



What's Next? Personalizing Student Learning for Engagement, Equity and Excellence With the MASSachusetts Personalized Learning Edtech Consortium

Citation

Morgan, André Sandell. 2019. What's Next? Personalizing Student Learning for Engagement, Equity and Excellence With the MASSachusetts Personalized Learning Edtech Consortium. Doctoral dissertation, Harvard Graduate School of Education.

Permanent link

<http://nrs.harvard.edu/urn-3:HUL.InstRepos:42063280>

Terms of Use

This article was downloaded from Harvard University's DASH repository, and is made available under the terms and conditions applicable to Other Posted Material, as set forth at <http://nrs.harvard.edu/urn-3:HUL.InstRepos:dash.current.terms-of-use#LAA>

Share Your Story

The Harvard community has made this article openly available. Please share how this access benefits you. [Submit a story](#).

[Accessibility](#)

What's Next? Personalizing Student Learning for Engagement, Equity and Excellence
with the Massachusetts Personalized Learning Edtech Consortium

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
André Sandell Morgan

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

April 2019

@ 2019
André Morgan
All Rights Reserved

Dedication

This capstone is dedicated to the extraordinary people whose paths I have intersected during my time in Boston. Your unyielding support and encouragement have enriched my spirit, and inspired me to think about my future contributions to the education sector, with a sense of humanistic responsibility, compassion and respect. I appreciate each of you.

Acknowledgements

To the LearnLaunch, MAPLE and MISL Teams:

I would like to thank the teams at the LearnLaunch Institute (Amy, Ann, Ben, Brittany, David, Eileen, Eleisha, Ellie, Heather, Hum, Jay, Jean and Nat), who opened up to me in candid conversations, encouraged me in my journey of learning and reflection, and were willing to trust my recommendations.

To My Capstone Committee:

Dr. Deborah Jewell-Sherman, your guidance, support and mentorship during my time at Harvard has been invaluable. You have been instrumental in helping to shape my experiences and considerations in how I will re-enter the education sector as a leader of change.

Dr. Mary Grassa O'Neill, your encouragement, push and ongoing care has not only contributed to my collective learning, but has made me to be a better and more formidable leader today, than I was when we first met.

Dr. Ann Koufman-Frederick, you have been a tremendous mentor and guide; not only can I think “outside the box,” but I now have the capability to “make the box larger” for greater impacts.

To My Extended Support:

Lindsie Almquist (soon to be Dr. Almquist), you have been one of my most fervent cheerleaders; egging me on in each step of this journey has meant a great deal.

Dr. Elton Amos, your continued words, “*fidem tibi habeo*,” have pushed me beyond my comfort zones, in order that I might strive for bigger and better impacts, and help others to do the same.

Marcel Ampey, you supported me unconditionally and ensured I had all I needed to be successful.

Dr. David Anthony, you encouraged me on my current path, and I will always be grateful.

Dr. Kathy Boudett, you have shown me how to use my talents to influence human and system outcomes, and also how to create continual success opportunities for practitioners and students through data utilization.

Dr. Elizabeth City, you have helped me to think about the education sector more strategically and consider how to develop and use my leadership skills to meet the adaptive challenges required to achieve transformational organizational change.

Laura Clos, you have been influential in helping me to recognize the importance of coalescing strategy with leadership in order to facilitate successful organizational change.

Krista Goldstine-Cole (soon to be Dr. Goldstine-Cole), you have shown me the value of combining research and practice as a means of informing my leadership and also helping stakeholders in the education sector to improve on and expand their work.

Simone Fried (soon to be Dr. Fried), your review and recommendations for how I might develop, improve and build on this work were valued.

James Fripp, your careful review and recommendations for improving this capstone were indispensable and appreciated.

Dr. James Honan, your confidence in my abilities and unrelenting reinforcement has shown me that believing in self is the first step to success, and in that, lay my capabilities to radically change the education sector.

Dr. Conley Hughes, each time we interact, I feel motivated to do much more for others in order to improve their position. I appreciate you for being a great example to follow and for consistently looking out for my best interests.

Dr. Moreen Hughes, your ongoing encouragement has inspired me to identify the values that will impact each aspect of my leadership.

Dr. Howard McLendon, you have been, and continue to be, a brother's keeper; you have shown me how to maximize human impacts through strategic engagement.

Sandra Morgan-Moore, you are my biggest supporter and inspiration, always encouraging me to use my talents and lean on my values to make the types of decisions that continually benefit others.

Justin Morgan, my vision for and capacity to help young people is broader, wider and full of potential, because of you.

Dr. Irvin Scott, your counsel has been instrumental in my leadership development; you have helped me to better understand the value and advantages of critical feedback, and how to utilize it as a mechanism for self-improvement.

Table of Contents

I. Abstract.....	6
II. Introduction	7
III. Review of Knowledge for Action (RKA).....	18
IV. Description, Evidence, and Analysis of the Strategic Project	35
V. Implications for Self.....	67
VI. Implications for Site	72
VI. Implications for Sector	78
VIII. Conclusion	80
References.....	84
Artifacts and Appendices.....	89
Appendix 1: How MAPLE will achieve goals in 2018-2019.....	89
Appendix 2: MAPLE Definition of Personalized Learning	90
Appendix 3: Equity and Personalized Learning	91
Appendix 4: Work Tasks	92
Appendix 5: MISL Coach School Visit Plan.....	93
Appendix 6: What Will Success Look Like?.....	95
Appendix 7: MAPLE/BC Research Partnership.....	96

I. Abstract

This capstone outlines the work I completed during a 10-month residency experience, serving as a Deputy Academic Officer at the LearnLaunch Institute, an education technology organization, based in Boston, Massachusetts. LearnLaunch has established itself as a hub for education innovators in New England, particularly those who see the potential for digital technologies to improve K-12 educational outcomes.

In this capstone, I combine research of, and reflection on, my strategic project, which entailed: 1) developing a strategy for scaling and sustaining personalized learning and 2) crafting an approach to bridge personalized learning and equity of opportunity and achievement. This work was completed to support LearnLaunch's non-profit area, the MAPLE (MAssachusetts Personalized Learning EdTech) Consortium.

The Review of Knowledge for Action (RKA) component will serve as a citation analysis and systematic review for the components of my strategic project. In the RKA, I have documented my survey of relevant literature across methods to scale and sustain personalized (student-centered) learning and examine the correlation between personalized learning and equity of opportunity and achievement. Based on research, interviews with practitioners, application of a change management framework and professional experiences, I have suggested that in order to best deliver on its mission, MAPLE may need to consider and utilize a multi-faceted set of options. Specifically, these options include: 1) better supporting districts and schools with a complex definition of personalized learning, 2) developing metrics that help support the impacts of personalized learning and 3) supporting campus leaders in the creation of culturally responsive schools and classrooms.

In conclusion, this capstone seeks to determine a way for entities like MAPLE to scale and sustain efforts relating to personalized learning, and help make equity of opportunity and achievement actionable. Through the results of this strategic project, I have demonstrated how education technology and non-profit organizations can better deliver on their supports to K-12 districts and schools in the U.S.

“When you change the way you look at things, the things you look at will change.”

Wayne Dyer

II. Introduction

How I Selected the LearnLaunch Institute/MAPLE

The first time I met Kiernan was on an overcast morning in May. I was heading to a Boston area high school to interview black male students and their teachers for a research project I was conducting during my second year as a doctoral student at the Harvard Graduate School of Education. My bus was slightly delayed which made me late for my meeting with the campus principal. As I ran towards the entrance of the school, I heard a voice behind me remark, “Glad I’m not the only one running behind today.” I broke into a smile and Kiernan said, “I’ll see you in about an hour; I’m the first interview on your list.”

Kiernan was late for his meeting. He was sent to the Vice-Principal’s office for inappropriate conduct in class. I asked him what happened, and he responded:

“The same s*** that always goes down here at this school. So, I’m sitting in math...I really dislike the class...and we are talking about linear equations and inequalities, and I didn’t understand the slope intercept form. So, I raised my hand, asked my question and the teacher, doesn’t answer the question; instead, he sends me to an area in the classroom with the desktops to take a module on what we are talking about. This guy, who sits behind me, asked a similar question. Oh, and by the way, he’s white. Can you guess what happened? The teacher answers his question and it wasn’t much different than mine.”

I asked how the situation escalated. Kiernan says, “I called him a languid mofo and got sent to the office.” He first laughs, then got silent for a second and then said, “It always seems like I’m being ignored here and not just in this class, but in most of my classes. I always hear if you work hard, do well in school and follow the rules, you can be

and do whatever you want. If only it were true for me. Hell, if only that were true for us.” The look I gave Kiernan makes it clear I understood his reference to “us.”

In that moment, I recalled a similar encounter when I was a high school student and the recollection allowed me to empathize with Kiernan’s disappointment. I advised Kiernan not to get angry at the problem, but counseled him on how to be tactical in how he assessed and handled it. I expounded further in my comments and when I finished, a smile crossed his face.

Kiernan seemed quite interested in what I was saying, so we continued talking on this topic for a few more minutes. When I mentioned we were transitioning to the discussion that was the reason for our meeting, Kiernan asked about my experiences (as a black man) at Harvard. It was not what I intended to discuss in our conversation, but since it appeared my next meeting was delayed and we had some time to spare, I obliged. As we were talking, I randomly mentioned I was days away from deciding on a residency assignment (and I explained what it was in relation to my degree program). Kiernan asked me about my options and when I shared them, he asked, “What do you know the least about today? And, uhm, where can you learn the most to help guys who look like us?” His sage youthful insight led me to choose the LearnLaunch Institute as my residency site.

The LearnLaunch Institute

The LearnLaunch Institute is an education technology organization, committed to increasing student achievement in Massachusetts public schools through the adoption of digital technologies; LearnLaunch serves as a convener of the education technology (edtech) ecosystem in the Greater Boston and New England areas (LLI, 2019). The

LearnLaunch Institute educates, engages, supports and connects the regional education innovation community through initiatives, based on the following four core areas

(*Educate, Engage, Support and Connect*) (LLI, 2019):

- I. **Educate:** The annual “Across Boundaries” conference convenes the education innovation community around compelling topics to drive the sector forward.
- II. **Engage:** 35-45 events are hosted annually, including meet-ups, classes, pitch competitions, and panel discussions, on education sector trends. These gatherings allow members in the education technology space opportunities to interact with each other and establish and deepen relationships.
- III. **Support:** Eleven Boston public schools were supported in their adoption of personalized and blended learning through an initiative funded by the Gates Foundation – MASSNET (Massachusetts School Network Edtech Testbed). The goal was to engage teachers in evaluating software in a way that excites them and builds knowledge that can be shared with product developers and other educators. This program is continuing in two schools in Brockton, Massachusetts.
- IV. **Connect:** Education technology entrepreneurs are supported by being connected with educators and the latest education innovations.

About the MAPLE Consortium

The LearnLaunch Institute is comprised of both “for-profit” and “not-for-profit” departments. My residency experience emerged in, and impacted, the non-profit side of

the organization, which operates as the Massachusetts Personalized Learning Edtech (MAPLE) Consortium. Started in December 2016, the MAPLE consortium is a public-private partnership with the Massachusetts Department of Elementary and Secondary Education. The goal of MAPLE is to help K-12 public districts and schools move away from traditional education models and towards personalized learning approaches that encourage student self-direction, mastery, personal learning paths and engagement. MAPLE is achieving its goals via a set of strategies in three areas: *Engage, Support and Change* (Appendix 1).

MAPLE is led by Executive Director, David O' Connor, who hails from the business community. Complementing his role is Dr. Ann Koufman-Frederick, a former district Superintendent in Massachusetts, who serves as the Chief Academic Officer of LearnLaunch, and also as my residency mentor and supervisor.

Under the MAPLE umbrella is a new support, the MAPLE Innovative School Leaders (MISL) Network. As a MAPLE program, MISL supports the collective mission of MAPLE. One distinction between the two initiatives is MAPLE's work is largely focused on suburban and rural district leadership; MISL's emphasis is on supporting leadership teams in individual schools, primarily in urban areas. MAPLE started the MISL initiative in response to district leaders in the Commonwealth calling for support for campus leaders to help them consider and implement models of personalized learning. The MISL initiative is managed by a Project Director, Amy O'Connell, who is a former campus administrator. Other staff that support MAPLE include Stella Gryllos, Digital Curate (dCURATE) Program Director, Ellie Miller, Program Coordinator and several consultants.

Why Advocacy for Personalized Learning?

