the assumption that teams of teachers, administrators, students, and community members *working together* have the best chance of developing programs that engage all students in learning. It also reflects the assumption that leadership during change is a collaborative enterprise which may begin with a small team, but which must grow to engage the entire school community.

For people who are accustomed to working in a narrow framework—a classroom, department, office, or service center—working on a larger scale may seem daunting. Team leadership itself is a challenge because ideas that prove most workable often emerge from extensive dialogue among people who hold differing views. Teams have no formal authority. They achieve results by creating a collective sense of purpose in which many individual efforts gain increased importance. At this point, your group may not be a team at all. The workshop is designed for *team building*—a process that may be practiced here but must also be replicated among members of the school community who are not present.

Helping others adapt to ideas that seem foreign or impossible is the main task a change team faces. This workshop is based on the assumption that an organized discussion among people who share a concern for engaging students in learning can evolve into a school-wide process of experimentation and refinement. It is designed to help teams develop a pathway toward a destination that is not clear at the onset, but that grows increasingly clear as the team works together toward new ideas and strategies for change.

OVERVIEW OF TEAM DISCUSSION PROTOCOLS

The workshop is based on a series of discussion protocols that teams can use to achieve consensus around the five Key Dimensions. Each section ends with the challenge of “Going Public”—converting your ideas and conclusions into a form that may persuade others.

Key Dimension #1: Purpose

Protocol #1: Identifying a Shared Vision for Student Learning

Protocol #2: Ranking Priorities in Program Development

Protocol #3: Using NASSP *Breaking Ranks*™ Recommendations to Reflect and Revise

Going Public: Asserting a Purpose for Personalized Learning

Key Dimension #2: Organization

Protocol #4: Environmental Scan: Looking for Constraints and Opportunities

Protocol #5: Adapting Systems to Allow Growth

Going Public: Organizing a Project to Grow

Reflective Interlude

Protocol #6: Chalk Talk

Key Dimension #3: Content and Process

Protocol #7: Focusing and Defining: Three Options in Personalized Learning

Protocol #8: Practicing Mapping: Dialogue and Search for Learning Options

Protocol #9: Personal Learning Plans: Sketching a PLP Sequence in the High School Years

Protocol #10: Team Consensus: Issues in Portfolio Planning

Protocol #11: Portfolio Content: Seeking Artifacts From Academic Courses

Protocol #12: Preparing for Student Presentations

Going Public: A Graphic Representation of Parts Creating a Whole Process

Key Dimension #4: Assessment

Protocol #13: Assessing Performance: Designing a Rubric for Student Presentations Across Subjects

Protocol #14: Assessing Program Development: Tracking Incidents Toward Program Adaptation

Going Public: Selecting Indicators of Progress in Program Development

Key Dimension #5: Leadership

Protocol #15: Discussion of Leadership Across Organizational Boundaries

Protocol #16: Strategy Development: Preparing the Whole Community for Systemic Change

Going Public: Leadership Through Action Planning

Final Reflection

Five-minute “Freewrite” on Change

Getting Started

Facilitator's guidelines are provided throughout to enable schools to conduct this workshop on their own. If you prefer to have assistance with facilitation, or have any questions about the workshop, please contact Joe DiMartino, director of the Secondary School Redesign program of The Education Alliance at Brown University, 800-521-9550 ext. 235.

FACILITATOR'S GUIDELINES

Time	Activity & Description	Materials
WORKSHOP TOTAL HOURS: 10+	<p>Preplanning with Participating Teams: The workshop activities included in the guide would take more than ten hours of workshop time, at a minimum. Consequently, it will be important to design a series of activities that fit the needs and hopes of the people who will attend. Teams just beginning to personalize their schools may want to focus on purpose and content. Teams at a later stage may want to concentrate on a specific program component and the assessment process. The activities are designed to be flexible, but they are also sequential. As you select a series of steps for your workshop, you will also need to include the explanation of how you have designed the time.</p>	<p>Workshop Guidebook</p> <p>Chart paper & markers</p>
15 minutes	<p>Introductions: Personalized Learning–Hopes for the Day Briefly introduce the purpose of the workshop: to prepare high school teams to introduce a plan for personalized learning in their high schools. To help focus the workshop, ask each individual to introduce her or himself with a brief explanation of hopes or desires for the day. If teams have already been formed, ask each team to assemble a collective version of hopes for the day.</p> <p>Facilitators may create ground rules as they choose. One approach would be to create a cluster map or “mind map” on the board, with Personalized Learning in the center circle. Then, arrange team purposes in surrounding circles until all team (or individual) purposes are represented. The cluster map of hopes can allow the facilitators to talk about the scope of the workshop in relation to different kinds of team purpose, stressing the need for adaptation to the needs of schools or people.</p>	<p>Cluster map on newsprint</p>
5 minutes	<p>Overview: Developing a Proposal for Personalized Learning This workshop is designed to help individuals, schools, or teams develop a proposal for a personalized learning project or program within their school. Explain the five parts of the workshop (p. 9-11) and how they will help teams or individuals design a strong proposal for a particular approach to personalized learning in their schools: purpose, organization, content and process, assessment, and leadership.</p>	<p>Workshop Guidebook</p>

Getting Started: Continued

Time	Activity & Description	Materials
5 minutes	<p>Overview, continued</p> <p><i>Purpose:</i> a collective rationale for a personalized approach</p> <p><i>Organization:</i> an explanation of how the new program fits within school structure</p> <p><i>Content and Process:</i> materials that show how the program will work and what it will include</p> <p><i>Assessment:</i> a description of outcomes and how they will be assessed</p> <p><i>Leadership:</i> a description of roles individuals will take in moving the idea forward</p> <p>This workshop has been organized based on an inquiry method of learning—it is about asking questions and collectively exploring possible answers to those questions. The success of this workshop and each individual's experience here depends upon participants' willingness to ask questions, share ideas, and be reflective. The success of personalized learning really depends on tailoring the program to the community in which it will exist.</p>	Workshop Guidebook
20 minutes (option)	<p>Discussion: What is personalized learning?</p> <p>Ask individuals to scan the introductory pages on Personalized Learning and to select one quotation that seems to reflect the purpose they brought to the workshop (p. 13-20). Ask individuals to read the quotation they have selected and connect them to their purpose. Continue discussing quotations and connections until a full picture of personalized learning has come into view. Attaching key words to the original cluster map can help make the connection between purposes and the character of personalized learning.</p>	Workshop Guidebook

Personalized Learning

Planning to Meet Personal Aspirations and Common Standards

In this workshop, personalized learning refers to processes schools can develop to help each student create and pursue an increasingly clear purpose for learning throughout their high school experience. The workshop includes three components of an action planning process that students and their teacher/advisors can use to set their own courses for personal development and academic achievement:

Personalized Learning

- 1) **Personal Learning Plans:** Students and their advisors regularly assess student strengths, interests, and recent achievements so they can plan further learning activities that challenge students to achieve more.
- 2) **Portfolios:** Students collect evidence of their learning from classes and field experiences that show they are moving toward their goals and meeting the expectations of their school.
- 3) **Student Presentations (or Exhibitions):** Students explain the meaning of their work to a gathering of parents, friends, teachers, and advisors—receiving feedback on their progress and ideas for new investigations.

The success of personalized learning depends directly on the guidance of a caring adult—a teacher who meets regularly with the student to adapt plans, reflect on portfolio pieces, and prepare for assessment. Creating the time that advisors need to work closely with a small number of students may be more challenging than designing a personalized learning program, as discussed in the *Changing Systems to Personalize Learning* workshop, “The Power of Advisories” (Sinner, 2002).

Connecting a personalized learning program to academic course assignments is also challenging. To some extent, the success of personalized learning at the high school level also depends on related *personalized teaching* in the classroom. A good number

of classroom strategies have been developed to help students use academic knowledge to solve the problems they face or to realize their own ideals:

Personalized Teaching

Cooperative learning	Problem-based learning
Socratic seminars	Project-based learning
Critical thinking instruction	Place-based learning
Writing to learn	Science/technology/society
Project exhibitions	Simulations/net search
Service learning	Work-based learning
Differentiated instruction	Distance learning

Each of these teaching techniques helps students clarify their goals and gather “products” they can include in their portfolios to demonstrate proficiency during presentations or exhibitions. In short, they provide content for the process of personalized learning. Linked to personalized teaching, personalized learning prepares each student to set his or her academic direction and gather the knowledge and skills that can make his or her hopes a reality. The *Changing Systems to Personalize Learning* workshop, “Teaching to Each Student” (Worsley, 2003), has been designed to help your team reorient classroom teaching to individual needs.

This workshop will ask your team to consider opportunities for personalized learning throughout the four high school years. As your team begins, you may notice that team members have different visions for your school, that existing structures are not designed to support personalized learning, that members of the team have different projects in mind, or that new assessment plans interfere with existing practices. Work to build consensus within the group about essential features of the projects you will take back to your school. You will not design a perfect program at this point. You may, however, design a coherent beginning that others in your school can help you build on and refine.

The purpose of the workshop is to help your team develop a presentation about how personalization can improve teaching and learning at your school, and how it can be introduced and developed to make a difference in the lives of students and teachers.

FIVE KEY DIMENSIONS SUPPORTING PERSONALIZED LEARNING

The *Changing Systems to Personalize Learning* workshops are organized so school development teams consider five basic dimensions in which change has to occur for an initiative to prove successful. The five Key Dimensions have a logical order, working from purpose to structure to content to assessment of outcomes—with leadership a constant concern. The order of these five steps, however, is actually deceptive. Your team may discover while working on “assessment,” for example, that the “purpose” for personalization has shifted. Or, you may discover in talking about “leadership” that you have overlooked an entire group of teachers and you have to revise “content.” The workshop will help you focus on all five Key Dimensions in order, but your team may well bounce back and forth to make the parts consistent with each other. Coherence is the key to success with a personalization plan.

Key Dimension #1: Purpose

Personalized learning initiatives need a clearly defined purpose for members of the whole school community to use in explaining or assessing the program. The purpose also determines a great deal of the organizational structure used to grow and sustain the program. Many strategies exist for managing personalized learning, but a school and its faculty must either choose or design the approach that fits its purpose. Notice the variety of purposes a school might adopt to drive its personalized learning program:

- To teach research skills
- To engage students in community service
- To teach the value of life-long learning
- To increase college application rates
- To improve student self-concept
- To teach students to solve problems
- To test the application of academic knowledge

Each of these purposes could be legitimate in a school, but each requires a different kind of approach. Failing to specify a clear purpose can lead to confusion, frustration, and discord. This segment will ask your team to determine a clear purpose (that may be changed back at school) so that program design will be coherent and comprehensible.

Key Dimension #2: Organization

Personalized learning that is not well organized can prove dissatisfying for students, teachers, and administrators. Two kinds of organization are necessary to the development of a successful program:

- 1) **Structures** within the school organization that give the program a home base and attract the support of other parts of the organization;
- 2) **Outreach** to parents and community members who will play key roles in supporting personalized learning.

Several factors affect the design of personalized learning organizations: the number of teachers and students; the number of settings in school and community necessary to success; the readiness of teachers and administrators to play support roles; and the readiness of students to take responsibility for their own learning. This segment will ask your team to sketch aspects of an organizational plan that can give your project a reliable starting point.

Key Dimension #3: Content and Process

The “content” of personalized learning can vary completely. Indeed, variety signals the diversity of interests that characterizes high school students. Even if a school does not plan to include PLPs, portfolios, and presentations in its personalized learning program, three questions still need to be addressed:

- 1) How will students use their experience and classroom learning to aim their efforts at their hopes after graduation?
- 2) How will students accumulate evidence that they are exploring their goals and making progress toward their hopes—as well as toward applicable standards?
- 3) How will students represent their learning to adult members of the school, as well as to college admissions counselors and employers?

Advisory meetings, advisory classes, internships, service learning, dual enrollment in college courses, independent studies, senior projects, practice, and exhibitions can all play a part in process and content development. This segment will ask members of your team to specify the “contents” of Personal Learning Plans, portfolios, and presentations, and define the processes students will use to assemble them.

Key Dimension #4: Assessment

Well-designed assessment can guide the student through the process of learning. It helps both students and advisors assess progress toward goals set for student work, lets each student know where he or she is along the path toward graduation, and allows program developers to examine the problems that develop as a personalized program takes shape. Here are some questions to consider as you design the assessment component of your personalized learning program:

- 1) **Main question:** Does personalized learning improve student performance?
- 2) **Engagement:** Are students engaged in exploring their options and making appropriate choices?
- 3) **Documentation:** Do student artifacts reflect the path of student development in terms of skills and knowledge, as well as personal clarity?
- 4) **Presentation:** What standards will be used to assess student work? What criteria? What process?

A school leadership team may make a good start on assessment, but the process is likely to evolve considerably with experience. This segment of the workshop will ask your team to identify indicators of success for parts of the process, and for the project as a whole—with a plan for feedback on the project for the school community.

Key Dimension #5: Leadership

Personalized learning often begins with a few energetic advocates in the school and its community. Very quickly, however, leadership functions expand, often far beyond the limits established by school norms. Leadership teams need to initiate activity at six levels of organization:

- 1) **School policy:** Rules and guidelines that govern school life;
- 2) **Existing systems:** Administrative structures that organize the school day;
- 3) **School organization:** Existing distribution of resources and responsibilities;
- 4) **Faculty readiness:** The expectations that professionals and support staff have for their roles;
- 5) **Parent acceptance:** The readiness of parents to increase their roles in student learning;
- 6) **Student engagement:** The mindset of students who may be unfamiliar with personalized learning or who may habitually resort to passivity in school.

The success of personalized learning depends on supporting the evolution of ideas across the whole system, expanding leadership from formal roles that work in conventional high schools to newer roles that support student and faculty leadership. Formal leaders—department chairs, principals, and superintendents—make a critical difference in program success and failure. But the ongoing, informal leadership of teachers, students, and parents drives the process of change. Within the teaching profession, leadership is essential to all change. This final segment will ask teams to consider leadership roles that expand beyond classroom teaching. As your project develops, you may find that you turn regularly to your team for advice, feedback, and encouragement.

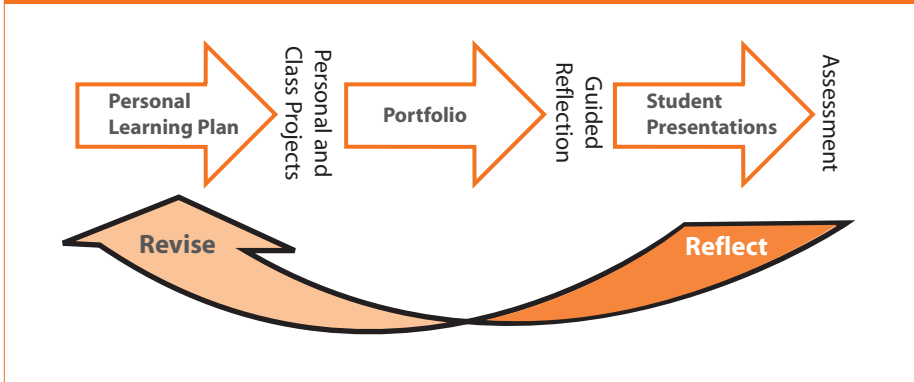
WHAT IS PERSONALIZED LEARNING?

Personalized learning occurs when high school students assess themselves and their community in order to design learning opportunities that fit their own aspirations, talents, and interests—while they also gather evidence to show that they are meeting academic expectations. Although many classroom practices may prepare students to describe a situation, define problems and opportunities, weigh available options, make a careful plan, gather information, or assess results, the subject of personalized learning in this workshop is the **individual student**—past, present, and future. Personalized learning in this framework surely includes gaining subject area knowledge, but the three phases in this workshop all aim to **increase student control over the process of their own high school education as a whole**:

- 1) **Personal Learning Plan** (or, Personal Plan for Progress): A flexible outline for learning managed by students, parents, and advisors to guide student inquiry over four high school years.
- 2) **Portfolio**: A collection of student work and reflections organized to show progress toward student goals and school standards or expectations.
- 3) **Student Presentation**: A meeting of parents, teachers, and friends at which students demonstrate their learning, reconsider their purposes, and examine new options.

Together, these basic components make up the essence of personalized learning as a method of increasing student control over the direction of their studies.

Personalized Learning



Theory and research behind personalized learning

Personalized learning is emerging as a response to two notable features of the current high school experience: student apathy and dropout. As schools raise the stakes on test scores and high school completion, many students react negatively to the pressure to perform up to social expectations.



Many students see high school as an impersonal experience, forced upon them by an uncaring world at the very moment in their lives when they begin to imagine their independence and yearn for opportunities to expand and express their own talents. Others may think that high school is designed to favor people with particular talents they do not have or currently want to have. Schools emphasize uniformity; the students want to develop a unique identity. Strife is inevitable, except perhaps for the minority of students whose families can assure them that conformity will bring future rewards.” (Clarke, 2003)

Students are more likely to drop out of school or drift through the years when they feel alienated from the people and processes that organize academic learning.



In what they call their “most important finding,” Lee and Burkam discovered that students from poor, disadvantaged families and neighborhoods are likely to stay in school when they perceive their interactions with teachers and administrators as positive. Exit interviews with dropouts indicated that half decided to leave schools because they didn’t get along with teachers and other students. Many said their teachers didn’t care about them, weren’t interested in whether they succeeded or failed in school, and weren’t willing to provide extra help even when asked.” (Black, 2002)

No amount of structural change can obviate the need for teachers who care about their students and enjoy watching each of them succeed. Dropout rates of 30% or more in any cohort of high school students prevail across the country, accompanied by an indeterminate number of “droopouts,” students who may remain in school but still put little effort into learning (USGAO, 2002).



Too many kids don’t see a connection between their efforts and school success, don’t know what it is they need to practice, can’t imagine themselves ever being academic and have never seen academics played.” (Meier, 1995)

Given the disconnect between schools and societal conditions, the disengagement of young people from their education is a serious problem. In a 1994 national survey, nearly 40% of more than 20,000 high school students of all backgrounds admitted that they were “just going through the motions” in school (DiMartino, Clarke, & Lachat, 2002). Academic classes arranged to reflect the structure of subjects may not reflect the experience, interest, needs, talents, or aspirations of all students who come to high school.

Facing obscure academic expectations, many students adopt attitudes that nicely reflect their age and temperament; they grow either increasingly passive or increasingly rebellious, responses that do little to improve their educational attainment. In the first publication of *Breaking Ranks*[™], NASSP called for a reversal of the trend toward large comprehensive high schools, where students are sorted by test scores or grades into tracks that may bestow some status, but offer little personal identity.



*If one theme could be extracted that is overarching and paramount, it is a message that the high school of the 21st century must be much more student-centered and above all, much more personalized in programs, support services, and intellectual rigor. These seven recommendations are illustrative of what we envision: Every student will have a personal adult advocate; the Carnegie unit must be replaced or redefined; student anonymity must be banished; teachers should meet no more than 90 students per day; every student should have a Personal Plan of Progress; imaginative flexible scheduling must be the order of the day; every principal and teacher will have a Personal Learning Plan.” (NASSP, *Breaking Ranks*TM, 1996)*

Personalized learning implies an ideal: individual students pursuing personal plans supported by a caring teacher who helps them through a series of increasingly challenging tasks toward a future that grows increasingly clear with each success. Using knowledge to gain personal power is not a fresh idea.