MAPLE understands how rapidly the world is changing; how automation and advanced technologies are altering the U.S. economy and making it harder for people without the requisite skills to find and maintain viable employment. MAPLE's core value relates to equality for students; that is, to do everything possible to ensure each student in the Commonwealth of Massachusetts has the opportunity to succeed tomorrow in a stronger America. The venue to do this is through advocacy and support of personalized learning strategies. Personalized learning can provide teachers an opportunity to meaningfully connect with students to drive achievement in the classroom and in subsequent life (Lentino, 2017). Not only is personalized learning perceived to prepare diverse students for the future global workforce, it may impel student improvements, while having a potential to address equity of opportunity and achievement gaps in Massachusetts schools.

Why Push Personalized Learning in Massachusetts?

The Commonwealth of Massachusetts is widely viewed as having some of the highest achieving schools in the U.S. (Tucker, 2016), with an aggregated high-school dropout rate of just two percent (Wong, 2016). Additionally, Massachusetts high schoolers were among the top-performing students in the world, according to the results of the 2012 Program for International Student Assessment (PISA) exam (Khalid, 2013).

However, its public schools are not succeeding for all students. The Commonwealth's successes are juxtaposed with stubborn achievement gaps and concentrations of poverty that have made across-the-board strides all but impossible (Wong, 2016). Income-based disparities in academic performance have grown and the

Commonwealth's achievement gap has become the third highest in the U.S. (Rosen, 2016). MAPLE and its newest program MISL, desire to reach the students who are not being well served by the state's current public education system, including students who live in poverty. These students comprise those from ethnic minority groups (including those who speak English as a second language) and students with disabilities and other special needs (MDESE, 2013).

Further, Massachusetts employers that want to hire students who graduate from Massachusetts high schools are not convinced that students are graduating with the skills necessary to be successful in a 21st century job market. In a 2016 survey directed to the Commonwealth's business communities and created by the Massachusetts Business Alliance for Education (MBAE), 75% of respondents reported difficulty in hiring employees with the right skills; 72% of respondents agreed public schools have to change how they serve students in order to help them meet workforce needs.

Skills for the 21st Century Job Market



75% of employers report difficulty hiring employees with the right skills



Percentage of business leaders who agree that schools must change to meet workforce needs

Source: 2016 Survey by Mass Business Alliance for Education

What are the Issues Faced by MAPLE?

MAPLE (and MISL) are funded entirely by grants from the Nellie Mae Education Foundation (NMEF) and the Barr Foundation. These funding streams have allowed MAPLE to deepen efforts to connect K-12 districts and schools across the state, by providing opportunities for district and school leaders to learn from each other, discover new ideas to transform teaching and learning, and pilot learning strategies that reflect one or more of the following six foundation elements of personalized learning. These elements are reflected in the MAPLE definition of personalized learning (Appendix 2):

1. **Competency-based progression:** Working within a framework of curriculum standards and high expectations.
2. **Personal connections:** Supporting deep personal connections between students, teachers and other adults.
3. **Personal learning pathways:** Motivating students to reach their goals and allowing them to take ownership of their learning.
4. **Flexible learning environments:** Maintaining high flexibility in the what, when, how and where of learning.
5. **Learner profiles:** Allowing teachers to gain detailed and timely knowledge of students and to use data to guide instruction.
6. **Technology:** Allowing the above five elements to be implemented effectively, affordably, and at scale.

MAPLE is relatively new in its work. The 2018-2019 year is MAPLE's second full school year of operation, while the same year is MISL's first full school year of operation. The LearnLaunch Institute extended an invitation to me to join them as a

resident to identify adaptive strategies that could enable MAPLE to continue their efforts beyond grant funding so Commonwealth districts and schools do not lose the supports they are currently receiving from MAPLE to design and implement personalized learning strategies. Those strategies can potentially help to close opportunity and achievement gaps in schools across the state. While I have contributed to accomplishing this mission, there is still a great deal of work to engage so that MAPLE can continue beyond 2021 and MISL beyond 2020.

Statement of the Problem / Scope of Strategic Project

Through engagement with MAPLE, I surmise the entity faces the following challenges:

The definition of personalized learning is complex. While MAPLE crafted a definition of personalized learning, in partnership with the Massachusetts Department of Elementary and Secondary Education, MAPLE relies on districts and schools to link their practices to the MAPLE definition of personalized learning. Subsequently, some districts and schools question what personalized learning actually looks like in practice. Further, MAPLE does not suggest specific pathways to personalized learning models for member districts and schools to follow. In other words, when a district/campus indicates an intention to partner with MAPLE, they are not provided with specific personalized learning strategies (such as a roadmap) to follow to achieve aspirational goals. Instead, districts and schools have the flexibility to develop strategies that are appropriate in their context, and which align to one or more of six foundation elements of personalized learning that are listed on the prior page of this capstone. While this can be both a challenge and an opportunity for districts and schools,

this ambiguity can make it difficult for districts and campuses to identify strategies that reflect personalized learning.

Equity is not clearly defined in MAPLE's mission. While equity is an integral part of the MAPLE mission, MAPLE has yet to decipher how to make the idea of equity actionable for its teams, and the member districts and schools. In its toolkits to districts and campuses, MAPLE advocates personalized learning as an approach that helps to close opportunity and achievement gaps in Massachusetts schools, but does not indicate how that occurs (Appendix 3). To date, no empirical evidence yet supports personalized learning as a strategy that closes opportunity and achievement gaps; hence, it has been difficult for MAPLE to quantify equity to its members as a viable outcome of personalized learning. Grant funders are asking for MAPLE to demonstrate equity-related outcomes following the grant periods, but the challenges are validating these outcomes and also showing the benefits of personalized learning after only one or two years of work. Not having proof-points of the correlation between personalized learning strategies and equitable outcomes may threaten continued support from existing funders and limit potential funders from investing in MAPLE. If MAPLE is to continue operating beyond grant support, in its current mission, they will need strategies that can help them continue their support of districts and schools.

Outcomes

To meet the needs of the MAPLE initiatives, the outcomes of my work during my residency assignment were as follows:

1. Identify significant, productive strategies for the scalability and sustainable implementation of personalized learning; this includes approaches (e.g., developing a district superintendent school committee toolkit) that correlate personalized learning strategies and issues of equity of achievement and opportunity to better support MAPLE members in accelerating student learning.
2. Assess current and emerging MAPLE strategies with consortium members, and gauge whether it is more feasible to extend those methodologies and/or design new strategies to meet sustainability-related challenges. In other words, in collaboration with the Chief Academic Officer of LearnLaunch, I will assess MAPLE's existing programming (which is evolving), engage in human-centered design thinking processes and recommend strategies (where applicable), for continuous improvement on the methodologies.
3. Recommend practices to reinforce sustainability as a core value within the LearnLaunch organization; this includes identifying and developing a mechanism to address issues of equity of opportunity and achievement. Equity is an integral part of MAPLE's mission and deciphering how to make it actionable for the MAPLE teams, as well as the member districts and schools, was necessary.
4. Along with senior leadership, help to ensure MAPLE is resilient to future changes.

Review of Knowledge for Action

The review of knowledge for action component will serve as a citation analysis and systematic review for the components of my strategic project. This capstone explores the extant research on how not-for-profit organizations can support K-12 districts and schools in scaling and sustaining models of personalized learning, and also examines the promise for personalized learning to achieve measures of equity of opportunity and achievement.

III. Review of Knowledge for Action (RKA)

Like many non-profit organizations, MAPLE faces complex challenges of how to scale and sustain its work, and continue programming with the threat of reduced funding. This RKA will assess these challenges by considering the extant research, practices in the field and reflections from my own personal and professional experiences. This RKA outlines the following challenges:

1. Personalized learning (including scaling and sustainability).
2. Correlating equity and personalized learning.

I will further examine how one might lead and operationalize the changes that are needed by MAPLE, by assessing two leadership supports; the *Demography Isn't Destiny* framework and the *Kotter 8-Step Process for Leading Change*.

About Personalized Learning

Research in personalized learning first emerged in 1984 when educational psychologist, Benjamin Bloom, challenged the U.S. academic community to replicate, at scale, the effectiveness of one-to-one or small-group tutoring. In his research, Bloom found that students who received personalized instruction, outperformed ninety-eight percent of those who had not received this type of instruction (1984). What Bloom understood is that learning is a cooperative task between teacher and students, one that is most effective when an expert teacher is differentiating instruction and providing regular corrective feedback based on the needs of each student (1984).

As technology became more prevalent in the U.S. and found its way to the education sector, Bloom's idea began to hold possibilities for students. To that end, U.S. policymakers across the political spectrum have begun advocating for the public

education sector to engage in digital technologies as a way to transform public education (U.S. Department of Education, 2016). Professional associations, education technology organizations and philanthropic foundations are joining policymakers in their advocacy and lending their support to districts and schools to incorporate digital technologies in their curriculums. These organizations are framing digital technologies as essential tools to promote personalized learning, as a pathway to prepare students for a 21st century economy (Philanthropy News Digest, 2018). Investors, such as Bill Gates and Mark Zuckerberg, are backing personalized learning initiatives with hundreds of millions of dollars (Herold, 2017) in hopes that students will be given the knowledge needed to experience life-long successes. States across the U.S. are continuing to adopt laws and policies around personalized learning and school districts across the U.S. (rural, suburban and urban) are embracing this trend (Herold, 2017).

While personalized learning is taking root in many public school districts in the U.S., it is coming under scrutiny, as one of its greatest challenges is the lack of clarity around its definition (Herold, 2017). There is no universal definition of personalized learning; hence, what does personalized learning mean in the context of teaching and learning? And what does it look like in practice? Across the U.S. education sector, there are broad and varied definitions of personalized learning. According to Cavanagh (2014), in an ever-changing world of educational technology, the term personalized learning seems to be everywhere, though there is not yet a shared definition of what it means. In 2019, the U.S. education sector does not appear to be any further along in narrowing this omnipresent phrase. According to Rubin and Sanford (2018), the term personalized learning remains largely amorphous, but has the power to energize or

polarize depending on the audience. The Glossary on Education Reform, created by the Great Schools Partnership, a not-for-profit organization working to redesign public education in the U.S., offers the following (neutral) definition of personalized learning; one that has resonated with K-12 organizations:

“A diverse variety of educational programs, learning experiences, instructional approaches and academic support strategies that are intended to address the distinct learning needs, interests, aspirations, or cultural backgrounds of individual students (2015).”

The Great Schools Partnership notes the term personalized learning (and related synonyms) have become more widely used in prior years to describe everything from supplemental software programs to whole school redesigns (2015, Herold, 2017). Even education reformers have started using the term widely; to such a degree, that personalized learning has now morphed into two schemas.

One faction defines personalized learning as a “blended learning” strategy, in which teacher-student interaction is blended with computerized instruction (Horn, Staker, & Christensen, 2014). Proponents of this strategy contend that students receive consistent personalized instruction tailored to their specific skill needs (Wagner & Dintersmith, 2015), whereas critics of this strategy argue that blended learning limits social interactions between teachers and students, and consequently, compromises the skills that are necessary for 21st century success (Domenech, Sherman & Brown, 2016).

The other group offers a different definition; one that is consistent with the meaning of personalized learning espoused in this capstone. It is used to describe “student-centered” instruction, encourages collaborative work among groups of students and integrates learning experiences outside of the classroom, all while fostering learner independence, student voice and choice, and student agency (JJF & CCSSO, 2018;

Zmuda, Curtis & Ullman, 2015). While this camp is not opposed to blended learning strategies, it does perceive the use of computers as an opportunity to complement social interaction and collaboration among students. The interest in personalized, student-centered education builds from a powerful combination of economic, scientific, and technological forces, along with a better understanding of what truly constitutes college and career readiness for an ever-changing global marketplace (JFF & CCSSO, 2018).

The excitement around personalized learning continues to grow in the U.S. Innovative learning strategies and instructional approaches are emerging and taking root in schools across the nation. This level of excitement for personalized learning is also growing in the U.S. technology sector. For example, Facebook’s Mark Zuckerberg and his wife, Priscilla Chan, are using their Chan Zuckerberg initiative to invest billions of dollars into personalized learning efforts (Herold, 2017). Zuckerberg regularly articulates his goal of personalized learning for all students; such ambition is becoming commonplace in the edtech industry (Philanthropy News Digest, 2018).

Methods to Scale and Sustain Personalized Learning

This capstone defines scaling as, “the expansion of an idea or innovation, technology or skill, advocacy or policy change (GEO, 2011, page 2)” and sustainability as a “resulting model that attracts and effectively uses enough and the right kinds of resources necessary to achieve long-term outcome goals (Edgington, 2017, page 1). “

Despite limited evidence to support the benefits of personalized learning, it is scaling rapidly on local and regional levels, and nationally. What is creating this enthusiasm around personalized learning? According to Peter Green, a former English teacher and now blog education writer who examines K-12 public education policies and

practices, public education is exacerbated by one educational fact of life: public schools are not supposed to discard the outliers (2018). Green notes the reason for the rapid scaling of personalized learning is primarily based on the mission of the U.S. education system, which is not to educate most students, but to educate all students, regardless of difference (2018). If we accept this reasoning, we may better understand why public school districts are getting on the personalized learning band-wagon, absent empirical evidence.

In a local context, Rubin and Sanford (2018) explore scalability at the school level as a way to reach all students; they suggest schools begin their transition to personalized learning by creating and running pilot programs. In what the authors define as a “bottom-up viability” model, schools will be most successful if they create internal design teams, comprised of campus staff (administrators, teachers and other practitioner staff). The design teams shoulder the task of suggesting, developing and implementing the pilot programs, and then the team assesses the pilot to determine program success, all while simultaneously gauging the enthusiasm for the pilot (Rubin & Sanford, 2018). An added goal of a pilot program is to understand how well the implementation of personalized learning pathways can position teachers (and students) for future success (Rubin & Sanford, 2018). Following implementation, design teams can determine teacher and staff interest (or lack thereof) by creating opportunities for follow-up and feedback collection. Feedback is a tool that can offer the design team enough information to shape the possible next steps for scaling on that campus (Rubin & Sanford, 2018).

Another strategy for scaling personalized learning is offered by KnowledgeWorks, a not-for-profit organization based in Cincinnati, Ohio, which has

personalized learning at the center of its mission statement. The group believes scaling is most impactful when it is not done individually, but collectively. KnowledgeWorks partners with school districts in Ohio to identify the conditions for scale that exist at a district level; they affirm the district level is the right-sized level of implementation because it is closest to the schools, and to the students, as well as the teachers (2019). While not opposed to pilot programs in individual schools, as recommended by Rubin and Sanford (2018), KnowledgeWorks believes the scaling of personalized learning at the district level can ensure its connection to vision, curriculum and instruction, formative assessment, and student supports in every school in the district, and not just in a select few (2019).

To better support their assertions, KnowledgeWorks published, “*District Conditions for Scale: A Practical Guide to Scaling Personalized Learning*” and a follow-up report titled, “*A State Policy Framework for Scaling Personalized Learning.*” The latter report builds on the earlier commentary by offering a roadmap to districts and local school boards state-wide on the components that should be in place to effectively scale personalized learning (2015). While both reports suggest personalized learning as a measure to reach all students in the state, they fail to offer specific ways districts can implement the suggested strategies and do not offer empirical evidence that supports their recommendations. It appears school districts across Ohio are accepting and adhering to KnowledgeWorks’ recommendations to scale personalized learning, just like so many other leaders and educators across the country.

Bellwether Education, a national nonprofit headquartered in Boston, Massachusetts, crafted a *Policy Playbook for Personalized Learning* that offers fifteen

policy ideas with specific recommendations for addressing three crucial ways in which policymakers can help fuel the growth of innovative approaches to personalized learning (2014). Both the Bellwether and KnowledgeWorks reports are considered resources for districts to understand how local and state policies can serve as supports for broader change. As a means to promote scaling on the local and state levels, both organizations have recommended advocacy of personalized learning through the development of policy.

Federally, personalized learning is supported by The Every Student Succeeds Act (ESSA). Enacted in December 2015, the ESSA gives states and localities flexibility to redefine student success, create innovative assessment pilots and work with local communities on redesigning education systems to be more flexible, responsive and connected to the real world (Patrick, Worthen, Frost & Gentz, 2016). ESSA specifically allows schools to use federal funding to support personalized learning initiatives and includes opportunities for schools to support experimentation and innovation (ESSA, 2015).

In a report on best practices to sustain personalized learning in K-12 education in the U.S., authors, Gross, Tuchman and Patrick (2018) note in order to continue personalized learning, a national shift toward more personalized learning experiences must occur at the federal level; this, according to the authors, will challenge educators, school leaders, districts and education partners, in each state, to come to the table with ideas and practices on how to personalize learning for students. Similar to the KnowledgeWorks and Bellweather reports, the authors note that policy is the appropriate vehicle to institutionalize personalized learning; they also note that as much as policy and

systems create the space for personalized learning, district and school administrators will need to do more to encourage teachers and school leaders to shift the culture in their schools to personalization (2018). This is where MAPLE can offer value to districts and schools.

Personalized learning is becoming such a fixture in the U.S. education sector that organizations from the business sector are supporting its implementation. For example, global management consulting firm, McKinsey and Company, has joined Facebook and Microsoft in advocating for personalized learning in public schools across the U.S. Serving a mix of public and private institutions, the company's social sector division, conducted and funded a study, and drafted findings on how school districts could effectively scale and sustain personalized learning (McKinsey & Company, 2016). In the account, the authors note sustaining personalized learning requires deep sets of partnerships between school districts and local organizations that can provide ongoing support, which could vary depending on the instructional models (McKinsey & Company, 2016). Different from Bellwether, KnowledgeWorks, and Rubin and Sanford, McKinsey and Company suggested partnerships with community organizations as the method for scaling and sustaining personalized learning. Supporters, according to the report, could include: local funding partners, education technology organizations and businesses and community groups, which all provide enrichment opportunities for students outside of schools. Ties between school districts and community partners could be important in the overall program of personalized learning in a district (McKinsey & Company, 2016). Similar to the aforementioned reports, this assessment offered no empirical evidence of the yields of personalized learning strategies.

Personalized Learning and Equity

While personalized learning can be a powerful tool for educational equity, and some advocates have linked personalized learning to equity outcomes, equity is not a traditional focus of personalized learning; yet proponents of personalized learning strategies advocate a correlation with equity of opportunity and achievement. The teacher, who personalizes learning experiences for students, is the one who has to apply an equity lens to their work (Smith & Brazer, 2016). Simply using a station-rotation model will not automatically lead to more equitable outcomes for students. Educators engaged in this work have to intentionally use an equity lens to give driving purpose to personalizing learning for students (Blankstein, Noguera & Kelly, 2016). This, in turn, can influence how they utilize personalized learning tools in service of that goal.

How personalized learning reforms normalize, interrupt and/or transform structural and spatial inequalities, such as race, gender, nationality and class represent a pressing question for those interested in advancing equity of opportunity and achievement in education. While personalized learning is heralded as a strategy to reach all students, some critics wonder if it actually positively impacts student demographics that face inequitable opportunities in schools; such student groups include: students of color, students with disabilities, students learning English, and students from low income families. According to Gorski (2018), these student groups have not, and do not, enjoy the same level of economic and educational support as their wealthier peers (Gorski, 2018). This assertion is applicable in the Commonwealth of Massachusetts. Although heralded as a leader in education, the Massachusetts Education Equity Partnership (2018)

notes that underneath the state's number one ranking, are glaring and persistent disparities that separate low-income students and those of color from their peers.

Gorski (2018) believes one solution to reaching marginalized students is for teachers (and campus administrators) to change their beliefs about these students and their families, and create classrooms that reflect the cultures and experiences of these students. While changing teacher mindsets can help promote equity and related outcomes in public schools, there are other considerations.

According to Yvette Jackson (2018), Chief Executive Officer of the National Urban Alliance, “the challenge with achieving equity of opportunity and achievement in public schools is not just accomplishing outcomes, but defining what equity really means.” Jackson notes:

“What makes equity so hard to achieve are its many facets, so numerous and complex they are hard to define. This inability to define equity handily is especially confounding for urban districts (page 1).”

Jackson asserts that in order for equity to be achieved, it must work in tandem with pedagogy. When (practitioners) are truly committed to equity, (they) design pedagogy that achieves its original purpose: “To lead a child” for self-actualization and self-transcendence; self-actualization that enables students to thrive in society, and self-transcendence that motivates them to contribute to society (Gladwell, 2008; Jackson, 2018, 2011).

Perhaps more importantly for practitioners and administrators is an understanding of what equity is and how it can (and should) be applied to help eradicate inequities among students. The education ecosystem has a narrow definition of inequity and how it manifests, often focusing on explicit and intentional racism (equityXdesign, 2016). While

it is no longer socially acceptable to treat others differently because of the color of their skin, their poverty level, their language ability or their special needs, many people, including U.S. public school teachers, hold implicit biases that impact their behaviors and allow for structural and systemic inequities to remain (equityXdesign, 2016). This is the reason equity is essential to address in the U.S. education sector.

In a 2017 study conducted by the RAND Corporation, to correlate personalized learning and equity, researchers found that personalized learning helped students from varied backgrounds who were significantly below national norms in mathematics and reading, move closer to [those] norms during the school year (Pane, Steiner, Baird & Hamilton, 2017, pages 10-11).

While equity of opportunity and achievement appear to be complementary to personalized learning, there is little empirical evidence to support their actual relationship with one another. Some practitioners agree personalized learning can be a tool for practitioners seeking to provide equitable outcomes for students (Jones & Casey, 2015; Fisher, 2014). The lens of equity can become a driving purpose behind personalized learning and that purpose can then empower personalized learning strategies to become tools with which to provide all students equitable access to grade-level or above content and skills (Sturgis & Jones, 2017).

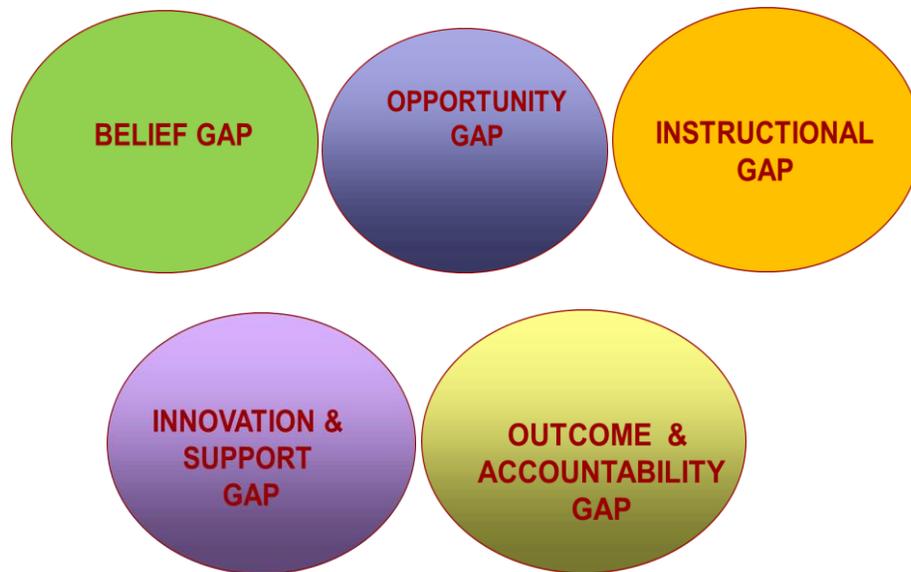
Operationalizing the Changes

Initially, I considered situating this capstone in the *Demography Isn't Destiny* leadership framework. Developed by Dr. Deborah Jewell-Sherman, Professor of Practice at the Harvard Graduate School of Education and former Superintendent of the Richmond Public Schools, this model explores how leaders can realize intended outcomes when

they consider change management from a system-level perspective. I identified this framework as one that could be helpful to achieve the varied outcomes of my strategic project. This model explores five areas of consideration: a) belief gaps, 2) opportunity and capacity gaps, 3) instruction gaps, 4) innovation and support gaps and 5) accountability gaps. In this structure, to obtain buy-in from administrators and teachers on shifting instructional strategies from traditional models to personalized learning approaches, administrators and teachers must:

1. Believe all students, regardless of difference, can learn content, and develop college and career ready, and workforce skills,
2. Offer variable levels of opportunity for students to help them reach their capacity,
3. Alter their methods of instruction,
4. Identify opportunities to implement innovations, and
5. Close opportunity and achievement gaps with students and hold themselves accountable for student outcomes.

This framework (visual included on next page) could help address the complexity and contexts of personalized learning and identify how these strategies could connect to equity of opportunity and achievement.