Empowerment in this spirit is less about preparing youth for tomorrow and more about equipping them for engagement, connection, and contribution today.” (Scales & Leffert, 1999)

Educators and parents, as long-term partners of the learner, need to build relationships to become better listeners and facilitators of learning grounded in and motivated by learners themselves. The central component of those new relationships is a continuous open dialogue about learning and growth.



The structure of schools must change in order to allow the time and support for such dialogues to evolve in order for all students to become more engaged and successful in learning.” (Friedrichs & Gibson, 2003)

Connecting each student to a caring advisor who will stay connected long enough to understand student aspirations and talents is critical to the success of personalized learning.

“*The atmosphere must allow the adults the time and support to focus on students as people who have promising hopes and aspirations, even if those are veiled or hard to draw out. The adults need to believe deeply that in those hopes lies all motivation for learning and that by attending to aspirations, teaching becomes ever more powerful. In addition, the adults need a personal toolkit of their own that helps them develop the sensitivities, responsiveness, and vocabulary of personal learning.*” (Friedrichs & Gibson, 2003)

Successful personalized learning

Personalized learning is not a notable feature at most high schools, but many personalized schools have emerged in the last decade to give us a sense of how they may work. At the Metropolitan Career and Technical Center in Providence, Rhode Island (the Met), virtually all learning is personalized.

“*‘One student at a time’ is the Met’s mantra, and the school acts on it with remarkable consistency. Their first step is creating small schools and small classrooms. Currently they have two schools, each with 110 students, eight teachers, a director, a workplace coordinator, and other administrative and specialty staff. One school is located on the fourth floor of a downtown office building, and the other is two miles away in a new school building.*” (Levine, 2002)

“*At the Met, students work daily with an advisor to reflect on their academic work, plan new challenges, and gather up evidence from their advisories and internships to show that they are moving toward their goals. They may come from poor neighborhoods or distant countries, but about 95% of Met students complete their diplomas and 95% go on to college.*” (Steinberg, 2001)

For more than 20 years, the Coalition of Essential Schools has promoted the development of small, personalized schools in the pattern that currently underlies personalized learning. Souhegan High School in Amherst, New Hampshire adopted student-centered, or “authentic,” learning, early on the road to membership in the Coalition of Essential Schools. “Authentic relationships with teacher ‘mentors’ and ‘coaches’ also fostered authentic learning for students,” writes the principal who led the change.

“*Learning became more than a paper/pencil exercise; it became a human dynamic where teachers confidently called upon students to become “workers” and to demonstrate publicly, in front of both faculty and student peers. All students were expected to show that they truly knew something—that they could talk about a physics concept, or do a mathematical exercise, or understand the meaning of a particular poem. Acquiring the ease and skill to perform or “exhibit” in regular and routine ways was a direct result of feeling cared for and supported.*” (Mackin, 2003)

When New York City replaced the comprehensive, 2,000-student Julia Richmond High School with six small schools designed on Coalition principles, the Coalition Campus Schools Project (CCSP) compared measures of success for the original comprehensive school (1992-1993) with the same measures for the six smaller, personalized schools that replaced it (1995-1996). The results were startling:

Student Outcomes	Julia Richmond High School	CCSP Average
Average daily attendance	72%	86.2%
Incident rates (disciplinary)	3.3	1.2
1 year dropout rates	6.1	1.2
Students with reading gains	52.4%	56.9%
11 th grade passing RCT or Regents		
in reading	79%	80%
in mathematics	57.5%	76.6%
in writing	75.2%	71.4%
LEP students with adequate language gains	53%	91.2%

(Darling-Hammond, Aness, & Ort, 2002)

Similar results appeared when Valerie Lee and Julie Smith studied student achievement in nearly 800 high schools, some of which had begun the process of restructuring to personalize learning.



Effects (of restructuring high schools) on cognitive learning early in high school followed clear and consistent patterns. Students who attended schools with several restructuring practices learned more in mathematics, science, reading and history, whereas students attending schools without reform practices learned less.” (Lee & Smith, 2001)



Personalized learning is essentially active learning, organized to answer questions students recognize as important to their lives. Because students learn to gather information to solve problems they recognize in their own experience, personalized learning is often called “authentic,” mirroring the processes adults use to solve problems at work, at home, or in community. Guided by skilled teachers, students look carefully at what they know, generate questions or set goals, gather more information, then use critical thinking skills to propose solutions to an audience of adults and peers. In all these activities, the student is the center of attention, winning praise and eliciting advice from the students, teachers, parents, and community members who attend a presentation. Personalization is not the same as individualization. Personal learning requires the active direction of the student; individualization lets the school tailor the curriculum to scaled assessments of interest and abilities. The difference between individualization and personalization lies in control.” (Clarke, Frazer, et al., 2003)

High school students cannot perform as adults without a great deal of adult support. As *Breaking Ranks*[™] pointed out:

“*Each student needs to know that at least one adult in the school is closely concerned with his or her fate. The Personal Adult Advocate will be that person. The relationship between the student and the advocate should ensure that no youngster experiences the sense of isolation that frequently engulfs teenagers during this critical period of their lives. Having someone on his or her side can help a young person feel a part of the school community. Individual teachers, counselors, and other school personnel sometimes serve as buffers for students with whom they develop special rapport.*”
(NASSP, 1996)

Personal Learning Plans, portfolios, and presentations are often organized so students meet school-wide performance standards, but the products that result from their effort are always unique and highly personalized expressions of knowledge. Based on a shadowing study of students in eight New England high schools, two researchers recognized the power of the interplay between individual aspiration and social expectations or “standards.”

“*High schools that successfully personalize learning provide all students with a means of gaining acceptance from the school community, not for conformity with a norm, but for achievements that are unique, self-organized, and carried out independently, often with other students working as a team.*” (Clarke, Frazer, et al., 2003)

Personalization of learning allows different schools to achieve a unique character, as students interacting with their community present novel applications of their understanding. Working from the center of New England’s school accreditation process, Pam Gray-Bennett recognized the need to let schools grow in patterns already established in school culture.



Contrary to the trend by many state departments of education that all schools are alike and thus should all have the same goals, people in schools know that every school has a unique personality and culture, unique traditions, serves a unique community, and is peopled by students with unique needs. If schools are to work, then they must be built upon and celebrate their uniqueness. As such, all change must be based on personal, school-specific need.” (Gray-Bennett, NEASC, 2003)

With the protocols that follow, your team may begin to plan for the development of personalized learning at your high school or expand personalized learning options that already exist. Personal Learning Plans, portfolios of student work, and presentations or exhibitions of learning and reflection—guided by a skilled teacher—are options to consider, not requirements. Some schools do not sponsor Personal Learning Plans, but rely instead on portfolios guided by advisors and presentations developed for specific classes. Others begin with PLPs alone as part of student support services. Others use senior projects and other presentations to mark important transitions in the learning process. The programs you develop should fulfill the purpose you set for them during the first segment of this workshop. In the exercises that follow, all planning steps should support the statement of purpose your team develops to guide its work.

Key Dimension #1: PURPOSE

Time	Activity & Description	Materials
5 minutes	<p>Key Dimension #1: Purpose</p> <p>Begin this segment by explaining how shared purpose within any team or school becomes the essential ingredient for success in program development. High schools are commonly organized around differences: subject area, grade level, and building geography, for example. Structuring high schools around differences often obscures the shared purpose that makes any group work successfully. Key Dimension #1 aims to help a team discover its shared vision for student learning to guide program design and the project proposal.</p>	
30 minutes	<p>Protocol #1: Assembling a Shared Vision for High School Learning</p> <p>With Protocol #1 in view, ask individuals to “freewrite” for three minutes about their vision for student learning in their school. You can use the following lead-line to make sure people write ideas that are roughly comparable:</p> <p><i>My high school is a place where students _____</i></p> <p>After the freewrite, ask individuals to form groups or teams. Then, ask people within their teams to form groups of two. Each person should read what he or she has written. The groups of two should write down words or phrases that represent shared beliefs about student learning. After ten minutes, ask groups of two to read their lists of shared beliefs to the whole team, while a recorder lists them on a sheet of large newsprint. From the list of beliefs, the recorder or group facilitator can write down ideas that are common to all the groups of two, adapting the language as necessary. In the final phase, group deliberation, rather than the original lists, should guide the team toward consensus. The graphic guide on p. 25 can help the facilitator separate individual beliefs from consensual beliefs.</p> <p>Vision statement: Ask a volunteer from each group to write a paragraph from the final list of beliefs.</p>	<p>Newsprint</p> <p>Protocol #1</p>
20 minutes	<p>Protocol #2: Sorting and Ranking Priorities</p> <p>Explain how different approaches to personalized learning serve different purposes. Setting priorities for a personalized learning program involves focusing effort on a relatively narrow band of purposes that will then guide the team through program (continued)</p>	<p>Protocol #2</p>

Key Dimension #1: Continued

Time	Activity & Description	Materials
20 minutes	<p>Protocol #2, continued</p> <p>design. As explained in Protocol #2, you can ask individuals to select 10 priorities from the list. Then, each team should deliberate to define a list of ten or fewer priorities it would like its program to serve. Finally, with their ten priorities in view, team members can try associating each priority with one of the three main strategies for personalized learning, PLPs, portfolios, or student presentations. The distribution of priorities in the three columns can help the team decide how to focus its effort.</p>	Protocol #2
20 minutes (Option)	<p>Protocol #3: Using NASSP Breaking Ranks™ Recommendations to Reflect and Revise</p> <p>Sometimes, an external perspective can help a team adjust its aim to fit the situation faced at home. Protocol #3 asks the team members to compare the importance of different approaches to personalization to their understanding of current practices in their school. Each individual should score the school for both “importance” and “current practice,” then estimate average scores for the whole team. In general, large gaps between “importance” and “current practice” indicate a high priority need.</p> <p>Ask the team members to reflect on the gaps in their scores to see whether adjusting the priority list from Protocol #2 might focus the team more directly on school needs.</p>	Fresh copy of NASSP Recommendations Protocol #3
20 minutes	<p>Going Public #1: Asserting a Purpose for Personalized Learning</p> <p>Each team should now have the essential elements of a purpose statement: a vision for student learning, a list of priorities for program development in three (or fewer) categories, and a rough estimate of the need at their school. A courageous scribe can write up a purpose statement including all three elements.</p> <p>Asking the team to present its purpose statement to the whole group can clarify communication issues and help with final revision.</p> <p>Ask each team to read the purpose statement to the group. Then, seek:</p> <ul style="list-style-type: none">Warm feedback: passages that seemed clear and powerfulMisty feedback: parts that seemed confusing or contradictory	Newsprint Going Public #1 Worksheet

Key Dimension #1

The Purpose of Personalized Learning Options

For any team to work effectively, its members must share a sense of a common purpose that holds the group together. Because high school practices accentuate distinctions among educators—by department, grade level, and content orientation, for example—extensive dialogue may be required for any team to discover the ideas shared across existing boundaries. This segment of the workshop consists of the following three protocols your team can use to reach agreement on a purpose for personalized learning in your school:

Protocol #1: Assembling a Shared Vision for High School Learning

Protocol #2: Sorting and Ranking Priorities

Protocol #3: Using NASSP *Breaking Ranks*™ Recommendations to Reflect and Revise

As a result of dialogue in exercises such as these, the workshop will help you prepare to “Go Public” with your proposals and guide your school faculty and staff through a similar process of discussion and decision-making. Writing a declaration of purpose after completing these exercises will give you a foundation for making the many decisions that will define your program.

In light of the boundaries that divide educators, we need to search out the shared beliefs that can unite a school behind a common commitment to personalized learning. When Souhegan High School began to move from conventional programming to a personalized format, the school community spent months identifying the beliefs it would use to set directions in all areas of school life.



At the very root of Souhegan’s reform efforts was a set of beliefs that it sought to embed in all of its practices. The first belief was that a humane, caring, and personalized school—a place where all students were welcomed, were known well, and were heard, and consequently, a place where all students felt a stake in the institution, not simply in their own success—was central to fostering essential academic goals. Students learn to think best, to “use their minds well,” to try out ideas, to express their views, to interact in

teams, and to absorb themselves in a dynamic learning process in an environment where they feel trusted, respected, and encouraged.” (Mackin, 2003)

Getting the purpose straight has been essential to statewide, as well as school-wide, personalization. The state of Maine gathered educators from many backgrounds to set out a few principles to guide high school personalization. As a member of that early effort has written:

“ *Our Commission could, too, have traveled into that maze of prescriptions and structural solutions. But something—we believe it was largely the presence of students and teachers on the Commission—saved us from this fate. In its place, we created a vision for Maine high schools that seeks to ensure personal attention and a personalized learning experience for every Maine youth.*” (Donaldson & Marnik, 2003, of Maine’s *Promising Futures*, 1998).

Promising Futures has become the foundation of a statewide personalization initiative, funded by the Bill and Melinda Gates Foundation.

Protocol #1

Identifying a Shared Vision for Student Learning

What vision do you hold for student learning at your school? What aspects of that vision make you unique? What aspects are shared with others on your team? Your unique and distinctive qualities make you important to school activities that depend on many different kinds of talent. The shared aspects of your vision make you an important part of a team.

The first part of the investigation of purpose will start with an exploration of what you believe about how learning should occur in your school. Then, in dialogue with others on your team, you can begin to identify commonalities that can hold the team together. Finally, you can identify the elements of a shared vision for your team that you develop into a paragraph—a “Vision for Learning at Your High School.” Other protocols in the exploration of purpose will take you further and further into specificity. As that occurs, you can use your vision statement to make choices among the many options that define personalized learning.

The vision statement protocol has four steps: Step 1: Freewrite; Step 2: Shared and Distinctive Beliefs; Step 3: Team Beliefs; and Step 4: Belief Statement.

Step 1: Freewrite

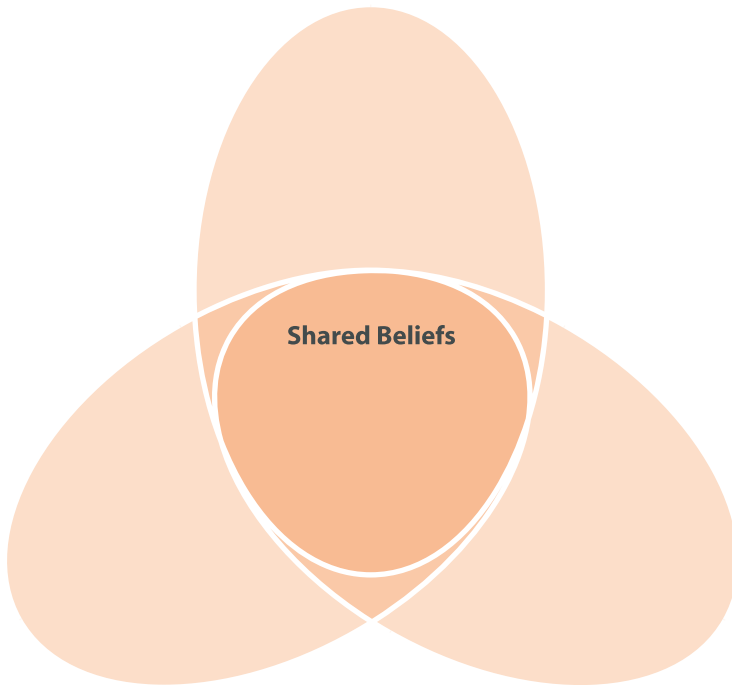
What is your hope for learning at your school? In a freewrite of three minutes on a blank piece of paper, write as much as you can on the following probe:

In my vision, my high school _____ is a place
where students...

Step 2: Shared and Distinctive Beliefs

(Groups of three) How much of what you believe do you share with others? The Venn diagram below can help you identify shared beliefs from your freewrites and list a few that are common to all. You do not need to stick to the wording of your freewrite. In fact, this exercise is actually a search for language that can capture the ideas shared by all three members of your group, so you may see your words merge with other words as the discussion continues. At the end, your group should be able to agree that the words at the center of the three circles represent your shared hope for learning at your school.

Name: _____



Name: _____

Name: _____

Step 3: Team Beliefs

Using the lists of shared beliefs and a blackboard or newsprint to gather ideas, ask a facilitator to help assemble a single catalogue of beliefs for the whole team. Go for consensus—meaning that the team should work on each item until the wording is acceptable to all, even if not perfect.

Step 4: Belief Statement

Ask a sub-team (or courageous individual) to write a paragraph that includes all the words on the newsprint and expresses the shared conviction of all members.

Protocol #2

Ranking Priorities in Program Development

In light of the vision you have assembled for your school, what role might personalization play in realizing the shared vision of your team? As you can see in the list below, Personal Learning Plans, portfolios, and presentations are being used to serve a wide variety of specific purposes. No personalization strategy can serve all the possible purposes. To make a program work, each team needs to identify purposes that are consistent with its shared vision, then link them to a strategy that fits: PLPs, portfolios, or presentations.

Protocol #2 asks each team member to sift and sort 25 different purposes for personalized learning to identify those that are most consistent with the vision statement the team has developed. Then, the team can assemble a list of the priorities it wants to serve as it begins to personalize learning. Personal Learning Plans, portfolios, and presentations might all be central to the vision. On the other hand, the purposes your team selects may require only one strategy, adapted to fit your own needs.

The box below contains a variety of purposes that personalized learning has served in different high schools.

Purposes for Personalized Learning

- | | |
|---|---|
| To increase student motivation | To banish anonymity from school life |
| To guide course selection | To clarify graduation requirements |
| To help students imagine their future | To plan a path after high school |
| To connect families to student learning | To connect academic and applied learning |
| To celebrate student achievement | To prepare for college applications |
| To connect each student with a caring adult | To promote reflection and reevaluation |
| To relate student work to standards | To assess basic skills (speaking and writing) |
| To explore non-curricular options | To explore career choices |
| To support identity formation | To demonstrate personal talents |
| To initiate lifelong learning | To extend range of academic choice |
| To increase self-awareness | To evaluate content acquisition |
| To emphasize applications of knowledge | To legitimate non-school achievements |
| To assess progress toward standards | |

Using the following steps, put the purposes in a category that seems to fit best: PLPs, portfolios, or presentations. Select 10 priorities individually, and then compile a team list consisting of shared priorities.

Step 1: Selecting essential purposes

Each team member should select fewer than 10 purposes that are essential to realizing the vision your team has developed.

Step 2: Identifying team priorities

Working from one team member to the next, team members should explain their highest priorities. As purposes are proposed, a facilitator should develop a list, noting the priorities that are proposed by more than one individual.

Step 3: Selecting 10 or fewer

When all priorities have been explained, the team should work for a final list of not more than 10 priorities, rank ordered if possible. Haggling is inevitable. Work again for consensus.

Step 4: Fitting priorities to personalization options

Working as a group, assign each priority to one of the personalization options on the following page.

When your team's list of priorities is complete, place each team priority in one of the three categories in the following Personalized Learning Options chart, and rank order the purposes in each list so the lists reflect your own priorities.

Personalized Learning Options for Team Priorities

Personal Learning Plans	Portfolios	Student Presentations

Then, with the rest of your team, write a statement that expresses an agreed-upon purpose for designing a personalized learning project in your school.