As I became more familiar with the goals of MAPLE and better understood what my site needed from my strategic project, I began to consider the Kotter 8-step process for leading change due to its inclusion of “urgent action” as one of the process steps. Introduced by John Kotter, leadership and change management professor at the Harvard Business School in his 1996 book, “Leading Change,” this model sets out 8 key steps of the change process, arguing that neglecting any of the steps can be enough for the whole change initiative to fail (Kotter, 1996).

I opted to situate this capstone in the 8-step process for leading change because MAPLE needed an immediate strategy to consider their future work and impacts. Without a strategy that stressed urgency (Kotter’s first step), services may be impacted in the near future, and internal MAPLE staff may be terminated from LearnLaunch’s employ because the resources will not be available to cover salaries and benefits. The Kotter 8-step process is a tool that can aid a system-level leader in developing a strategy for action, which was needed in my tasks. The importance of the Kotter 8-step process

framework to MAPLE is the capability to implement strategic changes expeditiously and effectively; the steps of the process are as follows:

1. Create a sense of urgency.
2. Build a guiding coalition.
3. Form a strategic vision and initiatives.
4. Enlist a volunteer army.
5. Enable action by removing barriers.
6. Generate short-term wins.
7. Sustain acceleration.
8. Institute change.



The first four steps can be looked at as an unfreezing phase of the process where resistance for change is reduced (Kotter, 1996). Steps five through seven are the transition phases, where new behaviors, values and attitudes are developed (Kotter, 1996). The last step is related to the freezing phase where changes are reinforced in the organization (Kotter, 1996). I decided on this framework to use with my strategic project because MAPLE was familiar with this framework and member districts were utilizing it in their change management efforts with schools. In this structure, to obtain buy-in from administrators and teachers on shifting instructional strategies from traditional models to personalized learning approaches, administrators and teachers must:

1. Create a compelling reason for why a district or school is engaging in a particular problem of practice and identify the target demographics for impact,
2. Get the leaders bought into the problem of practice and the importance of addressing it immediately,
3. Create a vision and plan,
4. Communicate persistently,
5. Address the systems, people and processes that are problematic,
6. Create and celebrate wins,
7. Use wins to build a case to extend the work, and
8. Make the change necessary for the district or school.

Guiding Questions

1. How can MAPLE scale and sustain its' work in the Commonwealth of Massachusetts with partner districts and schools?
2. In what way/s can personalized learning impact equity of opportunity and achievement for students?

Theory of Action

If I:

- Leverage emerging research from the field that supports personalized learning as a viable strategy for 21st century student learning;
- Utilize current and emerging MAPLE strategies to examine current programming, and recommend new strategies designed to meet scaling and sustainability-related challenges;
- Examine the complexity of MAPLE's definition of personalized learning and consider how MAPLE might best support districts and schools to navigate it; and
- Identify how personalized learning impacts equity of opportunity and achievement;

Then I Will:

- Help administrators and practitioners better understand that while there is no universal definition of personalized learning, there are elements that can help students achieve greater agency and engagement in their learning and realize increases in achievement;
- Succeed in identifying programming on personalized learning initiatives for sustainable implementation, which will help move personalized learning to

scale and allow the work of MAPLE to continue with established (and new) partner school districts;

- Help administrators and practitioners learn what is possible with personalized learning initiatives and how to accelerate the growth of personalized learning, teacher and student engagement, and student achievement; and
- Assist administrators and practitioners in understanding how personalized learning impacts equity of opportunity and achievement.

IV. Description, Evidence, and Analysis of the Strategic Project

The What and How

On July 1, 2018, I officially began my residency with the Learn Launch Institute, full of excitement, but also with moderate trepidation, because I came to MAPLE as a skeptic of personalized learning. While I was not an expert on this strategy, I was familiar with the concept and understood why public school districts across the U.S. were fascinated with this approach; it could support districts in meeting the growing demands of diverse student populations (Gross, Tuchman & Patrick, 2018). I also knew districts and campuses in the U.S. had become accustomed to discarding reform efforts and programs as quickly as they were adopting them. Given the evolution of an increasingly digital society, there will likely be more tools available to the education sector in the future to deal with the issues that have contributed to a widening nationwide achievement gap.

In my mind, personalized learning was possibly another reform effort by “for-profit” organizations with little context (and perhaps concern) around reaching and teaching low-income students, which are largely black and brown youths. Second, despite the growing popularity of personalized learning as a teaching and learning strategy, students who share my background (race and gender), are still being subjected to zero-tolerance policies in schools and falling victim to either school-dropout and/or the school-to-prison pipeline (Bell, 2015). Further, for this to be an impactful and legitimate strategy, teachers and other educators would need to become knowledgeable and skilled in educating students who are different from them, racially and economically. Research has indicated that despite initiatives to help change classroom instruction, many teachers

are not rethinking their attitudes, values and beliefs about students (and their families) that are different from them (Gorski, 2018; Howard, 2016; Cookson, 2013).

I remembered the advice of Kiernan, who is mentioned in the introduction. He asked me, “What do you know the least about today? And, where can you learn it so you can help guys who look like us?” I figured if I was going to learn information that would be useful in my future work and also impact students, who look like me, I should work on my own deficit-based mindset about personalized learning strategies and consider my residency experience as a tool that would help me to understand how personalization can solve real problems of practice in public education. On a personal level, I had two leadership goals going into residency. I wanted to gain experiences that would develop: 1) my strategic decision-making capacity and 2) coaching skills. While my skill-sets in these two areas are not deficient, I did consider that added exposure would better position me as a system-level leader, post-Harvard.

The following narrative and analysis reflect my approach to the work with MAPLE (and MISL) across 10-months (July 2018 – April 2019). My work can be categorized in four phases:

<u>PHASE</u>	<u>TIME PERIOD</u>
Diagnostic	13 weeks
Initiation	13 weeks
Implementation	13 weeks
Closing	05 weeks

The Diagnostic Period (July 2018 – September 2018)

The first 90 days with MAPLE (July – September, 2018) were extremely hectic; I came on board at a time when several projects were being planned and facilitated

simultaneously. While I was generally accustomed to multi-tasking, dealing with many juggling balls, in an area where my knowledge was developing, it felt a bit intimidating, particularly as I was getting familiar with the organization, its context, the people and the work. I was involved in multiple projects during this period and in the remaining months of my residency (Appendix 4). Each project would involve a combination of meetings, collaborative work, independent research, school site visits, interviews, and numerous conversations.

As I sat in meetings, attended events, and engaged in activities, I had some anxiety because some participants viewed me as one who was supposed to be an expert in our discussions, yet I was unclear on the MAPLE definition of personalized learning (Appendix 2). I understood personalization conceptually, but found myself regularly asking my residency supervisor, as well as members of the MAPLE team, detailed questions about personalized learning. In my mind, if I did not quite understand it, how could I help our partner districts and schools to comprehend and implement this strategy? I asked my residency supervisor how we might better explain the MAPLE definition of personal learning; she replied:

“This is interesting work because we are new at this. It’s not that there is no universal definition of personalized learning, it’s just a complex definition. Most definitions of personalized learning converge around key elements. In fact, the definitions used by the organizations that do this type of work are really similar. If we ran these definitions through *turnitin.com*, we would all be found guilty of plagiarism. In order to help our partners understand personalized learning, we (MAPLE) host activities throughout the year that members can experience; for example: 1) showcasing district personalized learning initiatives, 2) hosting monthly learning tours, at MAPLE member districts, 3) developing leadership competencies and 4) curating resources. We are becoming more proficient in this as we go along. You are really going to have an interesting time here.”

In my RKA, I note there are broad and varied definitions of personalized learning across the U.S. education sector. Hence, it became clear there would be challenges in helping districts and schools navigate this complex concept.

The diagnostic period also offered opportunities for me to become familiar with the areas of MAPLE, and begin considering the specific work I could engage that would be most beneficial to both entities.

In understanding the “definition” challenge, one of my strategic decisions in the diagnostic period was to develop an animated instructional video that was shown at the start of the MISL initiative. My thinking was, if I develop a tool that garners buy-in, it may help to begin the scale and sustainability of MAPLE’s work. My residency supervisor agreed that sharing the definition of personalized learning differently could help participants better understand the work they would engage in the subsequent months. Hence, my supervisor showed the video to commence the official program on the campus of Boston College. I had developed the video also thinking it was important to have a tool that could help support the complex narrative around personalized learning; particularly given some of our participants were hearing the term and concept for the first time. I had advocated for the video as a tool that not only made the definition easier to understand, but would also encourage the 85 participants, to implement a strategy that would not be viewed as “another thing.” I created the following two-minute video:



<https://biteable.com/watch/maple-personalized-learning-introduction-video-1953813>

While the informational video was interesting to view, I felt it had moderate impacts. At the conclusion of the summit, several participants approached me about where they felt their teams were in their understanding; the below reflects two comments, in particular:

“André, the 3-day session was great and my team got a lot from it, but honestly, we are not still clear on what personalized learning really means and where, and how, we are supposed to start this in our school.”

“The 3-day session was good, but I did not understand why so much time was spent on equity. In fact, the entire focus on unconscious bias felt like I was being attacked as a white man. Perhaps that time could have been used to draw a connection between personalized learning and equity, which I still do not understand.”

It became clear to me the next 10 months would be interesting. While we did not promise the teams they would have personalized learning and its connection to equity figured out after the MISL launch, I was a bit concerned that a lack of understanding

from some members and teams would delay their implementation activities, which in turn, could impact the outcomes we were expected to present to our funders in the forthcoming months. By the end of my diagnostic period, my residency supervisor and I decided on two tasks as part of my strategic project; I would:

- Develop 2-3 bright spot profiles of districts that were part of the MAPLE consortium who we identified as districts that were effectively implementing personalized learning in Massachusetts, and
- Coach eight school teams in the MISL network who were implementing personalized learning strategies for the first time on their campuses.

The bright spot profiles would entail work with districts in the MAPLE consortium that were implementing strategies at the district level. This aligned with the district scaling strategy offered by KnowledgeWorks, who is cited in the RKA section of this capstone. Related to the coaching portion of my strategic project, all eight teams were urban schools with high populations of students of color, students with disabilities, students learning English, and students from low-income families. These teams were all part of the same school district and none of the teams had previously engaged in efforts related to personalizing learning before their involvement with MAPLE.

Shortly after specifying my strategic project, I began work on the first bright spot profile; this included reviewing and annotating the draft started by a MAPLE consultant. Simultaneously, I planned (and facilitated) the first coaching session with each of the eight MISL teams. The agenda for the first session was to identify an initiative designed to show progress toward personalization by the end of the school year. Teams were assured they had the flexibility to develop their own strategies that were appropriate to

their contexts, but encouraged to align strategies with one or more of the six foundation elements of personalized learning that are listed in the introduction of this capstone.

Additionally, I thought it would be useful to work with the Executive Director to begin drafting a plan to extend and solicit new funding for MAPLE. Part of this work entailed completing an application of inquiry for a local foundation grant that would allow MISL to launch and implement a second year initiative. I made a strategic decision to get involved in this area because as a developing system-level leader, I understood I needed to be skilled in soliciting resources to achieve the aspirational goals and impacts of an organization.

The Initiation Period (October 2018 – December 2018)

I continued to participate in meetings and planning sessions for varied events and activities, in addition to working on the two focus areas of my strategic project. I also continued to raise inquiries about the complexity of our definition of personalized learning and how it contributed to equitable outcomes. As I better understood our mission and what we sought to accomplish to impact teaching and learning in Massachusetts public schools, I sought to develop a more focused definition that I could personally understand and also use as a talking point in my advocacy of personalized learning to districts and campuses. I found this to be particularly helpful when I was asked to conduct a presentation for a new member district's high school staff on personalized learning and relational coordination (a concept I studied during my second year at the Harvard Graduate School of Education). On the morning of the presentation, one of the program planners pulled me to the side and said:

“Hey, André, listen, thanks for being a part of today's program.

Sorry to make this request at the last minute, but I was looking at the slide deck. The slide on the definition of personalized learning.... is there a way you can maybe explain it in simpler terms for our staff? I just do not think our team is going to really get this if you use your standard definition and if they don't understand it, the session will not be as helpful as we had hoped. As you know, our Assistant Superintendent is really pushing this, but we just do not know where to begin. So, while it sounds terrible, simple, would be better and helpful.”