Statement

Protocol #3

Using NASSP *Breaking Ranks*TM Recommendations to Reflect and Revise

After your team has come to some agreement on the general purpose of personalized learning in your school, it may be useful to check your ideas against an external framework.

The ranked lists of priorities that resulted from your dialogue are probably too numerous or difficult to take on all at once. How can you begin to organize the purposes you are exploring so they begin to shed some light on the process you will have to develop to engage your school community in personalizing learning?

Protocol #3 asks you and your team to separately assess the seven recommendations from *Breaking Ranks*TM (NASSP, 1996) that began this workshop, using the worksheet on the next page. In light of the discussion so far:

- 1) How important does each recommendation seem to your personalization initiative?
- 2) How far has current practice at your school taken you toward meeting the recommendation?

School development goals are often most powerful when the recommended change is seen by a team to be highly important, but seldom achieved in current practice. Goals that are important but already actively developing should be maintained at current levels of effort. Goals that are not too important but receive lots of attention in current practice can be considered for reallocation to new projects.

When your team has compared results, a few high priority goals may stand out among others. You can use these recommendations to identify specific goals for developing personalized learning at your school.

Worksheet: Protocol #3

Rate the importance and current practice of each NASSP recommendation to your school.

Personal Learning Plans

01 06	Each student will have a Personal Plan for Progress to ensure that the high school takes individual needs into consideration and to allow students, within reasonable parameters, to design their own methods for learning in an effort to meet high standards.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4
06 02	The school will review each student's Personal Progress Plan continually and indicate the extent of progress toward graduation and post secondary transition plans.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4

Portfolios

06 01	The high school will assess the academic progress of students in a variety of ways so that a clear and valid picture emerges of what they know and are able to do.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4
03 02	Experiences in high school will acknowledge multiple talents and ways of learning to help students achieve the meaningful success that leads	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4

Student Presentations

02 03	Teachers will be adept at acting as coaches and facilitators to promote more active student involvement of students in their own learning.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4
02 07	Teachers will integrate assessment into instruction so that assessment does not merely measure students, but becomes part of the learning process.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4
03 04	The school will accord meaningful roles in the decision-making process to students, parents, and members of the staff to promote an atmosphere of participation, responsibility, and ownership.	Importance? Low High 1 2 3 4	Current Practice Low High 1 2 3 4

High Importance/Low Practice: A school change priority is often *highly important* but *hard to detect* in current practice. Select the recommendations with the greatest gap so you can explain their importance to your team.

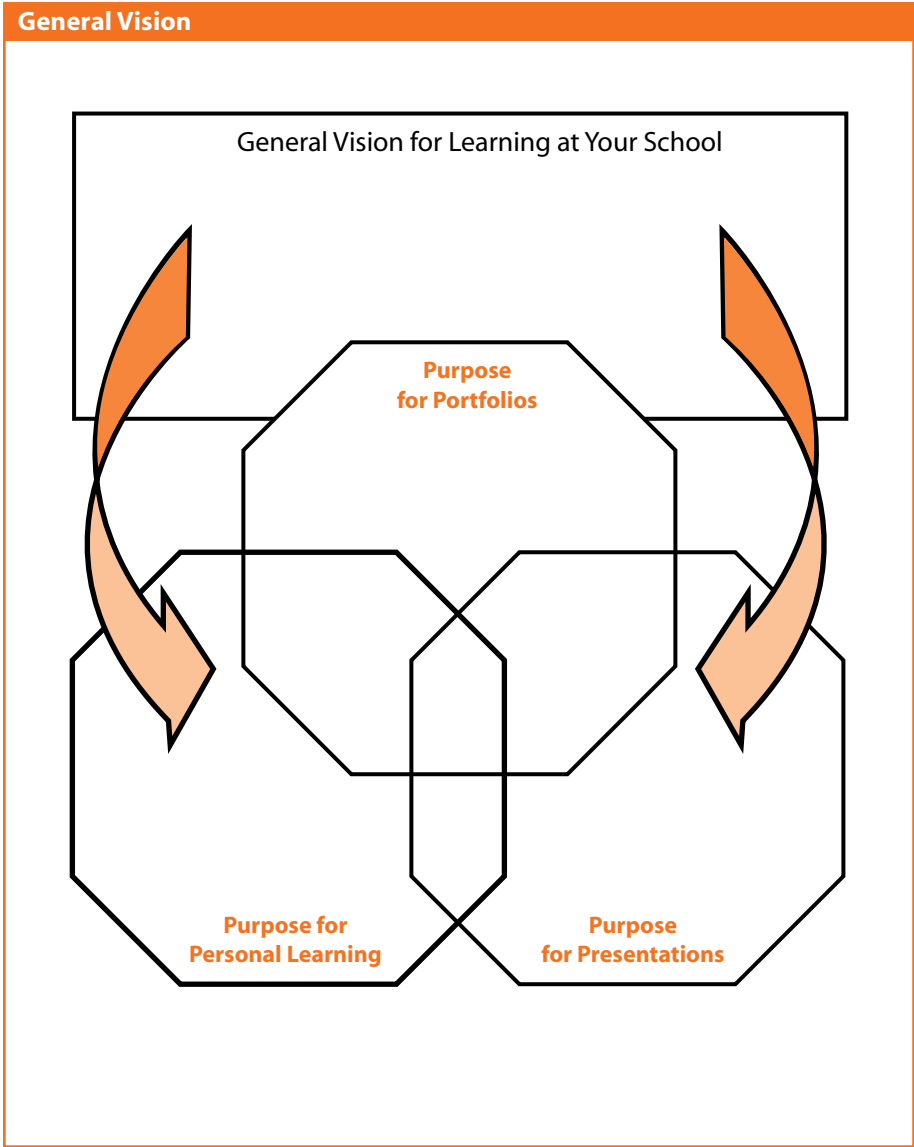
GOING PUBLIC IN KEY DIMENSION #1

Asserting A Purpose for Personalized Learning

Gaining consensus about vision, priorities, and goals within your team is an essential step toward designing a program that serves your particular school and students. Consistency among the parts proves persuasive to those who are not part of your team. The purpose for student presentations must also be consistent with both the portfolios and PLPs, allowing all three parts to work together on behalf of the overall purpose. At this stage, you may be ready to “go public,” not to lay down a path for others to follow, but to get feedback from people who did not participate in the process your team has completed. In fact, your team may need to replicate parts of the process back at your school in order to engage others in the enterprise you have begun to imagine.

The guide on the next page may help your team explain the relationship you want to develop between your vision statement and the priorities for program development you selected for personalization strategies such as PLPs, portfolios, or student presentations. In short, you and your team should now be able to assert a purpose for the personalized learning projects you want to develop. The graphic may help your team organize its purpose statement so it can be written and presented clearly and logically to the audience of educators and community members who choose to lend their own efforts to the personalized learning initiative.

As a group, describe the purpose you hold for personalized learning in general, and for as many of the three subcomponents that you plan to include in your program.



Key Dimension #2: ORGANIZATION

Time	Activity & Description	Materials
10 minutes	<p>Key Dimension #2: Organizing a Personalized Learning Project</p> <p>Explain that the purpose of organization is to place the program they are building into a school organization that is already fully committed to ongoing activity.</p> <p>Participants may comment that the program they develop should dictate the structure they design to sustain it. That's true. Working on organization at this point, however, can give them a sense of how their ideas fit with existing structures in their school—and who they will have to engage in order to make the project work. Let the group know that they may find themselves adjusting their purpose based on what they discover about organization. The same kind of revision may be necessary as they start program design and then discover they have missed an important part of the school organization.</p> <p>This section of the workshop asks participants to think about how their new program will connect to the rest of the school organization. In addition, it raises the question of size. Will the program be large enough to change school culture? Will it be small enough to protect itself from criticism? In general, smaller programs are easier to institute but less effective in changing the student experience in significant ways. Starting small but aiming large depends on understanding how the school accommodates change.</p> <p>Overview: Tell participants that they can begin to organize their program by figuring out where in the school organization they can find natural allies and where they may find resistance. They can locate their program center in a place that offers support and protection, hopefully close to the mainstream of school life. Then, they can look at the remainder of the school to develop strategies that will engage others in the life of their program. Finally, the teams will distribute parts of the task of introducing the program and gaining acceptance throughout the whole system.</p>	<p>Workshop Guidebook</p>
30 minutes (option)	<p>Protocol #4: Environmental Scan: Looking for Constraints and Opportunities</p> <p>New programs destabilize existing programs even when distantly connected. Protocol #4 asks teams to list areas of school life in which reaction is predictable. Then, the team should discuss and list the concerns themselves. Will the project affect homework? Bus schedules? Students in the library? Class absences? Class length? (continued)</p>	<p>Newsprint</p> <p>Protocol #4</p>

Key Dimension #2: Continued

Time	Activity & Description	Materials
30 minutes	<p>Protocol #4, continued</p> <p>Not all concerns can be identified before the program is fully designed, but a provisional list can help the team see how its work will affect others. In a short discussion following Protocol #4, ask a few team members to explain the main concerns they faced and the steps they considered to engage others.</p>	Protocol #4
20 minutes	<p>Protocol #5: Adapting Systems to Allow Growth</p> <p>Protocol #5 extends the challenge of the environmental scan to the whole school organization. The protocol also asks teams to think about short and long-term strategies they can use to engage people scattered across the system. A short-term strategy step might be to call a meeting, visit an influential member of the community, or write a program overview. Longer-term strategies might include forming a steering group, seeking space, or writing a proposal to the school board. Again, you can remind the teams that their list of strategies may not be complete at this time, and that other ideas will be added during program design, assessment and leadership discussions.</p> <p>In general, it may be useful to let teams know that the five areas of school life identified in the chart are all important to program success—and that resistance at any level can shut down the process of growth.</p>	Protocol #5
20 minutes (option)	<p>Going Public #2: Organizing a Project to Grow</p> <p>The summary sheet asks teams to look at their list of tasks in relation to the three personalization strategies that are the focus of the workshop: Personal Learning Plans (PLPs), portfolios, and presentations.</p> <p>Again, teams may have to clarify and adjust their strategy steps in relation to each or any of these components. When teams have finished, you may want to remind them again that their tasks list will continue to grow throughout the workshop.</p>	Going Public #2 Worksheet

Key Dimension #2

Organizing a Personalized Learning Project

Comprehensive high schools are not well organized to support personalization. In virtually all high schools, resources have already been allocated to existing programs, and students, teachers, administrators, and community members have settled into conventional roles. Particularly in its beginning phases, personalized learning requires more organization than conventional teaching practice.

Since the purpose of personalized learning usually includes student self-direction, flexibility depends on a solid foundation of structure: guidelines, new roles, agreements, and procedures. Teachers or counselors who manage personalized learning need preparation, materials, experience, and time to reflect on what is working and what is not. The project must fit into the administrative structure so funding and support can be assured. Several questions may help your team outline the organization you think you will need to support teachers, students, and other adults as they create a personalized learning process:

1. Who will staff the program?
2. Where will the program “fit” in the existing structure?
3. What schedule would allow the program to succeed?
4. What processes will guide students and teachers through program development?
5. How will educators reflect and adapt the program to work better?
6. What administrative work will support ongoing activity and further development?

These are narrow questions, but they conceal a much larger issue: *How much of school structure must we change in order to realize the vision we have developed and the project plans we aim to propose?*

Looking at personalized high schools, one can easily sense the vast difference between schools organized to reflect academic disciplines and schools designed to support personalized learning. They don’t feel the same. They don’t look the same.

After shadowing students through a school day at a personalized school, a research team from Brown University noted the difference:

“ Upon entering personalized high schools, we saw students coming and going from internships in the community or community-based mentors and parents arriving for specific meetings with students and staff; community-centered learning creates access to multiple partners for inquiry and learning. We noticed students and teachers actively engaged in informal discussions in hallways and classrooms. These conversations were friendly and personable, but also learning-centered, probing issues and discovering options for students to explore.” (Clarke, Frazer, et al., 2003)

A different research team noted the large-scale change in school structure that allowed personalization to grow:

“ In the schools we studied, reform efforts that put students in the forefront, addressed core issues around teaching and learning, and involved implementing new structures to support changes in approaches (e.g., time for faculty collaboration, new faculty roles), have engaged staff in ways and over periods of time that less substantive reforms could not.” (Seager & Jorgensen, 2003)

Unless the system changes, new practices cannot survive for long. Dropped into a conventional setting, small personalization projects find themselves marginalized: they lack access to resources; they don't fit surrounding processes and expectations; they look strange; they lose track; they expire during the first round of budget cuts.

Structures are not removed from the learning they sustain. Like the learning process itself, surrounding systems and structures must be personalized in order to shelter and cultivate personalized learning.

“ As suggested by research on communal school models (Lee, Bryk, & Smith, 1993), we found that strong relationships between and among students and faculty were central to participants' views of what enabled

their success. Students often compared their school to a family and linked their achievement to their caring relationships with teachers. As one Vanguard [High School] student said, 'School should not be a mass production. It needs to be loving and close. That is what kids need. You need love to learn.' Another, who was eligible for the most restrictive special education setting, said about his experience at Vanguard, 'I was bad all the way back from elementary and junior high school. I would have got lost in the system. I would not have made it. I would have dropped out. I needed someone to be there to show they care about me for me to be motivated.'" (Darling-Hammond, et al., 2001)

Among personalized high schools, some have shed virtually all the paraphernalia of comprehensive high schools: classes, schedules, buses, time-out rooms, Carnegie units, and class rank. In schools such as the Met in Providence, close teacher relationships with small groups of students have taken the place of subject-area classes, discipline systems, and bell schedules.

“*Students [at the Met] are divided into groups of 14, known as an 'advisory,' which replaces the traditional classroom. A primary teacher or 'advisor' oversees their learning and generally stays with them for all 4 years of high school. The advisory is designed to be a small, supportive group of learners and an extended family in which all students feel well-known both personally and academically...The advisory system ensures that someone will always be there to help students work out problems. In most schools that is the role of guidance counselors, but they are usually responsible for hundreds of students. The Met believes that the trusting, day-to-day relationship that develops between a student and a caring advisor will lead to better solutions when problems arise. Advisors often serve as confidants, coaches, sounding boards, and intermediaries.*” (Levine, 2002)

Your team may not be able to predict with accuracy the structural changes needed to support your program ideas. However, you may be able to predict individuals' reactions when your ideas come into focus, and sketch the adaptations your school must make to give your project a start. With public education funding under

increasing pressure, we must avoid thinking that change depends on new money. Instead, change depends on adapting old structures to fit new opportunities. None of us can change structures single-handedly. Teams can do it, if they stick together and grow into the life of the school.

The protocols in this segment have been designed to help your team predict the constraints you will face when you introduce personalized learning at your high school and begin assigning roles to people who can work with the larger system to make room for your project. Some of those people are already on your team. Others have important roles at your school. Figuring out who needs to be engaged in the process is the task we face.

Protocol #4: Environmental Scan

Team members will describe from their personal perspectives the parts of the school organization where support is most needed.

Protocol #5: Adapting Systems to Allow Growth

The team will consider the whole system, from “top” to “bottom,” looking for constraints to be overcome and advantages to be exploited.

This segment of the workshop ends with a planning guide for project organization. As a result of working through these protocols, your team should be ready to figure out what to do to organize your personalized learning project. At this point, your aim and tactics will be shaky. As you design the project with Key Dimension #3: Content and Process, you will see other opportunities for organizing the project itself, as well as getting the system ready to accept your proposals.

Protocol #4

Environmental Scan: Looking for Constraints and Opportunities

Individual Notes

What aspects of your school's current organization may need attention as you begin to institute a personalized learning program? Each member should list concerns about parts of school organization that must adapt if the program is to succeed.

Group Notes (on newsprint)

Looking at the concerns that have been repeated by different members of your team, what concerns predominate?

Planning and Preparation

As you look at the concerns expressed by the whole group, what early steps should the team take to prepare the way for a personalized learning project?

- 1)
- 2)
- 3)
- 4)
- 5)

Organizational strategy

Before settling on a plan for organizing your personalized learning program, your team may want to check its priorities against a larger view of the school system at work.

- **Mission:** Some parts of conventional school systems try to balance community needs and school programs, often through the yearly budgeting cycle;
- **Systems:** Other parts of the organization aim to create the maximum level of efficiency and effectiveness in ways that affect time allocations;
- **Curriculum:** A large part of the school organization results from dividing content to create smaller departments with narrower purposes;
- **Teaching:** Departments and faculty may organize their courses around a narrow range of academic subjects or skills;
- **Advising and Mentoring:** Meaningful contact between students and teachers may result largely from relationships established in class, without a formal purpose or reliable process;
- **Learning:** Students have their own priorities and habits, including sports teams, dance classes, and jobs, which may affect scheduling during the day.

The next exercise, Protocol #5: Adapting Systems to Allow Growth, asks your team to compare your concerns to a list of factors at six levels of school organization.

Protocol #5

Adapting Systems to Allow Growth

Six Levels of School Organization

What options could your team explore to adapt the high school organization?

Levels of the System	Examples	Options for Adapting the Organization	
		Short Term	Longer Term
Community Vision Expectations for the high school	<ul style="list-style-type: none"> ■ School board ■ Parents ■ Business groups ■ Community agencies ■ Colleges ■ Government 		
Systems Structures and processes that govern the flow of human energy and resources	<ul style="list-style-type: none"> ■ Schedules ■ Faculty contracts ■ Guidance availability ■ Yearly budgeting ■ Department structure ■ Bus schedules 		
Curriculum Grade level course sequences, tracks and subject divisions, with testing	<ul style="list-style-type: none"> ■ Core courses ■ Distribution requirements ■ Graduation requirements ■ Carnegie units ■ Testing systems 		
Teaching Classroom and field-based instruction	<ul style="list-style-type: none"> ■ Course syllabi ■ Multiple "sections" ■ Faculty availability ■ Time for planning ■ Faculty development ■ Course design ■ Assessment 		
Advising and Mentoring Guidance from a caring adult	<ul style="list-style-type: none"> ■ Faculty awareness ■ Commitment ■ Mentor awareness ■ Contact time ■ Space 		
Learning Student readiness for self-direction	<ul style="list-style-type: none"> ■ Student passivity or fear ■ Student experience with active learning ■ Suspicion/rebellion ■ Experience with independence ■ Self-consciousness 		

Organizing personalized learning

As a team, you may already agree on ways to organize personalized learning in your school. Thinking about “organizing” kids, teachers, schedules, systems, and public expectation may serve to make sure that your team does not overlook a crucial element at this early point. Use the final application in this segment to help you answer the toughest questions: What strategies could you use to elicit support? Where is there acceptance or opposition to personalized learning in the school? How can you tap the larger system?

You will find some level of clarity as you talk through the Going Public worksheet for this section, but your work with the content and process of your personalized learning will surely lead you back to your organizational analysis, with new tasks and changed priorities.

The worksheet on the following page may help your team organize itself to approach different parts of the school seeking support. The sheet is arranged to focus on any element you have chosen to develop as part of a personalization project—Personal Learning Plans, portfolios, or presentations—or other ideas that have emerged in your dialogue, such as advisories or small school initiatives. With your vision and priorities in view,

- 1) Identify the specific parts of the school where support is needed;
- 2) Brainstorm areas of school life where acceptance and resistance can be predicted;
- 3) Identify the different options for strengthening support and reducing resistance.

Your strategy list may look disjointed at this point. As your team designs a framework for your program in Key Dimension #3: Content and Process, you will probably find yourselves changing the strategy list to accommodate new ideas. Again, when you focus on Key Dimension #4: Assessment, you may need to reconsider strategies for adapting existing practices. In the final segment, Key Dimension #5: Leadership, you will look at all the strategies you have considered and try to figure out the best way to introduce your project in the life of your school.

As you continue through the rest of the workshop, ask yourself:

How can I initiate the change process?

Going Public in Key Dimension #2 — Organizing a Project to Grow

Program Organization: How will you organize your personalized learning program in order to best support students and teachers in meeting the stated purpose(s) of the program?

Design option (needing people, time, and space)	Parts of school where support or adaptation is needed	Areas of acceptance/ Areas of opposition in school	Strategies for eliciting support	What will we do?
Personal Learning Plans (PLPs)				
Presentations/Senior Projects				
Portfolios				
Advisory				

Reflective Interlude: Chalk Talk

Time	Activity & Description	Materials
10 minutes	<p>Reflective Interlude: Chalk Talk</p> <p>The teams have been working in isolation for a good period. This “chalk talk” can be useful in helping them talk to one another about the challenges they have faced. Begin by taping a large sheet of butcher paper across a wall and writing, “Can high schools adapt to support personalized learning?” in the center.</p> <p>Everyone should have a magic marker. Anyone can write anything in response to the question or in response to other responses that appear on the wall. The whole group should gather around the butcher paper, standing. No one should speak, except through the butcher paper.</p> <p>When people have stopped writing, ask them whether they see a trend, theme, or new idea on the wall?</p>	<p>Large butcher paper</p> <p>Markers</p> <p>Blackboard & chalk</p>

Protocol #6

Chalk Talk

Having discussed with your team the purpose and structure of a personalized learning program, it's almost time to focus on designing a project. Still, some reflection at this point can help your team and others get issues out into the air that can interrupt program design if left unattended.

Synthesis

Use a blackboard or a large piece of butcher paper pasted to the wall to elicit a dialogue about setting purposes and defining structures for personalized learning. Write on it the following question:

Can high schools adapt to support personalized learning?

Stand in a semi-circle around the butcher paper, holding a colored marker. Think about what thoughts you have had about school structures and student exploration of their own purposes.

- Any person can write an idea or question on the paper.
- When others have read what is written, they, too, may attach their ideas, either connecting or contrasting.
- One after another, individuals should feel free to add their ideas to the growing dialogue, connecting their ideas to others with lines or arrows.
- After the flow of ideas has abated, stand back and try to “read” the whole display to make sense of what is there.

Reflection

When this activity is over, the whole group may discuss the comments and questions suggested about the process of designing personalized learning.

- What themes are dominant?
- What issues attract attention?
- What solutions need to be explored?

Key Dimension #3:

CONTENT AND PROCESS

Time	Activity & Description	Materials
15 minutes	<p>Key Dimension #3: The Content and Process of Personalized Learning</p> <p>The first five pages of this section include quotations from the literature and illustrative diagrams from a Vermont high school. All of them are meant to represent personalized learning as one process with three major purposes:</p> <ol style="list-style-type: none">1) Self awareness: what the student learns about his or her own values, ambitions, talents, knowledge, and special skills;2) Explorations: what the student learns about the world he or she is about to enter as an adult;3) Confirmation: what the student learns about defining pathways available to the future she or he has begun to imagine. <p>The three purposes can become a recurring cycle throughout the high school years, helping students understand themselves, choose options, and make corrections as they develop an increasingly clear picture of their adult lives.</p>	Workshop Guidebook
30 minutes (option)	<p>Protocol #7: Focusing and Defining: Three Options in Personalized Learning</p> <p>This protocol introduces the three major components of personalized learning, but only in terms of purpose:</p> <p>Awareness = Personal Learning Plans Exploration = Personal Portfolios Confirmation = Presentations & Assessment</p> <p>Teams should discuss the importance of each to the purpose they have set for their work in Part 1. What aspect of personalized learning do they want to emphasize? What component might receive less emphasis—or none at all? Each team should come up with a primary focus for its work and be able to explain its choice in terms of the purpose it has set. The exercises in this section aim to clarify choices and give team members a foundation for program design.</p>	Protocol #7

Key Dimension #3: Continued

Time	Activity & Description	Materials
10 minutes	<p>Self Awareness and Purpose Through Personal Learning Plans (PLPs)</p> <p>The three paragraphs that introduce this section can serve to introduce PLPs as an option, either as recommendations (NASSP) or as successful practice (Deborah Meier). It may be useful to mention that PLPs create pressure in high schools toward increased independent learning through internships, self-directed study, and special projects. Also, emphasize that the protocol that follows is an experiment, designed to give teams part of the experience of developing a PLP.</p>	Workshop Guidebook
20 minutes (option)	<p>Personal Learning Plans</p> <p>Protocol #8: Practicing Mapping: Dialogue and Search for Learning Options</p> <p>There are five mapping exercises included in this section. Rather than asking individuals to complete all the maps, suggest that they include one map or two, just to test the process. The process is designed to help students convert their current awareness (hopes, fears, etc.) into questions that they can explore through coursework, field work, or independent inquiry. For this experiment, ask individuals to find another person with whom they would like to work. Each individual should then complete any of the maps (10 minutes).</p> <p>When they have finished, “advising” can begin, with five minutes allotted to each partner: the advisee should explain his or her map to the partner advisor; the advisor should take brief notes on aspects of the map that raise questions or issues, working with the advisee to frame each issue as a question (or even a goal to be pursued); for each question that is generated, advisor and advisee can brainstorm learning options that could help the advisee find answers.</p> <p>Partners may note that some options grant formal credit and some can be answered through experience alone.</p> <p>Discussion: (Option) What changes might occur in your school if all students were to meet with an advisor each year to discover questions and brainstorm learning opportunities? (See exercise 6)</p>	Protocol #8
10 minutes	<p>Protocol #9: Personal Learning Plans: Sketching a PLP Sequence in the High School Years</p> <p>With a hypothetical structure in view, Protocol #9 asks teams to think about the structure of PLP development over four years. (continued)</p>	Protocol #9

Key Dimension #3: Continued

Time	Activity & Description	Materials
10 minutes	<p>Protocol #9, continued</p> <p>If teams are already committed to following a different four-year track or if they are committed to a single year, ask them to sketch the process they would use to guide students through the four stages listed in the left-hand column.</p> <p>As time runs out, ask teams to consider further changes in their organization that are needed to support the decisions they have made.</p>	Protocol #9
5 minutes	<p>Portfolios</p> <p>Any of the quotations that introduce the section on portfolios can be used to focus this section of the workshop. Reading the dialogue by Tyrone Jones may also communicate the flavor of a school based on portfolio development. It may be important to stress at this point that the portfolio being described in this section is a “best work” or presentation portfolio, a low stakes version that does not base graduation on successful completion. Making portfolios integral to the assessment system, in classes or as whole-school exercises, raises the stakes and increases the need for whole-school adoption and engagement. The focusing question should be:</p> <p><i>How would portfolio development affect personalized learning in your school?</i></p>	
30 minutes	<p>Protocol #10: Team Consensus: Issues in Portfolio Planning</p> <p>Absolute agreement on all the issues raised in Protocol #9 may not be possible. Instead, the exercise is designed to help teams confront the issues that emerge when students begin collecting evidence of their learning. Each of the questions implies a task for the team to consider. For example, if a common format is desirable, what is that format? Who will design the guide? Who will help students gather and assess work? Even before beginning this protocol, remind the team that its agreements will change the organization it began to envision in Part 2, or even the purpose it asserted in Part 1.</p> <p>Individuals within a team should complete the scales without consulting with their team; a team facilitator should collect the ratings from team members on a fresh copy, so the range of responses is visible; the facilitator should ask individuals above and below the apparent median to talk about their rating and explain (continued)</p>	Protocol #10

Key Dimension #3: Continued

Time	Activity & Description	Materials
30 minutes	<p>Protocol #10, continued</p> <p>the concerns; from a general discussion, the team should agree on a number that fairly reflects the consensus of the group.</p> <p>Explain that questions with very high or low ratings may deserve special attention as the group designs its plan. The determination of the group should be clear in its program presentation.</p>	Protocol #10
20 minutes	<p>Protocol #11: Portfolio Content: Seeking Portfolio Artifacts from Academic Courses</p> <p>The purpose of this exercise is to help teams review the existing curriculum for assignments, tasks, and projects that already challenge students to meet standards. Existing products may make up a good part of student portfolios. Beyond the list of courses and products, the real test of existing assignments for student work should be the standards the group has selected for assessing the portfolio. Teams may have no clear idea of the standards they might use at this point, but noting standards next to each task will allow them to notice gaps. When groups have completed the exercise, ask them to discuss the gaps they see.</p> <p>How would the team adjust school practice in order to include a larger number of important standards? You can use the sampler from the Mount Abraham Electronic Portfolio to demonstrate how existing courses can generate portfolio artifacts that meet both content and process standards.</p>	Protocol #11 Mount Abraham Electronic Portfolio
20 minutes	<p>Presentations and Exhibitions</p> <p>The quotations that lead this section may help to introduce the question of presentation: How would student presentations affect the success of personalized learning at your high school? Explain that presentations change the character of the high school, including the climate and energy. Presentations periodically put student learning directly at the center of life in a school. Unlike exams or papers, they are public events for which each student has personal responsibility. If the content of presentation includes class assignments, teachers must begin to focus their teaching more on projects than information recall. In short, they push a faculty toward authentic assessment, tasks from adult experience that pose complex questions and (continued)</p>	Workshop Guidebook

Key Dimension #3: Continued

Time	Activity & Description	Materials
20 minutes	<p>Presentations and Exhibitions, continued require multiple sources of information.</p> <p>Often, the task of completing a portfolio, with reflections and introductory essays, helps meet communication standards. Presenting whole portfolios at regular intervals can underscore the progress a student has made within a range of standards.</p>	Workshop Guidebook
20 minutes	<p>Protocol #12: Preparing for Student Presentations As you introduce the protocol on presentations, explain that the teams will face a choice as they proceed. Should presentations feature the inquiry students have pursued for their Personal Learning Plans? Should they emphasize the knowledge students have gained from their existing courses? Do they want to focus attention on independent learning from independent studies, internships, or special projects?</p> <p>This protocol is a discussion guide, asking teams to list the kinds of projects students might complete in order to prepare for a quarterly, semester, or yearly presentation. At this point, urge the teams not to make decisions, but simply to list all the possible presentation options that are already available, or that could be a new part of a personalized learning program. Their lists of options will only be a sampler, but they may reveal the flavor of what is possible through a more complete survey of tasks and projects within the whole faculty.</p>	Protocol #12
30 minutes	<p>Going Public #3: A Graphic Representation of Parts Creating a Whole Process</p> <p>As the section on the content and process ends, each team needs time to represent the program it has begun to imagine as one process with several facets or phases. A flow diagram might work well. (See Figures 1 and 2 at the beginning of the section.) Cluster diagrams or concept maps can also work well. You can let the teams discover the structure that works best for them, and cruising the room may reveal whether any team is stuck.</p> <p>When teams have developed a representation of their program framework, ask each to present the diagram to other teams and explain it within 5 minutes. If time permits, ask the audience to provide warm or cool feedback.</p>	Going Public #3 Worksheet

In short, personalized learning allows the student to understand who he or she is, what adult roles seem most desirable, and how to get from here to there in the most productive way.



Key Dimension #3

The Content and Process of Personalized Learning

What is personalized learning about? Like history or algebra, personalized learning has to have content in order to have value. The content of personalized learning has three components:

1. **Self awareness:** What the student learns about his or her own values, ambitions, talents, knowledge, and special skills;
2. **Explorations:** What the student learns from classes and field experiences about the world he or she is about to enter as an adult;
3. **Confirmation:** What the student learns about defining pathways available to the future she or he has begun to imagine.

In short, personalized learning allows the student to understand who he or she is, what adult roles seem most desirable, and how to get from here to there in the most productive way.

Conventional high schools have been designed to protect young people from the adult world, rather than to expose them to adult challenges. Consequently, young people are deprived of a chance to see how their talents and knowledge can make a difference in the lives they lead.

“*The degree to which youth feel valued by the larger community, the opportunities they have to play useful roles, and especially, the amount of service they typically contribute, all drop steadily across the middle school and high school years. The majority of youth in our surveys are less empowered and less connected as they grow older and move closer to the assumption of adult responsibilities.*” (Scales & Leffert, 1999)

Reversing this tendency is the collective purpose of PLPs, Portfolios of Student Work, and Exhibitions of productive learning.

At the Met, students establish a unique intern relationship called Learning Through Internship (LTI) with a mentor in the community.

“*Unlike traditional internships which train students for specific jobs, the purpose of the LTI is to help students achieve the Met Learning Goals—the general skills and knowledge needed for all work, citizenship and college. Working alongside adult experts in the field doing real projects on the job, students hone their reading, writing, math and other skills, while adopting a work ethic.*” (The Metropolitan Regional Career and Technical Center, 1997)

Most personalized learning is designed to carry students from one phase to another, from expanding self-awareness, to understanding the demands and opportunities beyond high school, to setting a path and defining reliable steps. The process leads from the inner world, where dreams are hatched, to the adult world, with its very real demands, customs, and constraints, and finally, to a pathway that the student can see and understand clearly—leading to success in adult roles. Though often treated separately, PLPs, portfolios, and presentations all have the purpose of connecting student talents and aspirations to the adult world that awaits them.

“*What is it that makes certain experiences empowering for youth? Empowering programs include components in which youth reflect about the meaning of their activities. Do and not just observe; work with accepting and un-criticizing adults; have adult responsibilities; have a sense that they can make a contribution; and have the freedom to explore their own interests and develop their own ideas.*” (Hill, 1983)

Schools that personalize learning tend to favor heterogeneous grouping, creating flexible processes that can serve all students. Robert Mackin at Souhegan High School believes that a common challenge creates a supportive school climate:

“*If all students are expected to learn and to meet high standards, then does tracking or homogeneous grouping make sense? Not remarkably, a belief that students can learn and that they can be trusted and respected led to*

self-fulfilling behavior. Students behaved in responsible and respectful ways because they were expected to do so; and quickly came to perceive themselves as a “Community of Learners” born of respect, trust, and courage.” (Mackin, 2003)

On their own, high school students cannot ask the right questions, set a path, and gather useful information. They need a structure with processes that help them understand the meaning of their learning and use it to set new directions. In short, they need the support of a caring adult.

“*Research shows that one of the most important factors behind student success in high school, especially that of disadvantaged students, is a close connection with at least one adult who demonstrates caring and concern for the student’s advancement. Accommodating the cultural and intellectual diversity students bring to high school also requires that teachers and administrators know students well so they can address the unique learning needs of each student.” (Letgers, et al., 2002)*

School must be organized to encourage adults to form supportive relations with students.

“*The atmosphere must allow the adults the time and support to focus on students as people who have promising hopes and aspirations, even if those are veiled or hard to draw out. The adults need to believe deeply that in those hopes lies all motivation for learning, and that by attending to aspirations, teaching becomes ever more powerful. In addition, the adults need a personal toolkit of their own that helps them develop the sensitivities, responsiveness, and vocabulary of personal learning.” (Friedrichs & Gibson, 2003)*

Self-awareness, exploration of the larger world, and setting pathways are actually part of one process: personalized learning. We have chosen to take on each of these

three components separately, however, in order to give teams a good chance to look at options in each phase of discovery. We have also chosen to focus tightly on three specific approaches to each phase:

1. **Personal Learning Plans (PLPs)**—students look at themselves and generate questions about their futures that can become goals for personal learning;
2. **Portfolios**—students show evidence gathered of the skills and knowledge they are developing from the explorations of their goals;
3. **Presentations**—students present what they have learned to an audience of adults and peers, and receive confirmation (and correction) for the directions they have chosen.

In any of these phases, student interest can be intense—a sure indication that the process is working. At other points, students may discover frustration: they may lose commitment to an early hope; they may lack the drive to develop the skills they need; they may come to see that their aspirations will not be met in the future they had begun to imagine for themselves. By supporting personalized learning over an extended period of time, a high school can allow student questioning, exploration, and reflection to follow its awkward path toward resolution. Even with frustration, students get better at self-directed learning as they work through cycles of inquiry and grow more confident in themselves.

Some high schools have chosen to develop only one of these strategies. Other schools merge two or more into a single process. Figures 1 and 2 on the following pages show how The Futures Academy at Mount Abraham Union High School in Bristol, Vermont, designed a personalized learning program to fit together over the four years of high school.

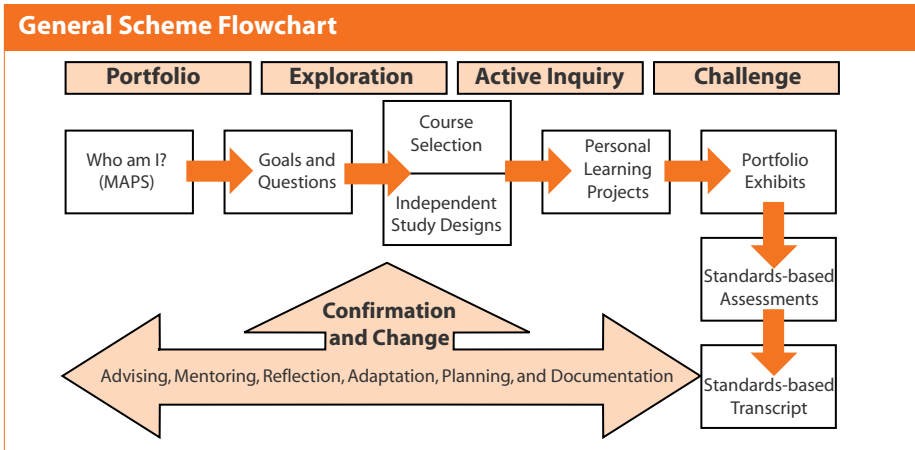


Figure 1: General Scheme for Student Planning, Learning, and Portfolio Assessment

Reprinted by permission of The Futures Academy at Mount Abraham Union High School, Bristol, VT.

Figure 2 (see next page) represents the same concept applied to all four high school years. An asterisk is attached to each element that Mount Abraham had to add to make personalized learning coherent and continuous over four years. This representation aims to include a wide range of different personalized learning options, beginning at the middle level and extending past graduation.

This workshop will ask you to take on three phases of personalized learning as if they were separate. In fact, you may merge all of them within a single program. Your team may choose to roll PLPs into the advising process or into portfolio development. Rather than portfolios that include course assignments, your portfolios may include only special projects such as service learning reports, work-based learning reflections, or senior projects. Many combinations are possible.

Your team may want to design its own series, fitting your purpose. The only caution is to avoid dropping an assignment on students for which they have inadequate support or preparation. Inequitable assignments often occur in schools where tracking prepares some students for presentations—but not all. Protocol #7 asks you to look carefully at your purpose, consider the organization you have begun to imagine, and then represent the priority your team should put on PLPs, portfolios, and presentations.