The slide/definition the staff member was referring is included in Appendix 2. Given a 15 minute window before the presentation began, I debated whether I would honor the request. Fortunately, I had a draft of a modified definition of personalized learning that I had worked on in the prior week and for which I had not yet shared with my supervisor. I considered MAPLE was building a relationship with this district, and I, and the MISL program director, were the MAPLE representatives on this day. One decision could help or harm the relationship; hence, I decided it was a small request that could be honored; I complied and created the below slide offering an adjusted definition:

What is Personalized Learning



Personalized learning is an opportunity to level the playing field with students. It is a set of varied strategies that include, but are not limited, to the following:

- Teacher instruction is delivered to smaller groups and individuals.
- Students move through content at their own pace
- Students practice skills with teachers and peers
- Students learn inside and outside of the classroom.
- Lessons have a next step so students can keep building on skills

In using personalized learning as a strategy, students develop the proficiencies necessary to be successful in the 21st century.

The feedback on my presentation was great, but I left a little edgy that our definition of personalized learning was still not clear to some of our MAPLE members. Or perhaps it was just was not clear to the staff person who approached me. Either way, it was helpful to have what I thought to be a less complex definition. Hence, going forward, whenever I facilitated presentations and was asked for a more nuanced definition, my adaptation was my “go-to” slide.

During the initiation period, I continued to work on the first of three bright spot profiles with what MAPLE termed a “catalyst” district; that is, a district that has spent at minimum, the last three years implementing personalized learning strategies in their schools, and is considered a leading district in Massachusetts for this work. MAPLE had hired a consultant (prior to my arrival) to facilitate the research and draft the initial district profile. The plan was for me to take over the draft, facilitate all revisions and see it through to production. MAPLE had initially identified these bright spots as case studies, but I had suggested changing the name of these documents as we were not developing a method of analysis to examine a problem; we were highlighting the building blocks and processes a district undertook to move from traditional models of instruction to personalized learning strategies. The team agreed and we began calling these summaries, bright spot profiles.

I thought this would be a relatively easy task as it appeared to be data collection, validation, and compilation, but it turned out to be a time-intensive effort. The initial draft did not include what my supervisor and I believed to be major components of the profile and obtaining those details proved to be a challenge. The target date for completion was the end of January, 2019. In our team meetings, I offered that it was

challenging to advocate for personalized learning yields without supporting evidence and made a decision to include an evidence section in the bright spot profile. The MAPLE team agreed and we began to consider how we might encourage districts and schools to develop proof-points that demonstrated personalized learning strategies were working for students. Unfortunately, bringing this point to the forefront made it difficult to meet the January deadline, as the district was not able to address this in a timely manner. In the subsequent weeks, we continued to work with the district to address the profile gaps that we had identified.

On the MISL front, I scheduled, and held the next two coaching sessions (#2 and #3) with my teams. I found that many of the campus teams were struggling with the MAPLE definition of personalized learning and attempting to figure out the appropriate starting points for implementing personalized learning strategies. I thought carefully about how I wanted to coach the teams. Understanding the outcomes MAPLE wanted from each team, I opted not to treat the coaching process as a series of general training sessions. After all, it was as much about my development as it was about MAPLE's end-of-year outcomes. While I would use my knowledge and experiences to diagnose situations and give advice (when needed), I was more interested in helping the teams to make progress in creating and developing their pilots and outcomes; this became my goal each time I facilitated a coaching session.

After several weeks of managing angst among all of the teams, the MISL program director and I decided to encourage the teams' to start with smaller (pilot) implementations. This decision aligned with the recommendation of Rubin and Sanford (2018), who is cited in the RKA section of this capstone. The authors note, an effective

way to introduce and scale personalized learning, in school settings, is through the implementation of pilot programs (2018). The MISL program director and I decided to create roadmaps for how we might conduct and maximize our sessions with the teams. I had suggested in our in-person coaching sessions, we might incorporate a format that would not only guide our time with the teams, but would also help the teams to direct their efforts. To that end, I created a MISL School Visit Plan to support our in-person visits (Appendix 5). The MISL program director was on board with this suggestion, noting:

“I did not expect the teams to have this much difficulty in figuring out a starting point for personalizing learning for students. What do we do? We really need a win with our teams if MISL is going to continue beyond one year. You have more experience in this area than I do, so if you think this will help us to help our teams move forward, I am completely on-board.”

We decided to experiment with the School Visit Plan, beginning with session # 2. We understood if this were not successful, we would need to devise another strategy. The School Visit Plan proved to be successful with most of our teams. I had also discovered there was uncertainty with each of my teams with the connection of personalized learning to equity of opportunity and achievement. Equity was a part of the MAPLE mission and was included in all of our presentations and summary overviews; however, we were challenged to make equity an actionable item for our members. In one of my in-person sessions, during this initiation period, a few of my teams seemed to be unclear on the MAPLE definition of personalized learning and how it correlated to equitable outcomes. The following is an example of one team conversation that started session # 3:

Member 1: “We have no idea what this really is. Can you please explain it to us?”

- Member 2: “We saw and heard about personalized learning at the MISL summit and it’s on the bit.ly site as well, but we are still unclear.”
- Member 3: “Is this another thing we have to do? Because we get initiatives handed to us all the time by central office.”
- Member 4: “How does this help our hard to reach students (e.g., our students of color and disabled students?)”
- Member 5: “Where do you suggest we start? Because we have not come up with a plan or even a project yet.”

After addressing each of the questions, it was clear I needed to do two things in the immediate future: 1) help this team and other teams devise a way to navigate the complex definition of personalized learning and 2) try to formulate proof points throughout the pilots that addressed team concerns on equity of opportunity and achievement. I previously noted that I came to my residency wanting to improve my coaching skills and working closely with eight teams would enable me to potentially meet that goal.

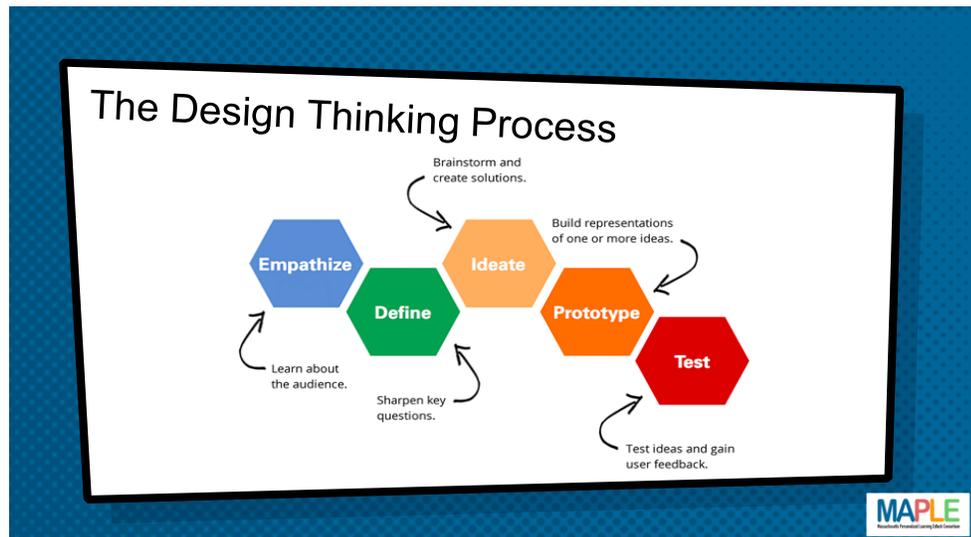
Interestingly, the MISL program director was having similar experiences with the nine teams she was coaching. One suggestion we offered to teams was for members to attend a MAPLE learning tour. The learning tours are opportunities for campus teams to see personalized learning strategies modeled in other schools. This was not a popular option because: 1) the MAPLE learning tours were in suburban schools whose contexts and student demographics were very different than the urban schools, 2) making provisions to support time out of the building for professional development was a challenge and 3) travel times to get to and from the learning tour sites were significant. Understanding these concerns, we began to spend time developing a strategy to support

team needs. One strategy brought all seventeen teams together for a daylong design-centered workshop in November 2019 at Clark College in Worcester, Massachusetts.

Our goal was multi-fold; we wanted teams to:

1. Learn from one other and strengthen our network of innovative school leaders,
2. Unpack individual social identities and how they influenced the work in personalized learning to increase educational equity,
3. Engage in a human-centered design process to build a strategy that would aid in achieving a personalized learning pilot, and
4. Experience personalized learning first hand.

We elected to introduce the following design-thinking process:



Through this process, we hoped that teams would create a strategy that would enable them to meet at least one challenge related to the implementation of their pilot programs and also have an opportunity to test their prototype with another group. The teams had the support of “visiting” coaches who helped guide them as they moved through each step of the process. According to the feedback from our end-of-day survey, each of the

seventeen teams left the fall program encouraged that their pilots could begin to make the changes they wanted to see in their schools.

Implementation Period (January 2019 – March 2019)

In this next period, the MAPLE team was working each day and week intensively to plan events and devise methods that could be adapted to ensure our member districts and schools had the tools needed to transition to personalized learning strategies.

As of March 2019, we were still working on the first bright spot profile. We had asked the district what evidence they had which supported the yields of personalized learning. We were also interested in how the district's strategies addressed issues of equity of opportunity and achievement. As we made revisions to multiple drafts, we included questions about personalized learning yields and correlations to equity of opportunity and achievement. The district responses were often hazy and our questions remained unanswered. My residency supervisor had a professional relationship with the district superintendent of the first bright spot profile and leveraged that connection to try to get the data we needed to complete this profile; she sent the following correspondence to the superintendent:

(Superintendent Name):

“Attached is a V1 of the formatted APS Bright Spot. I have a few questions and requests:(The list goes from easier to harder).

- Your narrative edits about keeping or not keeping the Exhibits (A, B, C, D) were not clear to me. You deleted some of them at the end but not from the TOC or from within the text. So, for now they are still included. I do think they are helpful as visuals but if they are included

in the main part of the text, it makes the report rather long.

- We only have low-rez photos of (district name) students to include, and we would very much like high-rez photos. The photos we currently have are from an iPhone. Any chance there are professional photos on hand that you can easily share with us?

- In general, for all districts, we are a bit stuck in getting more meaningful information on the "Evidence that PL is Working" for determining progress on PL initiatives. We've got one tiny section about this on (District Name) page 8. I'm not thrilled with this section, but think it's ok for this current version of this Bright Spot. I want to work on this more. I would very much like to talk with you about how to dig deeper and get better "measures that matter" information from all MAPLE districts.

So, please let me know your quick thinking on all 3.

I totally appreciate all the energy you are giving to this. It's our first bright spot profile and so this is a great foundation to design the next profiles. We'll also be able to refine (District Name), as it should be a living document."

In the week that followed, my residency supervisor and I had a telephone meeting with the District Superintendent. Two weeks later, I decided to follow up with the Superintendent via email; his response is included below:

"Hi (Superintendent Name):

Happy Thursday! Thanks again for taking the time to review and add to the latest version of the (District Name) Bright Spot profile. Would it be possible to receive your comments/recommendations by next week? We would like to finalize the profile in early April, if possible. Please do not hesitate to reach out if you need anything additional from the MAPLE team.

André"

"Andre,

That shouldn't be a problem. It was next on my list!

(Superintendent Name)”

I sent this email as I wanted to keep this effort on the Superintendent’s radar. From a strategic standpoint, I learned from prior experiences that “out-of-sight” was often “out-of-mind.” If I could help get the Superintendent refocused on this project, we could complete what would be our first bright spot profile. In the follow-up telephone conversation that ensued, my supervisor and I suggested several measures to the Superintendent that could be used to gauge the impacts of personalized learning (Appendix 6). We also recommended the district consider including an equity narrative, even though the district serves a predominantly white upper middle class student population. My residency supervisor and I pushed the district to obtain evidence of the impacts of personalized learning and its correlation to equitable outcomes. I note in the RKA, evidence about personalized learning is limited across the education sector; hence, this was an opportunity for MAPLE to make an essential contribution to, and be a leader of personalized learning in the sector.