Four-Year Sequence Flowchart

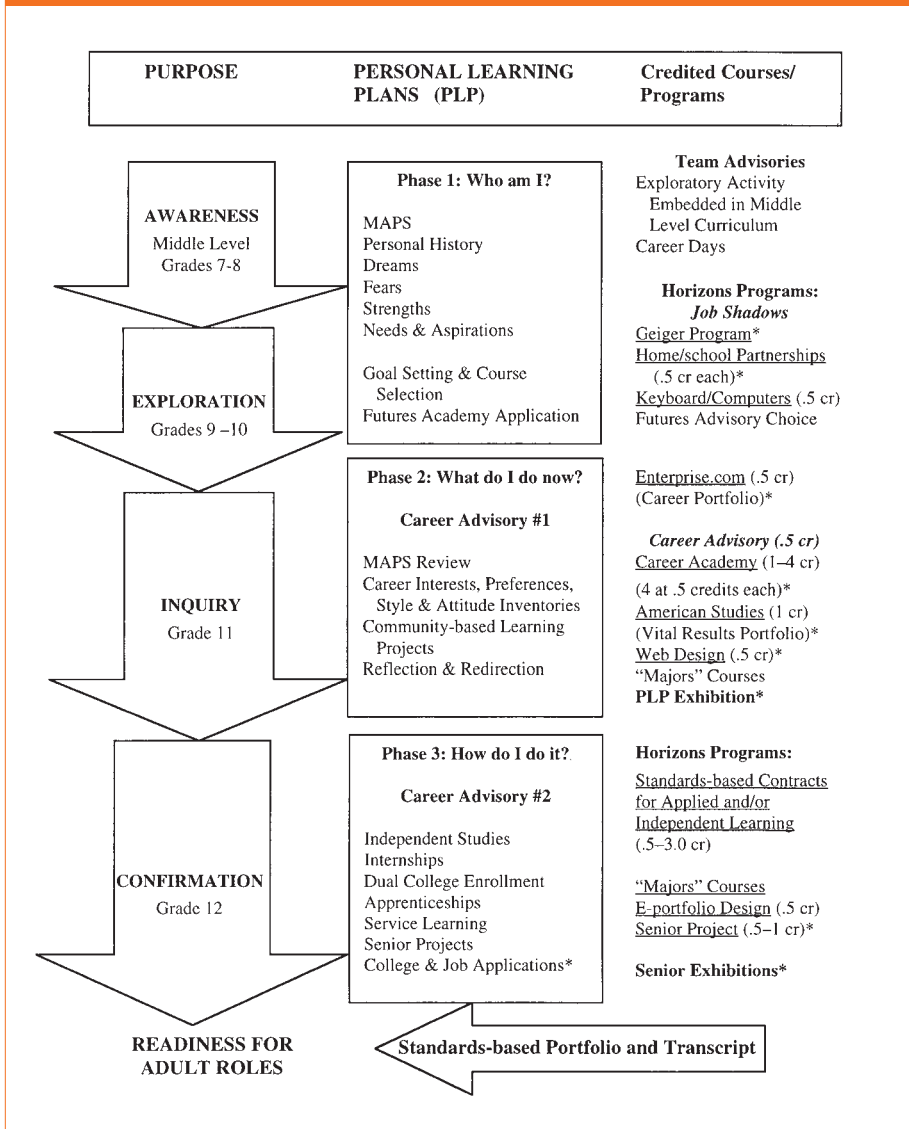


Figure 2: Courses and Advisories in a Proposed Four-Year Sequence at Mt. Abraham Union High School, Bristol, VT.

Adapted from McGuire, E., Barnhart, K., Whiple, S. (2000). *Personal Learning Plans (PLP) Guidebook*. Mount Abraham Union High School, Bristol, VT.

Protocol #7

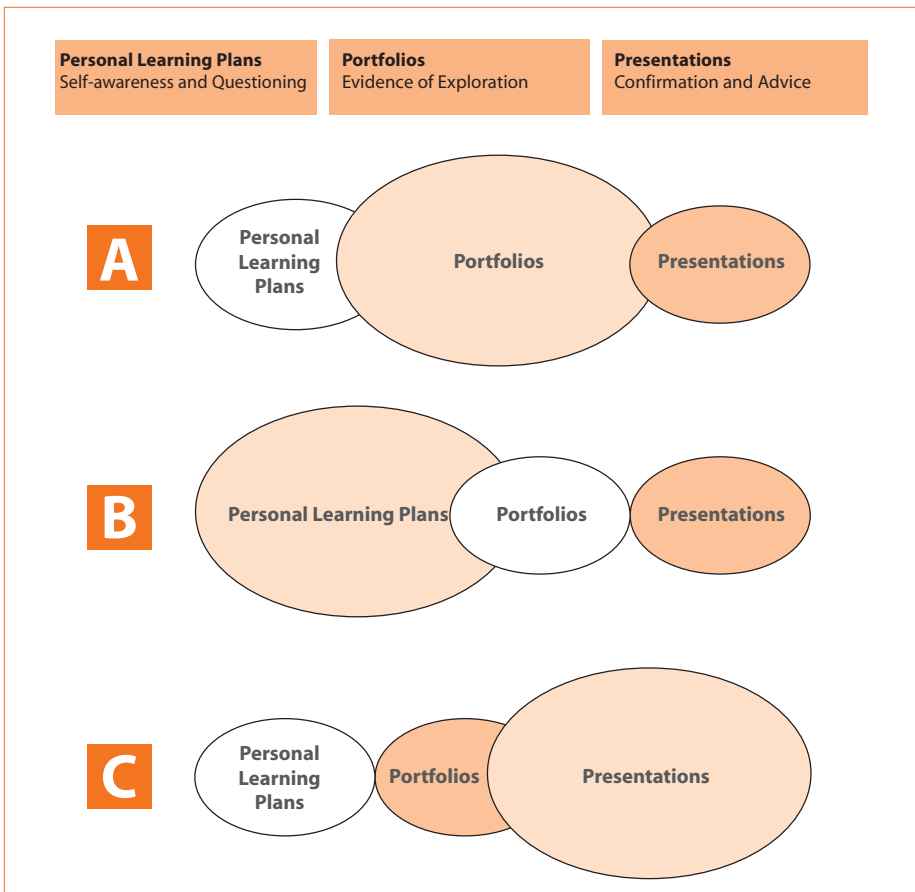
Focusing and Defining: Three Options in Personalized Learning

What relative proportions should your project achieve?

Option A: Major Portfolios

Option B: Major Personal Learning Plans

Option C: Major Presentations



Using the worksheet on the next page, or a separate sheet of paper, have your team create a graphic that represents the purpose you have set.

Protocol #7 Worksheet

Three Options in Personalized Learning

Following the examples on the previous page, create a graphic that represents the purpose your team has set.

Personal Learning Plans
Self-awareness and Questioning

Portfolios
Evidence of Exploration

Presentations
Confirmation and Advice

PROTOCOLS FOR CONTENT AND PROCESS

The team exercises that follow treat Personal Learning Plans, portfolios, and presentations as the cornerstones of personalized learning. All three provide a medium in which student interest and motivation take center stage in a high school. High schools have succeeded in personalizing learning with different elements of these three techniques. While the techniques may be useful, the purposes that guide them are more important:

- **Self-awareness**—Students need to clarify their own interests, talents, and aspirations in the rich context provided by education;
- **Exploration**—Students need to test their understanding and purposes in school but also in adult contexts where knowledge does make a difference;
- **Confirmation**—Students need a periodic look at the work they have done and the progress they have made toward their own aims, as well as toward established standards.

The exercises and illustrations in this segment are organized into three sections: 1) Personal Learning Plans (pp. 55-67), 2) portfolios (pp. 68-84), and 3) presentations (pp. 85-88), and are more a sampler than a prescription. As a team, you can use them to test your own vision for how personalized learning can be introduced or expanded in your school.

1. PERSONAL LEARNING PLANS

The recommendations for Personal Learning Plans in *Breaking Ranks*[™] are explicit and straightforward:

- Each student will have a Personal Plan for Progress to ensure that the high school takes individual needs into consideration and to allow students, within reasonable parameters, to design their own methods for learning in an effort to meet high standards;
- The school will review each student's Personal Progress Plan continually and indicate the extent of progress toward graduation and post secondary transition plans. (NASSP, *Breaking Ranks*[™], 1996)

Clearly, *Breaking Ranks*[™] saw the PLP as the organizing process for learning that fits

the needs of each student and lasts four years. *Breaking Ranks*[™] also proposed the PLP as a process that could validate learning acquired in interaction with the community at large, sustaining and guiding growth from youth to adulthood.

“*The progress plan will be the vehicle by which a student can arrange for credit-bearing learning experiences beyond those that are part of the usual curriculum... by the time a student reaches the halfway point in high school, the Personal Plan for Progress should start emphasizing a transition plan to direct the student’s curricular goals toward whatever it is that the young person wants to do after earning a diploma. Even a dropout will have a progress plan so that the youngster leaves with a blueprint for making as good use as possible of the immediate future and perhaps for returning to formal education.*” (NASSP, *Breaking Ranks*[™], 1996)

Deborah Meier at Central Park East High School in Manhattan was one of the first to use PLPs in a collaborative dialogue among students, teachers, advisors, and parents.

“*Creating this plan—a joint activity of student, family and advisor, enables us to put together a package of courses (both on and off-campus), internships or apprenticeships, independent study, and other external experiences that will lead a student from the protective cocoon of [high school] to his or her next and most important task as a graduate.*” (Meier, 1995)

When Vermont developed its statewide plan for high school personalization, preparing the student to take leadership over learning was a central idea.

“*Personal Learning Plans recognize the individuality of student learning styles, histories, interests and aspirations, and allow the student, in concert with school staff and family, to guide the learning experience. Because of the central role each student plays in constructing a PLP, the student’s own ambitions, talents, and interests become the unifying elements of his or her learning process over four years.*” (Vermont Department of Education, *High Schools on the Move*, 2002)

Beginning with self-awareness: From “Who am I?” to Making Action Plans (MAPS)

How can we make students more aware of their talents, interests, and aspirations so they can begin to plan effectively? Many strategies exist, including interest inventories, learning style profiles, career exploration software, and experiential challenges such as Outward Bound. This section focuses on MAPS (Making Action Plans)—and using five reflective prompts to create dialogue between a student and advisor about what matters most to the student. The questions in each prompt generate a MAP of student interests and focus curiosity.

Prompts for Organizing a Mapping Brainstorm

Who are you? Describe yourself in as many ways as possible. What words describe you? What do you like? Dislike? What are your favorite activities? What are your strengths? Gifts? Talents?

History: What important things have happened in your life? Highlight people, places, events, successes, challenges, and achievements.

Dreams: What hopes do you have for the future? What vision of the future pleases you? What are your dreams concerning school, work, life experiences, friendship, and fun?

Fears: What do you *not* want to happen in your life? What barriers or challenges do you face in making your dreams possible?

Needs: Looking at your history, personal qualities, dreams, and fears, what do you need to make your dreams come true? What will make your high school experience move you toward your hopes?

Students and advisors (parents and teachers) create a dialogue about parts of the student MAP to raise questions and look for ways to answer those questions through course-work or community-based learning. In some high schools, students and advisors create MAPS on newsprint that the student can hang on a wall at home and change as inspiration and discovery might dictate. For 9th and 10th grade students, a MAP may be confused by discordant dreams, conflicted by relationships with parents and friends, or simply short and stifled by the shocking novelty of self-revelation. Early MAPS can change radically as students test their dreams against realities. As a student begins to pursue the questions and goals that result from a

MAP, he or she also begins to gather materials that represent movement toward clarity and competence. Advisors should help students see the changes that arise along the path and also collect the artifacts that have marked their exploration—papers, tests, projects, performances, creations, and photos—for inclusion in a student portfolio.

As students describe their self-perceptions, they also raise questions. *Should I continue exploring nature? Am I a real writer? Are my dreams possible? Which ones have the most power? Will my fears slow me down? Can I meet my own needs while pursuing my hopes?* Working with an advisor, students begin to see the whole array of goals that are possible from where they are right now. Capturing those goals and questions on paper as they emerge gives students and advisors a place to start planning a personalized high school experience.

In Protocol #8, you will be working with an “advisor” among those present today to practice using the five mapping steps to see what questions, options, and goals arise when discussion begins about personal identity, history, dreams, fears, and needs or questions. The protocol includes five reflective exercises that students and teachers can use to begin a conversation about student purpose:

- Exercise #1 focuses on student self-perception, “Me,” and may reveal clues about existing interests, hobbies, or points of pride.
- Exercise #2 on “Dreams” may reveal the hopes that a student projects into the future.
- Exercise #3 focuses on “Fears,” allowing a dialogue to include discussion of constraints that make attaining hopes more difficult.
- Exercise #4 focuses on “History,” highlighting important people and milestones that have shaped who the student is today.
- Exercise #5 focuses on “Needs” and another view of constraints to be overcome.

Finally, in Exercise 6, with MAP and goals in view, a teacher and student can begin to brainstorm the options that exist for the questions and goals that have emerged during the discussion. At that point, the MAP has become a planning guide.

To see how a MAP might begin a PLP planning session, complete any part of the MAPS in the first five exercises on your own. Then, in Exercise 6, talk with a team member to see whether your brainstorm generates questions or goals that are worth pursuing.

Protocol #8

Practicing Mapping: Dialogue and Search for Learning Options

In dialogue with another educator, you can use any of the MAPS exercises that follow (Forest & Pierpoint, 1992; O'Brien, Forest, et al., 1989) to explore options that may exist in your community.

Part 1: Experiment with MAPS

- 1) Select a partner who might serve as advisor for this exercise;
- 2) Select one of the following MAPS exercises (but not necessarily the same one) to begin the exploration;
- 3) Take 10 minutes to respond to the question, placing notes on the guide as your thoughts emerge.

Part 2: Dialogue on Options

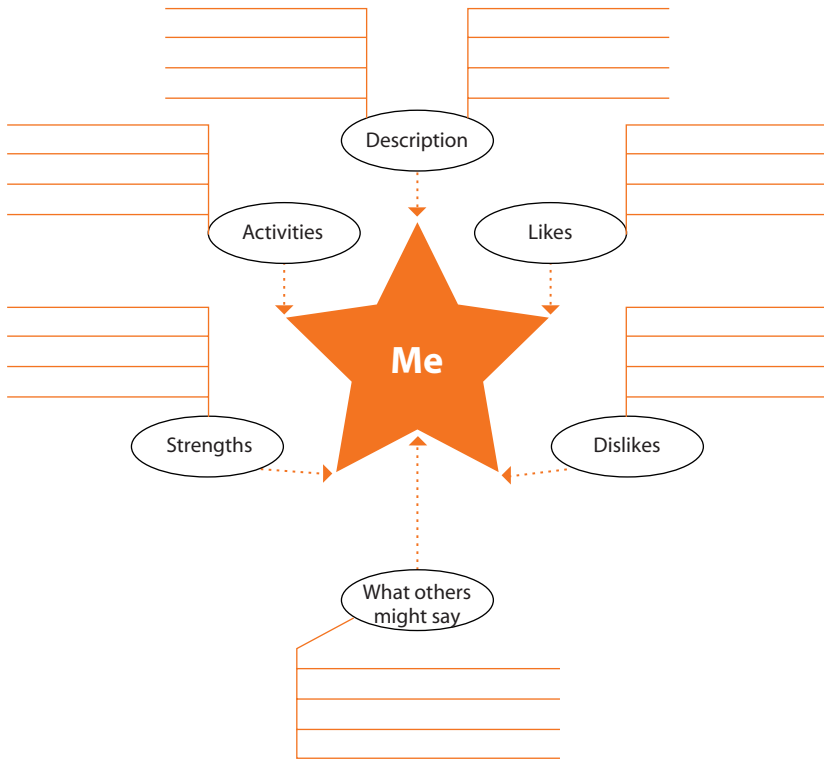
Taking turns acting as student or advisor, begin a dialogue that converts your notes to questions that may be answered through different kinds of educational experiences. The advisor can take notes on the form that follows:

Questions that emerge through dialogue (Listen carefully to identify active issues)	Options for learning that may be explored (Search for related learning options)

(Exercise #6 of MAPS asks you to make decisions about options to explore.)

MAPPING Awareness—Making Action Plans

Who are you? Describe yourself in as many ways as possible. What words describe you? What do you like? Dislike? What are your favorite activities? What are your strengths? Talents? What would others say about who you are?

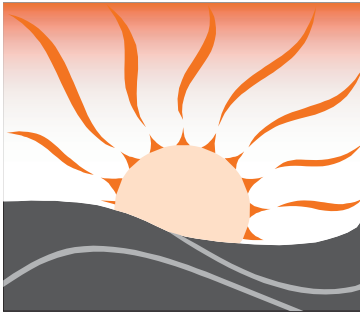


With your advisor, can you select the attributes that make you most distinctive?

Protocol #8: EXERCISE 2

Gaining Clarity From Hopes and Dreams

Dreams: What hopes do you have for the future? What vision of the future pleases you? What are your dreams concerning school, work, life experiences, friendship, and fun?

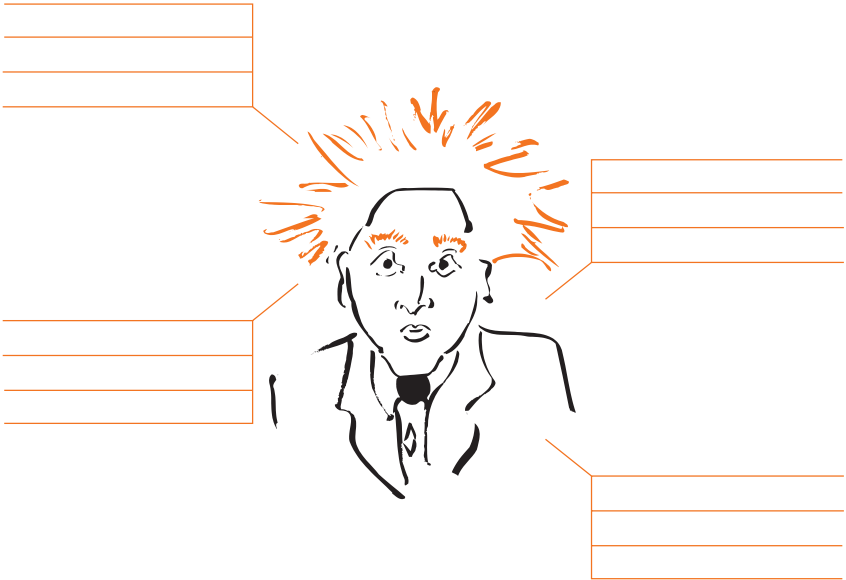


How do you make your hopes come true?

Protocol #8: EXERCISE 3

Fears and Constraints

Fears: What do you not want to happen in your life? What barriers or challenges do you face in making your dreams possible?



What could prevent you from realizing your hopes?

Protocol #8: EXERCISE 4

History—Taking Direction From the Past

History: What important things have happened in your life? Highlight people, places, events, successes, challenges, and achievements.

Long ago

A while ago

Recently

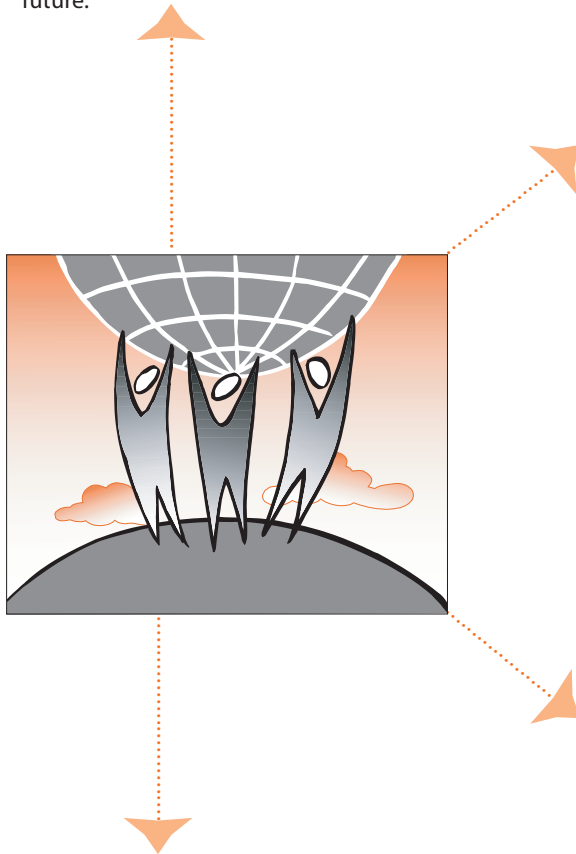


What parts of your history made a big difference in the way you are today?

Protocol #8: EXERCISE 5

Needs—What Should We Explore?

Needs: Working with your advisor and your personal MAPS—self-description, history, hopes, and fears—list the themes, ideas, or future possibilities that you may need to explore further as you plan your way toward your future.



Can you see any connection among these options?

Protocol #8: EXERCISE 6

Questions and Goals

Looking at your needs and other MAPS, talk with your advisor about the kind of experience you want to have—and questions you want to answer.

What experiences do you want to have?

What questions do you want to answer?

What passions might you want to develop?

Questions to consider as a team

How would the process of increasing student awareness, raising questions or goals, exploring options, and confirming progress fit in your high school? Figure 2 (p. 52) shows how the process helped organize program development at Mount Abraham High School from 7th to 12th grade.

Protocol #8 asked your team to think about how the five phases of a MAPS process might fit in your plan for personalization. Try to imagine that each student in your school was using an advising process to clarify personal aspirations and set goals that can be met through different kinds of educational experiences, including courses at the school. As the students work their way toward graduation, their Personal Learning Plan would change to reflect their growth and changing interests. Ninth graders might be well served by an Advisory, course selection support, and some guidelines for service learning. Beyond ninth grade, options would probably expand dramatically:

Tech programs	College courses (dual enrollment)
Academies	Project-based learning
Service learning programs	Apprenticeships
Summer programs	Jobs and skill development
Arts programs	Child-care services
Internships	Volunteer programs
Overseas travel	Sports and clubs
Work-based learning	Community theater

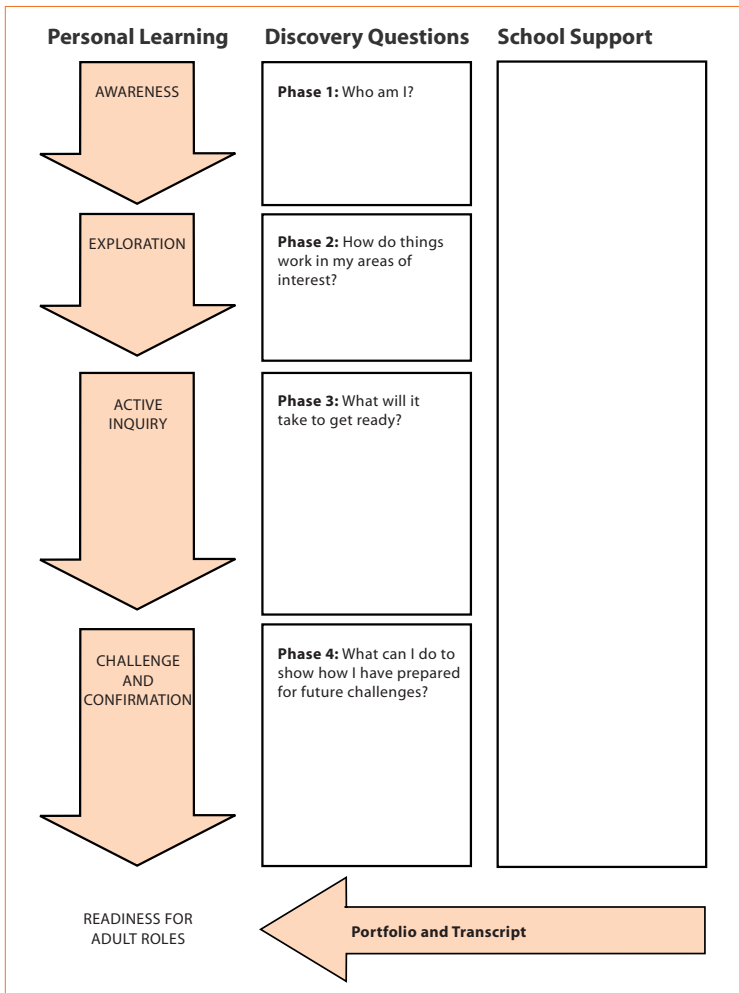
Each of these experiences can have a powerful effect on student learning both by becoming a reference point for academic course work and by generating artifacts of student work that represent achievement of school standards.

If your students used Personal Learning Plans to find their way toward graduation and beyond, what support could the school provide so students could carry out their plans? Protocol #9 asks your team to use the PLP sequence of questions to consider the various supports students may need as they progress through your program. As a team, list the required supports your team might have to develop within the school to make Personal Learning Plans work.

Protocol #9

Personal Learning Plans: Sketching a PLP Sequence in the High School Years

Sketching a pattern of PLP supports: What kinds of activities could be organized at your school to help students progress from dependence to independence in learning as they move toward graduation?



2. PORTFOLIOS

Portfolios have been used for a wide variety of purposes over the last two decades. In the context of personalized learning, a portfolio is a place where students collect evidence that they have explored their interests or met school expectations. Portfolios have been used so widely and for so many purposes that a school team may have to work through a number of questions to arrive at a point where its members are actually talking about the same thing:

- Is the portfolio required?
- Should a portfolio follow a set format?
- Is it standards-based?
- Should the portfolio include evidence from beyond classroom activities?
- Who selects the entries?
- Who guides revisions?
- Who holds on to the portfolio?
- Who assesses the portfolio?
- What criteria are applied?
- What happens when a student portfolio fails to meet expectations?
- Do portfolio results affect transcript reports?

Successful programs have had different responses to these questions, but the central question is this: Whose portfolio is it? Some schools treat portfolios as the property of the student, with the advisor helping each student prepare it for job and college applications. Other schools see the portfolio as part of the formal assessment system, requiring security measures and uniform assessment practices. Other schools let the portfolio illustrate “best” work but report only grades. But the importance of portfolios in student development and progress toward adult roles is clear. Portfolios focus attention on the quality of student work, featuring the unique talents, perspectives, and knowledge that the student can bring to bear on adult responsibilities.

What the literature says about portfolios

At the beginning of a portfolio process, student work may seem to have little intrinsic worth to teachers, parents, or the students themselves. However, when student work from a wide variety of endeavors has been collected, discussed,

assessed, and revised, the cumulative effect of portfolios is powerful indeed. As one graduate of Souhegan High School explained:

“*The [Souhegan] Mission Statement has never really meant anything to me. I once thought of the passage of words as nothing more than someone’s opinion. I wish I could have seen the message earlier, but I guess it takes something meaningful to happen before you read between the lines. My Senior Project made me see what was in between those lines and here is what I saw:*

*I have received the gift of challenge and my passion kept me strong.
My mind has grown in wisdom, and expanded far beyond.
My heart no longer weeps for the chance to understand,
Because the key to my success was placed within my hand.”*

(A Souhegan High School Senior)

The purpose of portfolios is to make student passions visible. The portfolios are not only evaluation instruments, but also learning experiences that engage students in what Newmann et al. (1992) called “authentic achievement.” The tasks require students to organize information, engage in disciplined inquiry and analysis, communicate orally and in writing, solve problems, and make a cogent presentation before an audience. Students frequently remarked on how the portfolio experience deepened their understanding.

Linda Darling-Hammond has collected similar comments from students that reflect the value of portfolio development:

“*You get to do most of the thinking when you work with your portfolio. You have to explain in detail how to do something or why something is important, so that someone who doesn’t know it can understand it.”*

“*You take the role of the teacher.”*

“*The portfolio makes you develop your writing. It makes more sense for us to have to do an oral presentation, to answer oral questions about our work to see how we learned English.*” (from a new English language learner)

“*When you take a test, you don't feel like you need to know it after it is done. The portfolio sticks in your brain better. You have to manage your time before, after, and during school to do the portfolio.*”

“*All of the schools require students to complete a set of seven or more portfolios for graduation. These involve research papers, including a social science investigation and a scientific experiment, a literary critique, an arts product or analysis, a mathematical model or project, and an analysis of one of the student's internship experiences. Often, students complete autobiographies and graduation plans that look ahead to their futures. Traditional tests are also sometimes included in the portfolios.*” (Darling-Hammond, et al., 2002)

Just before Tyrone Jones graduated from University Heights High School in the Bronx a few years ago, he wrote a short dialogue for the school *Guidebook* to help new students understand how their portfolios could be used (pp. 71-72). The dialogue also reveals the kind of thinking students develop as they struggle to gather quality work.

What is a portfolio?

By Tyrone Jones, University Heights High School, The Bronx

Characters: Visitor—Miss Crabapple (Ms. C)

UHHS student—Jim

Setting: A classroom during project time

Ms. C: Good morning! I came here from a Nashville, Tennessee school to visit you today.

Jim: Welcome to our school. How can I be of help to you?

Ms. C: I have come to this school because I heard you are changing from credits to portfolio-based graduation. I would like to know more about portfolios. First, what is a portfolio?

Jim: A portfolio is a collection of a student's work.

Ms. C: So you put all your work in a folder and that is your portfolio?

Jim: There are several types of portfolios. There is a seminar portfolio that includes all of your work, even rough drafts, work in progress, and notes. You then choose the work that you believe is your best work to demonstrate that you have completed the requirements for our school.

Ms. C: What if teachers don't agree that this work is good enough?

Jim: Then the student would have to keep working on the project until it is good enough.

Ms. C: Is there a theme or a subject area that organizes these portfolios?

Jim: Instead of areas, we have DOMAINS. There are seven of them. You could say a Domain is a title that helps us to organize our learning. Each Domain includes several subject areas together. There are OUTCOMES under each Domain that are like sub-headings and explain the Domains in greater detail.

Ms. C: I see. But how do you fulfill these OUTCOMES and DOMAINS?

Jim: We do projects, and each piece of work is saved. Then we use this material to create a portfolio of good work under each Domain.

Ms. C: I still don't understand! Can you give me an example?

What is a portfolio? continued

- Jim: OK. Last semester I had to fulfill the Outcome: "Students show that they see different sides of issues." My project was to write both a Pro and Con argument on the question, "Should landlords be held responsible for the crimes of their tenants?" We studied the laws, read articles about different incidents involving landlords and tenants, and discussed them in groups. I then had to write out my own answer, which included both sides and my own opinion. I then had to write a cover letter in which I described what I did, how I fulfilled the Outcome, and what I learned from the project. I had to use English, history, and government in order to complete this project.
- Ms. C: How did you know what to do?
- Jim: There were specific criteria that told me everything I needed to do.
- Ms. C: Under which Domain does this Outcome fall?
- Jim: Critical Thinking and Problem-solving.
- Ms. C: How did you do on this project and how did you know?
- Jim: As I was working, the teachers were constantly writing descriptions of what I was doing and keeping them with my work. When the project was returned to me, it needed to be revised. After the revisions, I received a final assessment stating that I had fulfilled the Outcome because I had completed all of the necessary criteria. It narrated what I had done, where I was strong, and where I could improve.
- Ms. C: This makes the idea a little clearer. How do you think this method is of benefit to you?
- Jim: It helps me learn better because I'm looking more closely at my work. I'm learning to assess and understand my own work a whole lot better.
- Ms. C: I want to thank you for explaining all this. I can see the UHHS students are very superior to the average student.
- Jim: I'm glad I could be of help. I hope you understand portfolios more, and maybe I can visit your school sometime?

"What is a Portfolio?" from Clarke, *Interdisciplinary High School Teaching: Strategies for Integrated Learning*.

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Creating structures and processes to guide portfolio development can be both grueling and very enjoyable. Before designing a portfolio, however, it is wise to come to agreement on basic questions that pop up inevitably as the process begins:

- If the portfolio is a “high stakes” graduation requirement, security becomes an issue and storage becomes an obstacle;
- If the portfolio is electronic, space requirements drop, but technologists may be required to help students set up disks or Web pages;
- If portfolios are designed to collect classroom work, teachers must adapt their assignments so they generate artifacts worth collecting.

Particularly, students who have experienced little success in school may need an advisor or teacher to point out the importance of what they actually do in school. Developing a “portfolio culture” in a high school may take years of effort by students and faculty. When that culture does emerge, however, a high school comes alive with voices, as students develop evidence that they are pursuing their own goals while also meeting the expectations of trusted adults in their school.

Protocol #10 asks team members to work through answers to questions about portfolios individually, then to try and reconcile different answers and formulate a team perspective. Settling on a team perspective is useful at this point, but the process may have to be repeated with the larger faculty.

Protocol #10

Team Consensus: Issues in Portfolio Planning

What kind of portfolio might you propose to your school, if any?

1. Each team member should take 3-5 minutes to place a mark on the following scales to indicate the extent of your agreement with each statement.
2. When the team is ready, transport the marks (using initials or names if you wish) to a single page;
3. As a group, look first for areas of clear agreement, items in which the marks or initials are close together;
4. With items where there is less agreement, discuss the issues involved until the group can adopt a collective stance.

Should be required for graduation

Strongly Disagree | Strongly Agree



Should require a set format

Strongly Disagree | Strongly Agree



Should list required components or items

Strongly Disagree | Strongly Agree



Should be organized around common standards

Strongly Disagree | Strongly Agree



Should contain only class-based evidence of performance

Strongly Disagree | Strongly Agree



Development and revision is the responsibility of one teacher

Strongly Disagree | Strongly Agree

One teacher should be responsible for assessment

Strongly Disagree | Strongly Agree

The school should store and protect student work

Strongly Disagree | Strongly Agree

Students must revise until they meet expectations

Strongly Disagree | Strongly Agree

Students should receive a grade that affects transcripts and GPA

Strongly Disagree | Strongly Agree

What's in a portfolio?

What is in a portfolio? When students have control, portfolios can fill quickly with memorabilia, but fail to meet any clear educational purpose. On the other hand, when a list of elements is required and a format imposed, portfolios can become lifeless and dull. When the whole faculty is not committed to portfolio development, some portfolio sections begin to appear spotty and unsatisfying, while others flower.

The struggle to reconcile the school's desire for evidence of proficiency with the student's desire to express a personal perspective is well illustrated by one of the students attending a personalized high school in Maine who was interviewed and "shadowed" as part of the LAB personalization study (Clarke, 2003):

“*At first, people thought reflecting on the Maine Learning Results was useless and silly. For example, my essay on “healthy lifestyles” seems awkward and constrained. I saw then that the portfolio wasn’t going to be like I wanted it to be. Writing on the “Learning Results” is not so meaningful, because some council in Maine thought it would be.*”

In the senior year, kids were given the task of writing about themselves from a metaphor.

“*Writing about a metaphor gave me more latitude, more room... Choice makes the difference,” the student concludes. “In the metaphor assignment, people are choosing something of interest, something they really want to explore.*”

Clearly, designing a portfolio process with students involved in the deliberation could help balance the tendencies toward school accountability and student engagement.

By far, the greatest challenge to a school team considering portfolios is the task of persuading teachers across the curriculum to include potential portfolio elements in their class assignments. Quizzes and homework assignments look paltry and disconnected in any portfolio, even if the grades are high. College admissions

officers and employers will not want to look at them. Nevertheless, “What’s in a portfolio?” is a question that can generate a great deal of useful dialogue over a long period of time. That a portfolio system grows as a program develops is a sign of vigor rather than decline (Brandjes, 2003).

The question of portfolios is much more than a mechanical one. Portfolio development forces teachers to structure their courses around student challenges, projects, and expressive acts—a move many teachers find unfamiliar. In any high school faculty, powerful examples of assignments and student work that fit a portfolio framework already exist. When you look at them as a group, you may be impressed.

Protocol #11 asks your team to begin listing possible portfolio assignments from courses at your high school. Projects, independent studies, creative writing, news articles, photographs, experiments, persuasive essays, artwork, and sports letters look great in a portfolio, particularly if they are accompanied by student reflections. Use Protocol #11 to identify portfolio elements you may want to seek out from the faculty. How could you persuade other teachers to include such assignments in their regular courses?

Protocol #11

Portfolio Content: Seeking Portfolio Artifacts from Academic Courses

Think either about the standards or subject divisions that organize your curriculum. In order to get an appropriate representation of different areas, which courses might produce evidence for students to illustrate their learning? What kinds of assignments might work best? What standards might a student meet through those products?

What courses already produce portfolio elements?	What products (projects, papers, etc.) would fit a portfolio?	What standards might be applied?
What subject areas or standards are not well represented?	What assignments and products in these areas could help?	What standards are not yet included?

How could your team encourage teachers to include portfolio tasks in their existing courses?

Portfolio technology

Under most conditions, portfolios as physical forms can take up a lot of space. If they are course-based, each course can quickly generate a thick binder. If they are continuous over the high school years, they can expand quickly beyond control, losing their organization and their purpose; consequently, a number of high schools across the country are using electronic portfolios to gather and track student performance over the high school years. Student Web pages can be posted on the Internet, raising important privacy issues, or they can be stored on a server within the school district.

At Mount Abraham High School in Bristol, Vermont, electronic portfolios are being developed that link to transcripts (see Figure 3). When a college or employer wants to review a presentation portfolio, the student sends a Web address that opens to a transcript. The transcript includes courses, grades, and summative information, but it is also indexed to student work in the electronic portfolio (Parren, 2003). When a counselor wants a view of student work, he or she clicks on the standard that relates and the portfolio opens to the correct page (Parren, 2003).