While we were still attempting to complete this first bright spot profile, I started work on the second bright spot, realizing my tenure with MAPLE was limited. If the second bright spot was as time-intensive as the first, it was not likely it would get completed by the end of my residency. The same consultant with whom I worked on the first effort, also supported efforts on the second bright spot. My residency supervisor thought it would be helpful if I became more involved with the research on the front end and I agreed. To that end, the consultant and I visited the district to conduct the data collection and a series of interviews with the district office staff. Before this meeting, I had explained to our consultant that we wanted to identify metrics and corollaries

between personalized learning and issues of equity and opportunity. Our consultant noted that she was uncomfortable bringing those issues up, so I agreed to handle them. As we were visiting schools and classrooms with central office staff, I asked the Director of Digital Learning how the district thought personalized learning addressed issues of equity; she noted:

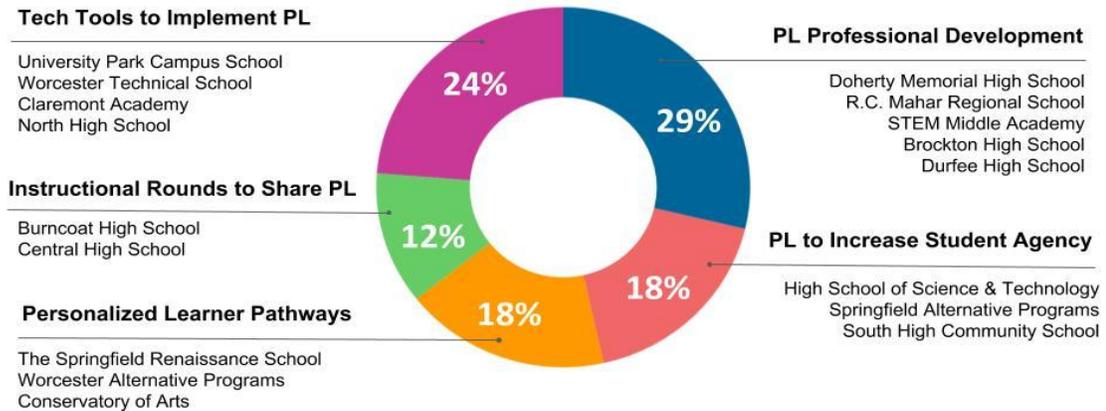
“(District Name) does service students with differing needs, so we try to implement personalized learning strategies to meet the needs of our different student populations. We recognize a key part of that though, is doing more with training our staff and taking it a bit further, even hiring more diverse staff to mirror our student demographics.”

I also asked how the district determined whether personalized learning strategies in the district were successful or not. The Director of Digital Learning and one of the Assistant Superintendents indicated the district had solicited feedback from staff and students via surveys regarding the district’s personalized learning strategies. The frequency of survey distribution, collection and data analysis was not clarified nor was I able to view the responses or any data gathered from the surveys. Despite asking to view the survey results, the district has not yet offered data to substantiate the success/es of personalized learning.

While I anticipated the second bright spot profile would take less time to draft, I wanted to try to complete it by the end of my residency assignment. Simultaneously, in this period, I began drafting the third bright spot profile. While this too would not likely be complete by the end of my residency, I would develop it to the degree I was able.

On the MISL front, I continued to meet with each of my eight teams on their pilot projects; the pilots for all seventeen MISL teams are reflected on the next page:

MISL Personalized Learning Pilots



All of my teams were progressing with their pilots, except one team, who had run into a roadblock. The school principal had elected not to support the team’s efforts to offer professional development to the school staff on personalized learning strategies. The principal’s rationale was that teachers had enough on their plates to get accomplished in this school year and she did not want to add additional tasks. Consequently, the team became unmotivated and shared the following thoughts with me during one of our coaching sessions:

- Member 1: “I thought we were really moving in a proactive direction.”
- Member 2: “André, this is the kind of sh** that always happens here. The staff want to do something to make things better and never get the kind of support needed to make things happen, be it for kids or adults.”
- Member 3: “I’m so frustrated with this and it’s not you; you have been great. It’s the situation.”

I calmed the team and by the end of our session, recommended they adjust their pilot. I further offered two suggestions they might consider for presenting their modified pilot to

the principal. One suggestion was asking the principal about the win/s (in the school) he/she would like to present to the central office by the end of the school year. If the team did not spend time understanding this information, it was likely that the pilot program would have no connection to the needs the principal was seeing; hence, the project may have been viewed by the principal as irrelevant.

The second suggestion was an advocacy approach, where the team would share their perspective/s and then ask the principal for alternative ways that could improve the pilot. After soliciting the principal's reactions, both good and bad, it was suggested to invite him/her to help the team create a more effective outcome for the pilot. Two weeks later, I received the following email from the team lead:

“André, I just wanted to share some good news. We followed your suggestions and the principal is on board with this new pilot and the team is really excited. Thank you.

I decided to spend more time with this team in the remaining weeks of the implementation period to get them to a point where they would have ample data to present at the end-of-year MISL program on May 8, 2019.

Closing Period (April 2019)

In the final month, we continued to work on the first bright spot profile. I also furthered work on the 2nd and 3rd bright spot profiles to bring them as close to completion as possible and began to bring closure to the other projects on which I was working. For MISL, I began planning (with the team) the final event for the year, the MISL showcase. This would be a daylong event that would reconvene all seventeen teams to present their

pilot initiatives to one another and also learn how to scale and sustain their work beyond the current school year.

Evidence to Date

Based on my findings in the Review of Knowledge for Action, data collected from interviews and conversations with staff and practitioners in the field, I have completed the following for MAPLE:

1. Developed an introductory video of Personalized Learning. This video complements the MAPLE definition of personalized learning. I will recommend that we show it again at the MISL closing program on May 8, 2019. It would be interesting to understand if the video gets a better reception than its first showing in July 2018 based on the exposure of each team to personalized learning strategies (included on page 39 of this capstone).
2. Co-wrote three bright spot profiles. The bright spot profiles are designed to: a) describe the prior and current work of a district in moving learning systems to a personalized framework that addresses issues of equity of opportunity and achievement in schools, b) better support all students in the Commonwealth of Massachusetts, c) serve as a guide for other districts in Massachusetts to understand personalized learning and identify how they might best shift learning systems to this approach and d) prepare students for college and career, and life.

3. Coached eight urban school teams, which implemented pilot programs on personalized learning with intended equity of opportunity and achievement outcomes.
4. Developed a district superintendent school committee toolkit. While this task is not included in this section overview, it supports superintendents in explaining the complexity of personalized learning to their school committee members. This resource was forwarded to all member Superintendents and includes a model presentation with (my) voiceover: <https://sites.google.com/learnlaunch.org/maple/superintendent-resources>
5. Partnered with Boston College to develop a proposal for research partnership. One recommendation I offered to MAPLE in the *Implications to Site* section was to partner with an academic or higher education institution for research services. I worked with one faculty member in the Boston College, Lynch School of Education, to develop a proposal for funding this work. In April 2019, the proposal was approved. MAPLE will have in-kind research services for one year (possibly more) that will advance understanding of how districts and schools can better promote personalized learning effectively (Appendix 7).
6. Developed a MISL School-Visit Plan. This template was designed to help the MISL teams identify and begin implementation of a personalized learning pilot.
7. Co-Developed the MISL Equity and Unconscious Bias Professional Development for Change Management Teams. This was a professional

development format that began at the launch of the MISL program in July 2018 and continued at the fall summit in November 2018. Some elements of this program will be included in the end-of-year showcase on May 8, 2019.

When I consider the work in which I was engaged, some of the tasks appear technical in nature. These are issues for which the definition and solutions are reasonably clear. Further, the responsibility for who should implement the solution/s is clear. Adaptive changes on the other hand, require changes in attitudes, behaviors and beliefs. It involves shared responsibility for staff and stakeholders for change.

All of my work tasks had adaptive work components. The work supported MAPLE in co-developing tools that are meaningful to the education field relating to personalized learning. For example, in co-developing the research proposal with Boston College, that effort is helping MAPLE to work better by becoming aligned with a research partner that can help facilitate a contribution to the limited extant research on personalized learning. In co-creating this proposal, the adaptive effort was negotiating something that was beneficial for our learners. In another task, I co-developed a professional development session on equity and unconscious bias. We did not outsource the work or bring in external consultants. In creating this content, the adaptive lens was attempting to utilize leadership competencies that MAPLE developed in July 2018 and endeavoring to help our district and school members understand the equity lens, which was complex.

Analysis

I elected to use the Kotter 8-Step Process for Leading Change because I speculated that it would be an effective guide for doing the work of leading change with my strategic projects. I understood that no framework would be a perfect fit; hence I identify (later in this section) the strengths and limitations of this model. My goal was to measure the effectiveness of this framework in addressing the challenges identified in the RKA. I discuss the analysis using the same four phases of work that are described earlier in this section:

<u>PHASE</u>	<u>TIME PERIOD</u>
Diagnostic	13 weeks
Initiation	13 weeks
Implementation	13 weeks
Closing	5 weeks

The Diagnostic Period (July 2018 – September 2018)

During this period, I considered the framework I would incorporate and started planning to use the *Demography Isn't Destiny* framework. By the conclusion of my diagnostic period, I had decided to employ the Kotter 8-step Process for Leading Change because: 1) MAPLE and its members were familiar with this framework and 2) considering my short time span, I would not have to invest time introducing and explaining an unfamiliar approach and obtaining buy-in.

I utilized the Kotter 8-step process with the first bright spot profile I co-drafted. I thought this would be useful as we were attempting to expand the understanding and demand for personalization in Massachusetts. I also used the Kotter 8-step process with one of my eight teams that experienced challenges in implementing a personalized

learning pilot with intended equity outcomes. Given the complex nature of both projects, I was interested in understanding the capability of the Kotter 8-step process in implementing strategic changes expeditiously and effectively.

The Initiation and Implementation Periods (October 2018 – March 2019)

Bright Spot Profile

The bright spot profile sought to draw support for a district's focus on personalized learning strategies. It required ample time and several hands to get it completed. The adaptive component for this effort was convincing people this was important to complete. The understanding was clear with the district superintendent, but not with the other members of the district team. Our goal was to highlight how a district transitioned from traditional methods to personalized learning strategies, which in turn, could serve as a roadmap for other superintendents and districts in Massachusetts who are considering shifting learning models to personalized learning. This is one way MAPLE can sustain its work with member districts, which helps to address the first guiding question in this capstone. The team that supported this effort from the district included: the Superintendent, the (former) Assistant Superintendent, the Director of Digital Learning, the Director of Strategic Innovation and the Director of Communications. The MAPLE team included: an external consultant, my residency supervisor and myself. We solicited input from the other MAPLE team members. I decided to set up an informal interview process to assess the impact of the Kotter 8-step process on this task. I asked members of the MAPLE team questions related to the Kotter 8-step process as we were completing the task.

When our external consultant passed a draft of the bright spot profile to me to continue writing, I reviewed, re-wrote and identified several questions the district could address to make the bright spot purposeful; inquiries included: 1) reasons that led the district to shift towards personalize learning; 2) the challenges associated with the shift towards personalized learning; 3) how teachers and students perceived personalized learning during implementation; 4) how the district assessed the effectiveness of personalized learning, once it was instituted; 5) how the personalized learning strategies connected to issues of equity of opportunity and achievement; and 6) what were the lessons learned from the shift to personalization.

After the first round of questions were addressed, I asked two district staff members about the urgency of the project (Kotter, Step 1). One responded, *“It was clear when I received the profile from our Superintendent, that it was to be completed with relative immediacy.”* The other replied, *“Because I was working on another major effort for the Superintendent at the time, the urgency level for me was getting the other project completed.”*

The featured district administration and staff, and my residency supervisor, were integral members of the guiding coalition group (Kotter, Step 2), as these were the persons who had the greatest knowledge and power to drive the work forward. In one case, the district staff member that was needed most to fill in the gaps, had little or no time to contribute to the work. It took several weeks of “chasing” this staff member, and responses to questions were only received during an in-person district visit for a learning tour event. It was clear the staff member who needed to be pursued, did not feel the

urgency for this effort, which made me consider how I may have coached this staff member towards a greater sense of urgency for this effort.

When two MAPLE team members were asked about the vision (Kotter, Step 3), both agreed the vision was clear to them, but acknowledged the purpose of the task was less clear. While we had talked about this task in MAPLE weekly meetings, we had not ensured the entire team understood why we were drafting the bright spot, aside from it being a grant-related requirement.

One MAPLE team member was prompted about communicating the vision to help move the work (Kotter, Step 4); she noted she did not feel like the person who was responsible for communicating the vision because this was a task she was given to complete and her role on this project was one of supporting and not leading. Another MAPLE team member was asked about enabling action by removing barriers (Kotter, Step 5); she replied, *“The barrier was having to rely on others to get the work completed; that is, the folks on the district side, who had the information, did not readily comply with requests, and the barrier was only removed when someone with more authority was informed.”* By this stage, I was beginning to have doubts that the Kotter 8-step process was working out as the right framework for this task.