SAMPLE ELECTRONIC PORTFOLIOS

Definitions and Examples

(provided by Lauren Kelley Parren, Portfolio Coordinator)

Standards-based transcript: A formal document listing all of the student’s courses at Mt. Abraham Union High School, with credits earned, grades, GPA, etc. listed under Fields of Knowledge columns on the left hand side of the document. Columns on the right hand side of the document indicate success in meeting the Vital Results. Numbers in these columns are keyed to the evidence found in the student’s presentation portfolio. Additionally, Mt. Abraham Union High School’s standards-based transcript includes “Applied Learning” where we honor work done by the students outside of the formal school setting. Volunteer work, athletic or musical accomplishments, religious or travel experiences, etc. are linked to Vital Result Standards in this section. Here is a blank sample from the senior year:

FIELDS OF KNOWLEDGE				VITAL RESULTS			
12 th Grade				Notes: Vital Results identified here are documented in the accompanying electronic portfolio. Please click on the Vital Result number to go to the sample of student work demonstrating success at meeting that standard.			
		Credit	Grade	Communication	Problem Solving	Personal Development	Social Responsibility
Arts, Language, Literature							
History, Social Science							
Science, Math, Technology							
Other Courses							
	SUMMARY						
Applied Learning							
Class Rank:			Cumulative GPA		Other		
<u>Distinctions:</u>							
ADVISOR COMMENTS							

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Figure 3: Key Components of Personalized Learning at Mt. Abraham Union High School

FIELDS OF KNOWLEDGE				VITAL RESULTS			
11 th Grade				Notes: Vital Results identified here are documented in the accompanying electronic portfolio. Please click on the Vital Result number to go to the sample of student work demonstrating success at meeting that standard.			
		Credits	Grade	Communication	Problem Solving	Personal Development	Social Responsibility
Arts, Language, Literature	Short Story	.5	A				
	American Studies	.5/.5	A/A	<u>1.9,1.13,1.12,1.7,</u>			
	English	.5/.5	A-/A	<u>1.8</u>			
	Spanish 3 A/B			<u>1.6</u>			
History, Social Science	American Studies History	.5/.5	A/A		<u>2.6</u>		
Science, Math, Technology	Calculus AP A/B	.5/.5	B+/B+		<u>2.5</u>		
	Physics A/B	.7/.7	A+/A+		<u>2.2</u>		
Other Courses	Keyboarding	.5	A				
	Senior Project	.5	Pass				
SUMMARY		6.9	3.9				
Applied Learning	Varsity Soccer				<u>2.8,2.9</u>	<u>3.1,3.5,3.6,3.1</u>	
	Track and Field Varsity			1.13,1.15		<u>0</u>	
	Student School Board Representative, Student Senate				2.6	<u>3.1,3.5,3.6,3.1</u>	4.2
	Socially Conscious Youth					<u>0</u>	4.1
	Mountain Soccer School					3.7,3.13	4.2
<u>Class Rank</u>				<u>Cumulative GPA</u>		<u>Other</u>	
<u>Distinctions:</u> First Team Lake Division Soccer, National Honor Society, Academic Excellence							

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Figure 4. A sample of an actual student’s standards-based transcript

Note that links are also made to “Distinctions,” where interviewers may see evidence of accomplishment in the forms of certificates, newspaper articles, letters, etc. This document is viewed as a Web page, generally speaking, but may be burned on a CD or DVD to be mailed to interviewers. It makes the most sense when viewed electronically with the student’s electronic presentation portfolio (see Figure 5).

An electronic presentation portfolio is a collection of the student’s best works, linked to Vermont’s Vital Result Standards and to an electronic, standards-based transcript. Each student creates his or her own style of portfolio, so the portfolios express the student’s individuality, but all portfolios contain sections for Communication, Problem Solving, Personal Development, Civic and Social Responsibility, and Standards-Based Transcript. There is a table of contents for each of the major Vital Results, listing the titles of the evidence of work as well as the specific standard the work documents; e.g., “Hitler Hype,” Vermont Standard 1.8 Reports. If an interviewer would like to read the specific evidence the state of Vermont expects for that standard, they click on the number (1.8 in this example) and they are linked to the Vermont Standards document.



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Figure 5. An example of an Electronic Presentation Portfolio.

The folio is a method for helping students keep track of the work they are doing toward achieving standards and meeting large goals. In the case of the academy, students and teachers will select appropriate standards and create a matrix of opportunities and outcomes. All student work will be stored electronically in the folio, available for review and discussion by teachers, students, and mentors. At the end of each semester, students will select samples of their best work and enter them in their presentation portfolio and standards-based transcript.



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Figure 6. An example of an Electronic Presentation Portfolio.

3. PRESENTATIONS

Student presentations—also called roundtables, exhibitions, or demonstrations—often anchor a personalized learning program. Student presentations put the student in the spotlight, often in front of teachers, peers, parents, and community members. Standing in front of important people, each student must present the work he or she has completed within the PLP framework, defend its virtues to the group, and explain how it serves the student’s aspirations and understanding. Student presentations can focus on single products or a range of work, including:

- The results of a senior project or special assignment;
- A writing portfolio;
- A collection of experiments from one subject area;
- General standards for graduation, with evidence across subjects;
- The whole range of the curriculum.

No doubt, public presentations create intensity. They also help gather support from the whole school community for student work that improves in quality as students gain experience in presenting.

What the literature says about presentations

Student presentations or exhibitions are not like book reports. Designed well, they ask a student to collect evidence from a variety of areas showing that they have learned independently and met a major standard or school goal. Because the audience of a presentation (parents, friends, administrators) may not be familiar with specific subject areas, students have to represent the meaning of what they know and explain how they learned it. Tyrone Jones at University Heights High School used a metaphor to explain the difference:

“

Think of the exhibition as a part of the season at U.H.H.S. You play in many exhibitions throughout the year. This depends on how many projects you get during a semester. At the end of the semester, you present a bunch of projects in a roundtable—this is like making the play-offs. When you’ve presented your work at a Mastery or Distinguished level, you can graduate and say, “I’m going to Disney World.” (Tyrone Jones, 1996)

At Central Park East High School in Manhattan, final exhibitions represent all four years of learning.

“*When they enter the last phase—the senior institute—students take on the task of completing fourteen portfolios full of work, including seven major presentations in such areas as math, science, literature, the arts, community service and apprenticeship, and autobiography. These presentations are made to a graduation committee consisting of at least two faculty members, an adult of the student’s choice, and another student, and are carried out with enormous seriousness and zeal.*” (Meier, 1995)

Presentations in any format put students at the center of the learning process. Like any other activity, presentations can lose their focus unless they are tied to the main purpose of personalized learning in your school. Unless they are also built into particular courses and assignments, they may require of students a formidable amount of extra preparation. Once they are organized, student presentation nights easily become a community celebration, vastly increasing the community’s sense of what it is capable of producing. Who will set up the presentations? Who will help students prepare? How can students gain access to overheads, handouts, or projectors? As in all personalized learning, presentations become easiest when students do their own set-up.

Protocol #12 asks your team to consider three different kinds of presentations, or exhibitions: one focusing on course-based learning, one focusing on subject area standards, and the last focusing on the whole range of student learning, to help you determine the format that best suits your school’s purpose.

Protocol #12

Preparing for Student Presentations

Select a format that best fits your purpose statement from the six choices below. Then list the tasks your team would face in trying to institute presentations in your school setting.

What kinds of presentations best fit the purpose and organization you are considering?

Course-based _____

Portfolio-based _____

Subject area _____

Special project _____

Skills-based _____

Standards-based _____

What kinds of student presentations could help personalize the learning at your school?

What will the students need?

How can teachers help?

How can presentations be organized?

Who should make up the audience for student presentations?

How can presentations be scheduled?

GOING PUBLIC IN KEY DIMENSION #3

A Graphic Representation of Parts Creating a Whole Process

Your team has worked through a number of options for Personal Learning Plans, portfolios, and presentations, accepting some ideas, modifying others, and leaving yet others behind. Can you illustrate your team proposal in a graphic representation such as those that introduced this section (pp. 51, 52)? The following two steps may help:

- 1) Begin by listing all the components of your idea for a personalized program, being sure your team understands and accepts them;
- 2) Arrange those components in a pattern that shows the flow from one component to the next.

Components of our personalized learning program



Proposed flowchart



Be prepared to explain your program representation to others, receiving feedback that lets you adjust your presentation before taking it to other audiences. Your graphic may need reworking as you go. Aim for a final product on one page of newsprint.

Key Dimension #4: ASSESSMENT

Time	Activity & Description	Materials
10 minutes	<p>Key Dimension #4: Assessing Personalized Learning</p> <p>This section includes two distinctive forms of assessment:</p> <ol style="list-style-type: none">1) Assessment of Student Work guides students to use standards and criteria to prepare their presentations;2) Program Assessment helps teams decide how they will measure their progress in program development. <p>As facilitator, you may want to focus attention more on one than the other.</p> <p>Explain that assessment should support each aspect of a personalized learning program. When students develop PLPs, formative assessment can guide them toward their goals and help them recognize progress or new opportunity. In portfolio development, students can use assessment rubrics to refine and improve their work against the same standards others will use to evaluate it. Assessment via rubrics can also help students organize their work for evaluation using the same scales that will be used in evaluation.</p> <p>Assessment is used in program development to decide whether changes instituted are having a desired effect. Collecting assessment data for selected indicators of progress while a program is growing gives a school change team the ability to argue for support when they succeed, or to argue for more support when progress is not yet visible.</p>	
20 minutes (option)	<p>Protocol #13: Assessing Performance: Designing a Rubric for Student Presentations Across Subjects</p> <p>Protocol #13 gives teams a chance to collaboratively design a rubric they would use to assess any of the products or presentations that make up their program design. In introducing the task, explain that the collective design of assessment rubrics helps ensure that the teachers involved will be using a similar perspective while assessing student work. Setting criteria that reflect both the standards selected and the task at hand is a balancing act. The indicators for each criterion should be related closely enough to allow students to climb their way up from poor performance to high performance with feedback from their teachers or parents.</p>	Protocol #13

Key Dimension #4: Continued

Time	Activity & Description	Materials
20 minutes	<p>Protocol #14: Assessing Program Development: Tracking Incidents Toward Program Adaptation</p> <p>This protocol guides teams through the analysis of incidents while a program is under development. In general, any incident from school life is a fair target for analysis. By selecting an incident from recent memory and following the pattern in Protocol #13, teams should be able to come up with program adjustments that are consensual.</p>	Protocol #14
20 minutes (option)	<p>Going Public: Selecting Indicators for Progress in Program Development</p> <p>More formally, a team can decide to identify indicators for progress that the school will regard as valid and persuasive. Explain that school-level indicators will prove more convincing by far than classroom-level incidents, though both are invaluable in program adaptation. Selecting school-level indicators may quiet the nerves of those in the community who favor accountability systems.</p>	Going Public #4 Worksheet

Key Dimension #4

Assessing Personalized Learning



Schools are historically bad at demonstrating their own effectiveness. They don't show, or even know how to show, the community learning that they assert is happening in their school. The requirement to show learning in ways other than through standardized test scores forces schools to think about the illustration and demonstration of learning to the unique public they serve.” (Gray-Bennett, 2003)

As Adria Steinberg points out, some small high schools such as the Met have very little difficulty explaining their success, both in college admissions and in impact on the community:



On June 9, 2000, forty-three people received their high school diplomas from the Metropolitan Career and Technical Center [the MET]—the first graduating class of this unique state-run high school in Providence, Rhode Island. Every MET graduate applied and was accepted to at least one college, many receiving substantial financial aid packages—an unusual circumstance for an urban school in which seventy percent of the parents did not go beyond high school. All but three plan to enter college in the fall... Upon entering the MET, the class of 2000 looked very much like their peers in the Providence School System.” (Steinberg, 2001)

This level of success results from a personalized high school system in which each student pursues individual plans and produces evidence of learning that is assessed against a few common standards.

Personalized learning and the standards movement have changed the character of high school assessment and grading. Assessment has become a critical part of the teaching process, letting students know what is expected of them and how to take

steps to improve their performance. Assessment of personalized learning also lets educators know how well they have designed support so they can adapt their processes and improve performance.

This segment of the workshop focuses on two related issues:

1. Rubric for assessing presentations (pp. 90-97):

How can educators design rubrics that help students direct their own efforts toward improvement?

2. Tracking progress of personalization (pp. 98-102):

How can educators gather evidence that lets them see how personalized learning is evolving toward goals they have set for their program?

Whether you are tracking student progress or discussing incidents that reflect the health of your program, the main purpose is to promote adjustments rather than make judgments.

1. RUBRICS FOR ASSESSING PRESENTATIONS

In conventional teaching, students face the same challenge and respond in a similar fashion. Quiz grades, for example, are marked on the same scale and reported as a percentage correct. In assessing open-ended questions in essays or reports, teachers use a letter grade or number to represent the relative strength of student work, often against criteria that are not clearly stated. When assessing a student's performance, teachers are learning how to design rubrics that show how the performance relates to a number of performance expectations, often connected to school, state, or national standards. Assignments in a learner-centered classroom are challenging and require students to use their minds rather than just reproduce, recall, or restate knowledge. Instead, students are asked to engage in reasoning processes—doing comparisons, analyzing errors, inducing or deducing conclusions, making decisions and solving problems—processes that encourage them to produce new knowledge (McCombs & Whisler, 1997).

What will students do to represent what they have learned? In standards-based design, we usually look for two kinds of performance:

1. **Culminating task:** The final product or exhibition in which students organize and represent all they have learned;

2. **Enabling tasks:** Assignments along the road that let students develop the skills and knowledge they need to complete the final performance.

Let's say that each student in the class has been assigned a "client" who wants to travel around South America to discover the roots of modern culture in the area. The culminating task might include a complete itinerary for the client, with routes, costs, special events, and sites of interest. To prepare the students for the final exhibition, the teacher would design enabling, or scaffolding, tasks in a sequence that focuses on the critical elements of the assignment. As a result, each student would present a unique product, consisting of parts that are similar, as often required by standards.

The A1 Travel Agency

Culminating task: Design a complete three-week itinerary for Mr. and Mrs. Dowager, who want to discover how modern South American culture grew from its native and European roots. They want to spend no more than \$5000 on the trip.

Enabling tasks:

Map travel routes	Identify examples of modern culture
Estimate costs	Identify pre-Columbian sites
Arrange cultural events	Convert dollars to local currency
Design travel brochure (Triptik)	Create budget

The list is almost inexhaustible. Deciding what tasks to assign depends on the standards you choose to measure student performance.

If students remain unaware of the purposes of authentic tasks and their use in assessment, the projects they complete in high school may be no more memorable than answers to standardized items in norm-referenced assessment tests. At the least, students should be able to understand the meaning of the standards that will be applied to their projects and performances and use assessment criteria to measure their own progress. They also should be able to reflect on the meaning of assessment results and use them to redirect their own learning. If an assessment task is authentic, students should understand how well they did, how they achieved their results,

how to achieve better results, and how the task reflects the need for high performance in the world that waits for them outside the school.

Standards-based rubrics are developing as a method for assessing student work that has no common subject. Rubrics are scoring guides that let students figure out how to perform well; at the same time, they allow teachers (parents and support people) to assess student progress toward a standard or goal and lend help along the way. Rather than simply explaining a grade, a rubric shows students how to achieve the desired level of performance, the way a ladder shows us how to climb. The rubric for a culminating task shows students how they will be evaluated at the end of a unit. Rubrics for enabling tasks help students acquire the knowledge and skills they need to develop their final performance. In standards-based teaching, teachers hand out the rubrics at the same time they give the assignments—or they hand out a blank rubric with a standard and let students fill in criteria and benchmarks to “discover” the attributes of quality work.

- **A rubric** contains all the information students need to perform well on a performance task;
- **The task** itself is a brief description of the challenge students aim to meet;
- **The standards** are general expectations that help students understand the educational purpose for their work;
- **Criteria** clarify the standards by listing the qualities of the work that will be assessed;
- **Indicators** describe levels of performance for each criterion with enough detail to help students see how to improve their performance.

In a personalized class, it is not uncommon to watch 25 students using the same rubric to develop projects that are completely unique.

Rubrics have done a great deal to put students at the center of the learning process. In its infancy, the standards movement generated an enormous number of rubrics, reflecting perhaps the range of specific information students were expected to absorb. More recently, rubrics are being used to focus on a few essential purposes for student learning, such as writing essays, presenting a research report, analyzing data to develop a personal position, or understanding the demands of the adult workplace. Schools such as the Met in Providence, University Heights High School in the Bronx, Noble High School in Maine, and Souhegan High School in New Hampshire use a limited number of common rubrics to assess products in relation to common

expectations for all students. Used across subjects and the 9-12 grade continuum, common rubrics support the continuity of learning and help students understand the concept of quality as it is applied to different performances.

An illustration of assessing community-based learning

A teacher at Montpelier High School in Vermont created a rubric to guide students toward success in their independently designed community-based learning experiences, a credit-bearing course that sends almost half of Montpelier's students into their community to work and learn. The rubric on the next two pages (see Figure 7) reflects Vermont's Vital Results standards, but it also focuses attention on the purpose of community-based learning at the high school. Teachers, community mentors, and students use the rubric to develop and troubleshoot their portfolio entries. Family members, other teachers, and peers use the same rubric to evaluate the final presentations. In dialogue, students, teachers, and community members looking at student work can refine their expectations and form a consensus about the value of community-based learning.

Community-based Learning Assessment Rubric Montpelier High School (Gibson, 2000)

STUDENT _____ DATE _____

COMMUNITY SUPERVISOR _____ LEARNING SITE _____

To the student: Please rate yourself on the following criteria and provide additional comments below. Tell what you will do to continue to improve in this area.

To the community supervisor: Please compare your ratings with the student's on the following criteria, then have a talk with the student about both positive and negative differences.

Rating: 1= Never, 2= Seldom, 3= Some, 4= Usually, 5= Always

	Student Rating	Supervisor Rating
Communication		
1. Listens attentively for directions	1 2 3 4 5	1 2 3 4 5
2. Seeks new information when needed	1 2 3 4 5	1 2 3 4 5
3. Makes needs and concerns known; states opinions	1 2 3 4 5	1 2 3 4 5
4. Uses appropriate language	1 2 3 4 5	1 2 3 4 5
Problem Solving		
1. Shows initiative, openness, and persistence in solving problems	1 2 3 4 5	1 2 3 4 5
2. Asks questions to clarify and help with finding solutions	1 2 3 4 5	1 2 3 4 5
3. Chooses and uses effective problem solving methods	1 2 3 4 5	1 2 3 4 5
4. Can apply math, writing, and creative approaches as needed	1 2 3 4 5	1 2 3 4 5

	Student Rating	Supervisor Rating
Personal Development		
1. Accepts constructive criticism	1 2 3 4 5	1 2 3 4 5
2. Maintains a positive attitude	1 2 3 4 5	1 2 3 4 5
3. Makes healthy choices	1 2 3 4 5	1 2 3 4 5
4. Develops productive relationships	1 2 3 4 5	1 2 3 4 5
5. Demonstrates dependability and productivity	1 2 3 4 5	1 2 3 4 5
Social Responsibility		
1. Maintains acceptable attendance record	1 2 3 4 5	1 2 3 4 5
2. Respects the rights of others and appreciates their roles	1 2 3 4 5	1 2 3 4 5
3. Works cooperatively with co-workers	1 2 3 4 5	1 2 3 4 5
4. Uses safe workplace procedures	1 2 3 4 5	1 2 3 4 5

Figure 7. Rubric for Community-Based Learning in Montpelier High School, Montpelier, VT

From *Dynamics of Change in High School Teaching: A Study of Innovation in Five Vermont Professional Development Schools*, (2000), p. 114, published by The Education Alliance at Brown University.

DESIGNING A RUBRIC FOR STUDENT PRESENTATIONS OR PORTFOLIO ELEMENTS

Basically, designing a rubric requires educators to begin with their larger purposes or standards, then develop a simple guide for students to use in developing and revising their work:

Purpose: In light of the purpose you chose earlier, what would you expect students to be able to do as a result of their projects or presentations?

Communicate ideas	Solve problems
Plan an event	Improve conditions in the community

Task: What assignments could you develop to help students meet these expectations?

E.g., Make a persuasive speech	Design a house
Solve a real-world problem	Create a budget
Defend a political position	Use different media in presentation

Criteria: What qualities would you want to observe in student work?

Neatness	Interview tabulations
Multiple options	APA format
Research citations	Computerized media

Indicators: What recognizable features show that student work meets the criteria?

For interview tabulations, for example:

Level 1: Indirect reference to interviews

Level 2: Quotations used to support main argument

Level 3: Quotations organized to reflect the weight of evidence

Level 4: Interviews tabulated to reflect the range and weight of evidence

Protocol #13 asks your team to design a rubric you might use to assess student work in the program you are creating. Rubrics need a series of field tests to become reliable and generally applicable across assignments. Still, work with your team to create a rubric that shows students how their work on a task will be assessed against a standard using specific criteria that can be described on a scale of indicators for high performance, and the steps to get there.

Protocol #13

Assessing Performance: Designing a Rubric for Student Presentations Across Subjects

Developing Rubrics for Student Exhibitions				
Task, Standard, Criteria, and Indicators for Performance				
Performance Task: What will the students do?				
Standards: What expectations will they meet?				
Scale: →	Indicators For each criterion, what features distinguish?			
	poor performance			high performance
Criteria: What qualities define success? ↓	1 Where is it? Points =	2 Not yet Points =	3 Got it Points =	4 Nailed it Points =
1				
2				
3				
4				
5				

Feedback: How will you encourage improvement?

Grade: How will you assess performance?

2. TRACKING PROGRESS OF PERSONALIZATION

Assessing student work during exhibitions or demonstrations can reveal a great deal about students, but it can also reveal the need for ongoing program adjustment.

When students regularly fail to meet criteria set by a faculty to support quality in student work, the fault usually lies with the program rather than the students. Program refinement depends on tracking indicators of progress and problems and making adjustments that either streamline the process or improve the result.

To teachers, adjustment-on-the-run is a part of daily life in the classroom. When the whole group looks as if it is going to sleep, teachers slip in a challenge, shift toward examples, start a reflective exercise, or try a film. The rapid adjustments that are so commonplace in teaching become nearly impossible when an entire team is working collaboratively to design and refine a whole program sequence. Collecting indicators of progress and making adjustments consensually keeps all members of the team working in the same direction and also creates a valuable team-learning opportunity. The problem-solving dialogue below illustrates in six steps a team discussion that leads from the appearance of a problem in daily experience to the design of a better approach that might improve learning. Teams can use the six questions in the left column to make sure that choices are well conceived and consensual within the team.

Collecting and Assessing	Team Members
1) Evidence What has happened in your experience to clarify the situation you face?	Paul: I am having some difficulty getting students to use their “fears” to generate inquiry questions. The idea of fear seems to shut them down, particularly the young women.
2) Goal What did you set out to accomplish?	Jane: I haven’t seen that in my class, but I do see how students would rather choose a different MAPS reflection sheet.

<p>2) Goal , continued</p>	<p>Iris: I have some young guys who just snickered when I asked them to list their fears. We're not reaching all students.</p>
<p>3) Meaning Why are events such as these happening?</p>	<p>Jane: A good number of these kids seem to want to protect themselves from each other. Paul: Yeh, the girls seem afraid to give the boys any ammo to use in teasing. Greg: Can't blame them for that. Until we reduce general estrangement here, kids will fear each other.</p>
<p>4) Options What adaptations might make the processes work better?</p>	<p>Iris: What if we change the MAPS sheet to read "Concerns"? Paul: We could convert the fear discussion to a written assignment. Greg: I am for dropping the Fears exercise until the students are less fearful.</p>
<p>5) Choice What shall we try?</p>	<p>Jane: Let's drop the word "Fears" and substitute "Concerns." Iris: And let's try a take-home assignment to guarantee privacy. Paul: Still some kids may not complete the homework. Greg: I can try it, because my group has not gotten to Fears yet.</p>
<p>6) Test Can we see improvement?</p>	<p>Jane: Maybe you could bring the homework with you next time we meet, so we can see if they are using the exercise to generate inquiry questions for themselves?</p>

Protocol #14 provides a format for teams to use in tracking progress toward the goals they have set and making adjustments that can improve the way the program works.

Protocol #14

Assessing Program Development: Tracking Incidents Toward Program Adaptation

The following sequence illustrates the way tracking indicators can lead to program adjustments:

1. Individually, brainstorm specific incidents that have occurred in your school that relate to the project you are developing;
2. Select an incident for group discussion;
3. With the protocol in view, organize a discussion that leads from incidents to possible adaptations.

Incidents What has happened to clarify the issue?	
Goal What are we trying to accomplish?	
Meaning Why is it happening?	
Options What might work?	
Choice What shall we try?	
Test Can we see improvement?	

In thinking about assessment and preparing to lead change, selecting indicators of progress and using them to mark progress lays the foundation for sustainable change.

Still, not all indicators have the same value to members of the school community who are needed to support an initiative. Generally, teachers rely on short-term indicators of progress that help them adjust their daily work: absentee rates in classes, homework handed in, or grades during a term, for example. Administrators, on the other hand, usually look for longer-term evidence of change that might help during budget negotiations: college application rates, standardized test scores, and reduced dropout rates. Parents might be more concerned with attitude surveys and behavioral issues. Since short-term measures have to precede long-term measures, a good assessment plan should contain both.

Going Public #4 asks your team to develop short and longer-term indicators you could use to monitor progress. (Remember, it is not the team's responsibility to manage all the assessment tasks; teams try to distribute tasks to others in the school who are better able to complete them.)

GOING PUBLIC IN KEY DIMENSION #4

Selecting Indicators for Progress in Program Development

The purpose of this exercise is to identify indicators you can use to assess progress toward your vision and program purpose. Review your vision statement and the purpose you developed earlier. Then, review the program you aim to put together. Finally, list the indicators you would want to see changing for the better over the short and longer term. Indicators should fit your purpose, but the following indicators have been used extensively to monitor program design:

Grades	Absenteeism	Dropout
Discipline referrals	SAT prep	Course selection
Time on task	Parent involvement	Student satisfaction (surveys)
College application	Breakage and vandalism	Course loads
Assignments complete	Test scores	Interviews with students

What indicators best fit your program and purpose?	Short-term expectations	Longer-term expectations
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How could your school organize to collect this information?

Key Dimension #5: LEADERSHIP

Time	Activity & Description	Materials
30 minutes	<p>Key Dimension #5: Leadership</p> <p>The introduction to this section stresses the role of informal or collaborative leadership in program design. Its purpose is to show school change teams that they can use their considerable influence to prepare the larger school structure to accept and adopt their plan. Stress the importance of collegial leadership within a profession, allowing teachers special influence with regard to curriculum and instruction. Also stress that crossing boundaries that divide a school can sometimes be awkward.</p>	
15 minutes	<p>Protocol #15: Discussion of Leadership Across Organizational Boundaries</p> <p>Protocol #15 presents six statements that may restrict change at different levels of the organization. A team can use the statements to brainstorm strategies that may help to change minds within their organization. The strategies may not be applicable to the team's school.</p> <p>Consider asking teams to use the same structure to identify constraints within their own school and brainstorm strategies that might work.</p>	Protocol #15
30 minutes	<p>Protocol #16: Strategy Development: Preparing the Whole Community for Systemic Change</p> <p>Emphasize that the time has come for teams to return to their schools with a general plan that can be written up as a proposal. In preparation for this, Protocol #16 asks teams to sketch an overall strategy. They may also need time to prioritize activities in their plan so the approach will prove both feasible and effective.</p> <p>Creating a timeline of major steps for the coming year may help them see that the steps they plan to take are manageable.</p>	Protocol #16

Key Dimension #5: Continued

Time	Activity & Description	Materials
20 minutes	<p>Going Public #5: Leadership Through Action Planning</p> <p>The final protocol asks the team to distribute parts of the plan for introducing personalized learning to individual members of the team. Remind the teams that some early work, such as writing a draft proposal or short prospectus, may be essential for later parts to work. The action plan should remain a flexible document throughout the period of introduction. Fresh problems and opportunities change the processes we design to make change happen.</p> <p>In going public, individuals within a team can explain the roles they will adopt and the steps they will take to make the whole proposal work.</p>	<p>Action Plan Worksheet</p>
15 minutes	<p>Closing: "Freewrite"</p> <p>As the session ends, a freewrite of five minutes can help team members see what they have accomplished and also explain areas of confusion or concern. When the freewrite has ended, members can either read their thoughts to their team or to the whole group. This approach has a greater effect when the whole group simply listens to what others have said. At the end, you can invite individuals to comment on what they have heard.</p>	

Key Dimension #5

Collaborative Leadership

It is all about leadership. Each of us is a leader in certain ways at certain times. In a setting that is changing from the status quo to a new order, those who initiate change must become leaders as advocates for the change. The status quo has familiarity and vested interests, while the new way of doing things is unknown and, for many, untested. Accordingly, change agents and innovators must not only hold and articulate the vision for the change, but also create conditions for hopefulness and positive energy to accompany the change. A single leader can make little progress in a complex organization; a group of leaders who share the same vision, purpose, and general strategy can go further, simply by working over the same wall simultaneously and sharing their experience as they move forward.

This final segment of the Personalized Learning workshop will help you answer two major questions:

- 1. Collaborative leadership:** How can a change team use the unique talents of its members to organize a multi-faceted personalization initiative?
- 2. Strategic leadership:** How can the team organize activities to engage other leaders in other parts of the school?

The discovery of leadership networks in all successful organizations is leading us to explore the process by which innovation and growth occur in complex settings, such as schools (Clarke, et al., 1998). On the basis of this part of the personalization workshop, your team can develop an action plan that reaches out across the school for leaders with something to contribute.

Leadership through interaction

Successful school leadership cannot emerge from any single office or person in a school structure. Schools are simply too busy and complex to respond to initiatives from a single source. Instead, leadership takes place when many members of the same school recognize the same problem, develop a shared vision, aim their efforts toward aspects of the situation over which they have some control, and join with

others to make progress. Michael Fullen has noted this phenomenon in many schools:

“ *Successful innovation depended on a systemic view of leadership that allows leadership to emerge from multiple sources and different situations simultaneously rather than from formal authority as the only source for leadership.*” (Fullen, 1993)

Teams such as yours are proving highly effective in making change happen in schools. Leadership through networks may prove successful in high school personalization because formal leadership tends to isolate individuals within tightly constrained roles, reducing their exposure to other perspectives and the machinery of the larger system. Once they cross boundaries and interact, information and ideas proliferate. As Margarette Wheatley points out:

“ *Innovation is fostered by information gathered from new connections; from insights gained by journeys into other disciplines or places; from active collegial networks and fluid, open boundaries. Innovation arises from ongoing circles of exchange, where information is not just accumulated or stored, but created.*” (Wheatley, 1994)

Milbrey McLaughlin reviewed a failed policy-driven change and noted:

“ *Change strategies rooted in the natural networks of teachers—in their professional associations—may be more effective than strategies that adhere solely to the delivery structure outlined by the policy system. We have learned that we cannot mandate what matters to effective practice; the challenge lies in understanding how policy can enable and facilitate it.*” (McLaughlin & Talbert, 1990)

Collaborative leadership includes students, teachers, administrators, community members, state officials, and faculty from higher education engaging in new rela-

tionships, crossing boundaries, and adapting changing roles. This new cadre of interactive leaders places a premium on the development of teaching and learning contexts that support learning for all students and for members of the school community. In a way, it becomes the overarching and driving force that unites school culture, vision, and goals on behalf of student learning. In a study of change in high schools in Vermont, Clarke and his colleagues concluded that change happens when events at one level of organization influence other levels to adapt and grow in concert with each other (Clarke, Aiken, & Sullivan, 1999). Crossing organizational boundaries to gather support for change is a team task that is still rare in public high schools.

Collaborative leadership

In systemic school change, we look for the influence of two kinds of leaders:

- 1) **Formal leaders** in any organization derive their influence from the position they fill. Principals, superintendents, teachers, and bus drivers all have formal leadership roles, but those roles are restricted by the boundaries of their formal positions.
- 2) **Collaborative leaders**, on the other hand, lead on behalf of a goal or purpose, working to make something happen whether or not the goal falls within their position description.

Formal leaders often have organizational resources (money and formal authority) at their disposal. Collaborative leaders may not control money or people, but they can exert enormous influence over the way things happen. Collaborative leadership often occurs within professions where equal status is assumed. Collaborative leaders can more freely pursue their purposes across the organizational lines that divide a school into fiefdoms. This segment is designed to help you activate collaborative or informal leadership within your school, beginning with your team.

While formal leadership appears to have advantages over informal or collaborative leadership, informal leaders can influence change more freely than formal leaders because they are not confined to one specific part of the system. For change to succeed, all parts of the system need to be brought together in new ways. For a new program to emerge and remain viable, for example, students have to see it as attractive; teachers have to see it as consistent with their own work; parents have to recognize its educational value; principals have to move money and people into sufficient space; superintendents have to reallocate budgets and support; and the

governing group has to agree that the program will be treated favorably during budget negotiations. No formal leader has control over all these players. Change depends on keeping a clear goal in view and weaving connections among people so they begin to coordinate their work in support of that goal. Collaborative leadership occurs through a network of relationships formed around a common purpose.

Facing the leadership challenge

Collaborative leaders face a challenging situation. Public high schools have been organized to serve not a single purpose, but many. They are often compartmentalized so members of the community share very little common experience. Nevertheless, personalization depends on the active engagement of people throughout the organization, most of whom have grown comfortable in narrow roles where their exposure to each other, and to school-wide concerns, is limited. Protocol #15 asserts six statements about high school change that may affect the way you take on the challenge of leadership.

Protocol #15

Discussion of Leadership Across Organizational Boundaries

Review each of the following six statements about high school change that may affect the way you take on the challenge of leadership. If the statements are true of your school, discuss as a team the leadership initiative that might make a difference in the success of your program plans.

Statements	Leadership initiatives that might help change the system?
1) Our school's mission does not emphasize personalized learning.	
2) Existing systems are designed to batch-process large groups.	
3) Our curriculum consists of course requirements.	
4) Our faculty specializes in subject area knowledge.	
5) Advising takes place in the Guidance Department.	
6) Our students have learned to receive education passively.	

Preparing to lead across boundaries

What specific techniques can a collaborative leadership team apply? Without cash, collaborative leaders have to learn to exert influence over the way the members of an organization think. To consider changing what they have done habitually, often for a long period of time, members of an organization must begin to see their current experience through a new lens and recognize a problem connected to current practice. Then they must come to understand the range of solutions to the problem they have begun to see. Finally, they must be willing to try and adapt different ways of doing their work, ways that may not be as comfortable at the beginning as their established techniques. No single step can accomplish all this. But several tactics such as those below can constitute a long-term strategy that slowly moves all parts of the school into agreement:

Options in Strategy Development

Pilot project	Study group	Action research project
Letter to the paper	After-school meeting	School visits
Community forum	Student survey	Telephone call
Office visit	Course for teachers	Parent meeting
Written proposal	Board presentation	Exhibitions of student work
Data analysis	Student presentation	Teacher meetings
Faculty meetings	Department meetings	Parent nights
Team teaching	MEd course projects	Newsletter
Model projects	Student interviews	Student projects

One informal leader in a Vermont high school led the reform of the 9th grade curriculum by asking colleagues from the school to drink coffee around her pool during the summer. For any shared purpose, a team can begin to line up activities such as these, organize people to carry them out and keep a keen eye on the goal being developed.

Your team may assume leadership responsibility for the ideas, goals, programs, and projects that you have discussed so far. Your team may ask you, indeed, to become the goal-leader for some aspect of the process you have begun to imagine. Remember, goal-leaders have no formal authority; they derive their power from relationships they make with others: kids, parents, teachers, and administrators. Involving others is the key to change.

Protocol #16 asks you to select an important goal from your earlier discussions—or the whole idea of your program—and identify strategic steps you could take to help the community understand, accept, and pursue the goal with you. Looking at all six levels of school organization:

1. What actions or events could you organize as a team that would move your school community toward your goal?
2. Which of them appear essential, in light of the towering system? How many steps can you afford to try? Who will lead those steps? Who will lead the whole strategy?

As you discuss leadership options for your goal, consider strategies at all six organizational levels in Protocol #16.

Protocol #16

Strategy Development: Preparing the Whole Community for Systemic Change

Levels of the System		Ideas for Consideration	Leaders
Community Vision Expectations for the high school	E.g. *School board *Parents *Business groups *Community agencies *Colleges		
Systems Structures and processes that allow adaptation and expansion of effort	E.g. *Schedules *Faculty contracts *Guidance availability *Yearly budgeting *Department structure *Bus schedules		
Curriculum Grade level course sequences, tracks or core courses	E.g. *Core courses *Distribution requirements *Graduation requirements *Carnegie units *Testing systems		
Teaching Fitting instruction to student goals, talents, and stylistic preferences	E.g. *Course syllabi *Multiple "sections" *Faculty availability *Time for planning *Faculty development		
Advising and Mentoring Fitting student plans to multiple options for learning	E.g. *Faculty awareness *Faculty isolation *Mentor awareness *Contact time *Space		
Learning Meeting personal aspirations and adult standards in real and academic settings	E.g. * Student passivity/fear * Student schedules * Suspicion and rebellion * Cliques and tracks		

Who will take primary leadership for coordinating activities?

GOING PUBLIC IN KEY DIMENSION #5

Leadership Through Action Planning

An action plan is simply a method for linking specific activities to the goals they serve—and the people who agree to take leadership responsibility for making something happen for the team. Target dates and indicators of completion can help create a solid feel to the plan, ensuring that pieces will not fall through the cracks.

Action Planning

Using the Action Plan Worksheet provided on the following page, create an action plan for bringing this work back to your school, bearing in mind the question:

What will I do differently tomorrow to create and sustain a personalized learning program in my school?

Remember to include the following in your action plan:

- Process for creating buy-in
- Planning along four dimensions: purpose, organization, program content, assessment
- Advisor training and support

Final Reflection

Five-minute “Freewrite” on Change

A workshop on personalized learning can be unsettling. Teams struggle for the balance they need to continue. Individuals search for a productive place in discussions. As discussion continues, the size of the task ahead expands. As the task expands, so does anxiety about success and failure. But experiences such as these also bring change, along with adjustments in perception, knowledge, confidence, or viewpoint.

Unless a team takes time to reflect, significant changes often pass unnoticed—and even begin to fade. As your team prepares to return to school, take five minutes to think about and write down the changes you have noticed in yourself or the team. How might these changes affect what happens when you return to your established role? When five minutes have passed, each person should read the reflections to the rest of the team, looking for surprises among similarities and differences in the group.



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*In a setting that is changing from
the status quo to a new order,
those who initiate change must become
leaders as advocates for the change.*



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