Generating short-term wins (Kotter, Step 6) can keep the urgency level up and also keep the change moving forward (Kotter, 1996). When a working draft of the bright spot was developed, it was shared with the entire team. According to one district team member, *“Seeing the near-finished product gave me a sense of pride and I thought...Wow, our district is doing all of these great things for kids.”* A MAPLE team member noted, *“Seeing the draft allowed us to see everyone’s contributions and feel*

good about our collaborative efforts.” In sustaining acceleration (Kotter, Step 7), leaders must get people to continue the change effort and keep the urgency relevant (Kotter, 1996). Three team members (district and MAPLE) felt that pushing the district to provide evidence that personalization was working for students could help *“inform the district’s efforts going forward”* and assess how personalized learning correlated with equity of opportunity and achievement.

Team Coaching

One of my school teams (comprised of five members) had a high population of low-income students and the team devised a project to try to connect their pilot with equitable outcomes. The team believed two ways to accomplish this was through: 1) three personalized professional development sessions (two in the fall and one in the spring) and 2) three unconscious bias trainings (one in the fall and two in the spring). I set up a focus group structure to assess the impact of the Kotter 8-Step process on this task.

Kotter describes that without true urgency (Kotter, Step 1), change will not happen (Kotter, 1996). Overall the team agreed on the urgency for the pilot project, but acknowledged that the pilot had a different level of urgency for each of them. One team member explained:

“My feeling was that everyone agreed on the urgency of the project at the summer program, but the urgency level was clearly different for all of us. I think it is how we all prioritized it.”

Three other team members affirmed that a sense of urgency looked different for each of them. For one member, urgency was *“getting the pilot on everyone’s radar and implemented by an agreed upon date.”* For another member, it was, *“getting the support*

of the principal.” For a third member, it was seeing, “*how personalized learning was impacting the school’s “hard-to-reach” students,*” which included students whose first language is not English. The team realized that if they did not address the needs of this particular demographic, it was possible this group could experience a decline in statewide test performance and if that occurs, the school would likely be reclassified as needing *focused/targeted support* or *broad/comprehensive support*. Neither designation would be an acceptable classification to the district.

Kotter described the four main characteristics of a guiding coalition (Kotter, Step 2) as integral to the change management process; he cites authority, knowledge, credibility and leadership talent (1996). One team member explained, “*Each member of this change team is integral to the group,*” but felt like the pilot project would be further along if they had the support of the principal, who was thought to have the knowledge and power to drive the change the team was suggesting. Two of the other four team members agreed. Since a majority of the team shared this sentiment, I wondered how we would incorporate a sense of urgency to keep the pilot project moving forward.

The guiding coalition according to Kotter (1996) drives the vision. One team member felt the pilot did not have a clear vision from the start, but was better formed in the process. Another member noted that the guiding coalition had the experience and knowledge that was needed for the change, but not the leadership support to push the change to the entire school staff. The three remaining team members agreed with the latter point. My take-away of this was that it would be important to demonstrate for other places how important it is to have leadership support in the change management process.

Kotter asserts in every successful transformation effort, the guiding coalition develops the vision (1996). Communicating the vision (Kotter, Step 3) is an integral part of the change process (Kotter, 1996). According to all team members, the vision had not effectively been communicated to staff; one team member noted in particular:

“We were trying to communicate the vision to our principal first, so she could help us communicate it to the entire staff, but she views personalized learning as just another thing the school has to do, and according to her, we are up to our eyeballs in fulfilling district mandates.”

Kotter identifies Step 4 as enlisting the volunteer army of the change management effort. The team agreed they were the “volunteer army” group that would get the teachers and staff in the school to not only see the value of personalization and its connection to equity of opportunity and achievement, but also help others act upon the urgency of change.

The team further commented that while they were the volunteer army, their momentum was diminished by the principal, who was the barrier in the pilot project being successful and suggested the only way to remove the barrier (Kotter, Step 5) was to “*get the Superintendent involved.*” After several members of the team affirmed this sentiment aloud, each team member rescinded their desire to get the Superintendent involved fearing retribution by the principal. The team agreed that a short-term win (Kotter, Step 6) was getting buy-in from some of the other teachers (individually) around implementing a personalized learning pilot, but a bigger win would be getting buy-in from the principal. This was when I recommended they adjust the pilot. I further offered a couple of suggestions for presenting their adjusted pilot to the principal, which

Morgan, André S. – Ed.L.D. Capstone

according to the team lead was well received. Change (Kotter, Step 7) then became evident for this project.

Closing Period (April 2019)

Bright Spot Profile

The last step in the 8-Step process is instituting change. Members of the district team acknowledge the bright spot profile helped them to realize they should have evidence to show personalized learning is working for students. Further, the district understands it will be helpful to identify measures that connect personalized learning to equity of opportunity and achievement. Going forward, the district has agreed to identify specific metrics they will implement in the 2019-20 school year to determine the impacts of personalized learning on students and share such metrics with MAPLE.

Team Coaching

All five team members expressed the pilot had not yet reached Step 8 in the process, but were hopeful they would reach the final step by the date of the MISL showcase (May 8, 2019).

Reflection on the Kotter 8-Step Process

The successful implementation of change is a difficult task in any organization. Formal structures can be useful tools in helping to navigate small and/or large-scale changes, so long as there exists a commitment by the organization's leaders to make such change/s.

I found the Kotter 8-step framework to be helpful for staff in seeing how an organizational change can impact desired outcomes (if they are clearly communicated). I

found the structure less helpful in facilitating the intended change/s. Based on my experiences, as cited above, a few of the limitations of the Kotter 8-step model included:

1. Teams experienced complacency and apprehension during the process,
2. Teams failed to create an impactful guiding coalition, and
3. Teams allowed obstacles to block the vision.

I previously mentioned that no framework is perfect, but I wonder if I may have realized better outcomes if I had either used an alternative framework or included another framework in parallel with the Kotter 8-step model. For example, I may have made a decision to implement the *Demography Isn't Destiny* framework with one project, while maintaining the Kotter 8-step process with another. Afterwards, I could have compared the two models and identified the conditions for which both frames would contribute to an organization's intended results.

Summary

My guiding questions in this capstone are: 1) How can MAPLE and MISL scale and sustain its work? 2) In what ways can personalized learning impact equitable outcomes? My work on my strategic projects allowed me to better understand that scaling and sustainability for any program can occur when there is clarity and vision. Hence, I was able to offer a clear answer and recommendations for question # 1 in the *Implications to Site* section.

Question # 2 was a harder to address because equity is not a traditional focus of personalized learning, although logic would support the premise that if learning is personalized for “all” students, the “all” would include: students of color, students with disabilities, students learning English and students from low income families. My

Morgan, André S. – Ed.L.D. Capstone

projects did not connect personalized learning strategies with equitable outcomes. Hence, I am not able to offer a clear answer to question # 2; however, I do offer a recommendation in the *Implications to Site* section that may address this question and also allow MAPLE to make equity of opportunity and achievement more actionable.

V. Implications for Self

My Leadership Goals

I came to my residency experience with two goals in mind. I wanted to gain experiences that would enable me to be a better strategic decision-maker as a leader and a better coach to staff. While my skill-sets in these areas were not deficient prior to my tenure in the Ed.L.D. program, I did feel added exposure in these spheres would better position me as a system-level leader when I re-enter the U.S. education sector. Most of the learning that met my personal objectives came through the coaching tasks. While I was able to gain a few added insights in these two areas, I also gleaned an unintended perspective on the importance of reflecting on one's work.

Strategic Decision-Making and Risk Assessment

I was able to strengthen my expertise in strategic decision-making through the 10-month MISL team coaching sessions. During that time, I coached eight high-school teams in developing and implementing pilot programs using personalized learning strategies and supporting the teams in trying to realize a connection between personalized learning and equity of opportunity and achievement outcomes.

As a developing system-level leader, I recognize my decisions should be as strategic as possible because each choice can either move an organization toward a vision and a set of practices that reinforce my and/or an organization's core ideologies and values, or ground the organization in inefficiency, such that it moves with little impact. While my intention would never be to make decisions that harm an organization and its members (significantly or minimally), I understand that each decision may not produce the change I want to see happen. According to Vertzberger (1998), risks and high-stakes

decisions are an integral part of leading complex organizations, for which districts and schools are a part. My residency supervisor was instrumental in preparing me to make future risk-oriented decisions. She taught me that effective decision making requires a certain level of comfort with discomfort; that is, one generally has three options when faced with important decisions: 1) play it safe and let others make the decision, 2) spend unnecessary time agonizing over each available option or 3) accept that there is a level of risk and make a decision. I realized that my uneasiness around risk-oriented decisions was in not wanting to make a faulty decision. My residency supervisor pushed me on my discomfort and reaffirmed I could only make the best decision I could with the information I have available at the time of the decision. Even in making a bad decision, I have to be confident I can handle whatever outcome emerges.

For example, with one team I coached, I encountered a disruptive team member. I considered avoiding the team member since my tenure with the team was short-term. I thought better of that option and decided to address the team member, knowing the outcome could create more tension and limit the team's work with their pilot project. I scheduled a meeting with this member separate from the team meetings. In the one-on-one meeting, I started the discussion with two positive statements and then eased into the behavioral changes I wanted to see from this member. I made a decision to coach the member to change instead of criticizing them into stopping their behavior. Hence, it was an adaptive effort. I was not afraid to make this decision to deal with this issue because I considered the team and the number of staff and students the decision would positively impact long-term. Perhaps the takeaway for me is that being fearful and risk-avoidant in

decision-making, limits the leader in his/her abilities to drive change. Further, if I had avoided making a decision that choice would have been making a decision.

Coaching

Through coaching eight MISL school teams this year, I learned to shift my coaching style from directing and telling (which was a norm for me prior to the Ed.L.D. program). While I believe there is a time and place for telling and directing staff, I understand these functions are best received when they are balanced with coaching that also guides and develops. The equilibrium of both components can be a more impactful way to help staff to improve their performance so the organization may realize the highest yields (Theeboom, Beersma & Van Vianen, 2013).

During one of my earlier coaching sessions, one of the team members noted that my coaching style with the team (while effective) would be more successful if I moved away from directing and telling people and towards promoting a culture of learning. I was surprised at this feedback because I did not know from what lens it was being offered. I further did not understand how I could promote a culture of learning in that environment, considering I was not on that campus daily working with that team. The more I thought about it, I realized I was working with this team in bi-monthly intervals, and perhaps that was ample time to impact the team. I surmised changing the culture with a few people at a time, can ultimately impact the entire organization.

I am starting to think about coaching as a tool that offers both knowledge and opportunity to people in order that they may increase their personal and professional effectiveness. Hence, coaching should not just be an autonomous function, but can serve as a mechanism to support staff to meet personal and organizational goals (Theeboom.

Beersma & Van Vianen, 2013). I am thinking about Kiernan’s question to me, “What do you know the least about today? And, where can you learn it to help guys who look like us?” In response, I suppose I had more to learn about coaching people and the long-term impacts of coaching on teaching and learning. If I modify my perspective and practice on coaching, perhaps that may aid leaders and practitioners in developing an enhanced mindset on serving all students, particularly those who look like Kiernan and me.

Taking Time for Reflection

I remember a discussion on this topic in one of my first year Ed.L.D. courses, *Practicing Leadership Inside Out*. It did not mean much to me at the time of occurrence, but the conversation resurfaced in memory after a few weeks of being in my residency assignment. My residency supervisor had encouraged me to take a work-from-home day and spend a portion of that day reflecting on the many moving pieces associated with MAPLE; she called it “think space.” In reflecting on the reflection, the first time I utilized “think space,” I did not use the time most productively; in fact, I used the time to get caught up on residency work and on other activities for which I was involved. My rationale was that I was spending so much of my time in meetings during the business hours of each day that it made it necessary to get caught up during the “think space” time. That was an excuse, and as a developing system-level leader, I know better than to rely on weak explanations.

In the following weeks, when I did utilize “think space” time constructively, I found I was able to: 1) improve my understanding of different contexts related to my strategic project, 2) deepen my understanding of the problems involved with my work, which enabled me to devise and communicate better solutions and 3) make sense of

Morgan, André S. – Ed.L.D. Capstone

information with which I was grappling to understand. I leave residency understanding that “think spaces” can allow reflection on both successes and failures. It is not about focusing on specific outcomes, but rather, understanding what actions work well in specific situations and examining potential transferences to other scenarios.

VI. Implications for Site

Personalized Learning, Scale and Sustainability

If MAPLE is to effectively scale and sustain personalized learning, we must:

Consider how to help partners navigate a complex definition of personalized learning, in order they may better identify specific starting points for any level of implementation/s (small or large-scale). Additionally, helping schools to navigate personalized learning strategies will clarify our value-add to not only districts and schools, but also to the wider U.S. education sector. We should not merely advise campuses to consider several elements and expect they will produce personalized learning strategies that can be scaled and sustained. If districts and schools could accomplish this with ease, there would be little need for MAPLE's interventions. We may consider establishing a structure that provides models for school-level implementations. One way we might accomplish this is to develop blended on-line and in-person courses for our members. This would allow us to include "how-to" videos, readings and our bright spot profiles to help build our community of districts who desire to move their student learning models to personalized strategies.

Identify, develop and use metrics to support the benefits of personalized learning, which will serve two purposes: a) offer a contribution to the education field's limited research on the outcomes of personalized learning; hence propelling MAPLE as a leader in this work and b) aid MAPLE in securing additional funding as many funding organizations want to know how programs are measuring success or failure. One further suggestion in this area is for MAPLE to hire a formal researcher to support research for its initiatives. The advantage of this option is that MAPLE gets a trained professional

researcher. The disadvantage is that it will require resources that MAPLE does not currently have in its budget. A second option in this area is for MAPLE to partner with an academic or higher education organization to provide research services. The advantage of this option is receipt of in-kind services by the partner; the disadvantage is that graduate students, who are in training as researchers, may conduct the research. As of April 2019, MAPLE will have in-kind research services for one year (possibly more) that will advance understanding of how districts and schools can better promote personalized learning effectively (Appendix 7).

Additional staff capacity is needed to support the goals of MAPLE. Scaling and sustainability for MAPLE will be unattainable with a staff of five employees. The current team is planning for expansion and I speculate how much consideration is given to how programmatic growth will impact the current staff load. If staff is given extra work without added incentives and pay, employee performance, engagement and job satisfaction may be negatively impacted in the future.

Personalized Learning and Equity of Opportunity and Achievement

Our aspiration is that personalized learning leads to equitable teaching practices. We can do a better job in making a clear connection between personalized learning and equity of opportunity and achievement.

One recommendation is to go deeper with districts in the area of school leadership; that is, working specifically with campus principals and assistant principals to create culturally responsive learning environments. Culturally responsive schools value diversity and build on collaborative relationships between staff, students, parents and families, and communities to support student learning. If equity is to be an actionable

outcome for MAPLE initiatives, it must be promoted to members as an intentional part of the district and school culture. MAPLE may consider developing and making available, a framework that can be used by member districts and schools to reflect on practices and identify opportunities for improved action to build on existing knowledge and skills. One such model is included below and adapted from the Western Australia Department of Education, Aboriginal Cultural Standards Framework (2015):



Each of the standards could have indicators to guide leaders as they work with students, their parents and families, and communities. The strategies could enable leaders to reflect on individual and whole district and school progress, and also aid in developing further approaches to move a district and school towards becoming culturally responsive (WADOE, 2015). Together, the standards and strategies may help leaders to plan for and initiate equity improvement in their districts and schools. Consider the following example, using “leadership” as a standard and supporting students of color as an equitable outcome:

<u>Standard</u>	<u>Descriptor</u>	<u>Indicator</u>	<u>Strategy</u>
Leadership	District and school leaders support personalization in educating students of color.	District and school leaders encourage personalized approaches to engage students of color.	<p>1) District and school leaders discuss with staff ideas and approaches to improve outcomes with students of color.</p> <p>2) District and school leaders support opportunities for staff to develop personalized approaches for students of color.</p> <p>3) District and school leaders and staff, in partnership with community members, develop personalized approaches to improve learning outcomes for students of color.</p> <p>4) District and school leaders and staff engage students of color in school-wide approaches.</p> <p>5) District and school leaders and staff report to the school committee/board on the achievements and progress of students of color and engage local and community members about the value and success of specific initiatives.</p>

Each of the standards could have multiple descriptors and indicators, as well as multiple strategies to guide each descriptor and indicator (WADOE, 2015). The sentiments

underlying this framework could apply to all schools, including those with low enrollments of students of color, students with disabilities, students learning English and students from low-income families. To ensure district and campus success, MAPLE may consider offering technical support where requested.

Offering support in this way would require greater MAPLE staff capacity. This is necessary in order to develop this framework which can directly connect MAPLE’s mission and address equity of opportunity and achievement.

SWOT Analysis

The following SWOT analysis is intended to capture a sample of key “Strengths, Weaknesses, Opportunities and Threats” as it pertains to MAPLE’s trajectory.

SWOT Analysis

	<u>Helpful</u> to achieving the project’s aim	<u>Harmful</u> to achieving the project’s aim
Internal (Project)	Strengths <ul style="list-style-type: none">• What do you do well?• What do others see as your strengths?• What resources can you draw on?	Weaknesses <ul style="list-style-type: none">• What can you improve?• Where do you have fewer resources than others?• What should you avoid?• What are others likely to see as weaknesses?• What factors lose you support?

	<u>Helpful</u> to achieving the project’s aim	<u>Harmful</u> to achieving the project’s aim
	<ul style="list-style-type: none"> • Perceived positively by Massachusetts public school districts and campuses. • Existing relationships and channels of communication with districts and campuses. • Desire of district and school teams to change the landscape. • Relationships with urban schools. • Channels of communication with professional organizations (e.g., MASS and MASSCUE). 	<ul style="list-style-type: none"> • Lack of buy-in with personalized learning by district and school leaders. • Limited understanding by district and campus leaders to implement personalized learning. • Connecting the dots on how personalized learning helps to close equity gaps. • Technology not yielding anticipated outcomes and being cost prohibitive for many districts and schools. <p>My strategic projects are contributions to improve the first two limitations.</p>
External (to the Project)	<p>Opportunities</p> <ul style="list-style-type: none"> • What good opportunities are open to you? • What trends could you take advantage of? • How can you turn your strengths into opportunities? 	<p>Threats</p> <ul style="list-style-type: none"> • What trends could harm you? • What threats do your weaknesses expose you to? • Are the required specifications for your services changing?
	<ul style="list-style-type: none"> • Broader initiatives using higher education partners. • Demand from teachers and students. • Leadership support for innovations • Openness to innovation. • Develop strong external partners. <ol style="list-style-type: none"> 1) Boston College, Lynch School of Education, 2) Digital Promise, 3) Highlander Institute, 4) The Learning Accelerator, 5) Next Generation Learning Challenges, 6) LEAP Innovations 	<ul style="list-style-type: none"> • Funding cuts/changes beyond MAPLE’s control. • Lack of staff capacity. • Reliance on two sources of core funding.

VI. Implications for Sector

Educators in the PreK-12 sector may consider the following conclusions as it relates to scaling and sustaining personalized learning, and striving towards equity of opportunity and achievement:

1. If personalized learning remains a complex definition in the education sector, these strategies could be another in a long series of educational reforms that fail to lead to meaningful improvements on the problems faced by the U.S. education system that were brought to light in, “A Nation At Risk (1982) and compounded in “No Child Left Behind (2001).”

2. Districts, schools and supporting organizations must work to develop metrics of success to support personalized learning outcomes. Until the U.S. education sector can develop a research base demonstrating positive outcomes for all students that exceed traditional instructional approaches, there will be deficit-based mindsets across the education sector about personalized learning and its correlation to successful outcomes. Relatedly, policy and education leaders may need to rethink what assessment and accountability measures look like, as an assessment of student-centered learning resulting from personalized learning strategies, may not be captured on a high-stakes examination.

3. If school districts adopt personalized learning strategies, they will need to create the conditions for successful personalized learning growth and implementation. One consideration is to provide campus principals with the autonomy to develop personalized learning strategies for students in their schools.

4. Districts and schools should not rely solely on grant resources to fund personalized learning strategies long-term. While grant funds can support the planning

and implementation of personalized learning strategies, they are often short-term. If personalized learning is going to be a long-term instructional strategy in classrooms, district and campus leaders will need to decide how to fund personalization efforts (Rickabaugh, 2016).

5. Classroom teachers will need access to the latest technologies as they are introduced in society. While the U.S. thrives in a digital age, the education sector has not yet identified the most efficient ways to bring digital technologies to school classrooms. As technologies become available, teachers and administrators will need opportunities to learn about them in order to make decisions about what will work best with students in their schools (Horn, Staker & Christensen, 2014).

VIII. Conclusion

I received a text from Kiernan inviting me to dinner with his family; of course, I accepted the invitation. When I arrived for dinner, there was a magnificent spread of baked chicken, collard greens, black-eyed peas, cabbage, rice, cornbread and a succulent apple pie. Kiernan nudged me and said, “Don’t think this is just for you; this is everyday eatin’ for us.” I smile and reply, “Right.”

As we are eating, Kiernan starts the conversation by saying, “So, how was it? Did you learn a lot at...what’s the name of that company again? I reply, “LearnLaunch Institute.” “Yeah,” he says, “LearnLaunch! What did you learn?” I thought for a moment and then replied, “I’m still learning, but here are my initial thoughts...” Between bites of food, I explain to Kiernan, the work I have been engaged in over the months and try to connect my learning to his earlier inquiry of what would “help him” and students who look like him and me. I share the following key learnings with Kiernan:

Key Learnings

1. Personalized learning, while complex in meaning, understanding and implementation, could help students and particularly those of color, to have better learning experiences in high school, however, that is dependent upon practitioners being able to understand the core ideas of personalization and dealing with any overt or implicit biases regarding students with difference. For example, as a teacher, if I do not believe that students who have disabilities, deserve the same experiences as students who are not disabled, I may limit certain experiences in my classroom and school, unintentionally. Educators engaged in this work have to

intentionally use an equity lens to give driving purpose to personalizing learning for students (Blankstein, Noguera & Kelly, 2016).

2. To help organizations like MAPLE to achieve their missions of closing achievement gaps and preparing all students for a vibrant future, system-level leaders have to be thoughtful in deciding how they will lead change/s in their organizations. For example, I elected to use the Kotter 8-step framework to operationalize my strategic project tasks. While I identified ways it was helpful for project completion, I wonder if other frameworks (e.g., Demography Isn't Destiny, Lewin's Change Management Model or the McKinsey 7-S Model) would have helped facilitate a greater level of success for the change I was looking to make. Further, I wonder if the Kotter 8-Step model is the most applicable framework to use to impact outcomes for students with difference.

3. Related to learning # 2, I did not find that my specific projects led to urgency in the district and in the school where my tasks were situated. Perhaps my sense of urgency was not translated to the teams in a way that focused on the benefits towards students. Creating and advocating urgency with clarity, can make a difference between closing and continually widening achievement gaps.

Looking to the future , I would like to continue my work with personalized learning in future roles. One contribution I can likely make is adding to the extant research by facilitating (and publishing) research on the impacts of personalized learning

strategies, particularly, with students: of color, with disability, who are learning English and are from low-income families. Perhaps a second contribution I may offer is helping the U.S. education sector to realize a less complex definition of personalized learning by contributing to a clear and more informed meaning; that is, defining what personalized learning means in the context of teaching and learning and identifying how it looks in practice. I further consider my skill-sets and background could help construct correlations between personalized learning strategies and issues of equity of opportunity and achievement.

As I move towards completion of the Doctor of Education Leadership program, I want to end my capstone in the way of a protocol for which I was introduced by Dr. Mary Grassa O'Neill, current Director of the Harvard Graduate School of Education, Master's Program in School Leadership and former Director of the graduate school's Programs in Programs in Professional Education. The protocol is titled, "*I used to think, but now I think,*" which for me, drives the spirit of reflection of practice. When I joined LearnLaunch 10 months ago:

I used to think:

- Reform measures in the U.S. education sector, and personalized learning strategies were another in a long series of educational reforms that would fail to lead to meaningful improvements with students of difference.

Now, I think:

- Personalized learning strategies represent the kind of systemic form that closes achievement gaps among varied student demographics. I also think personalized learning can address the critical problems plaguing the U.S.

education sector and help ensure that each student, and in particular, those who look like Kiernan and me, have the opportunities to succeed tomorrow in a stronger America.

So, about Kiernan, whom I have mentioned several times in this capstone.... I am excited to share he is on his way, in a few months, to my alma mater, the University of Virginia, to begin his undergraduate studies.

References

- Anderson, M. (2016). *Learning to choose, choosing to learn: the key to student motivation and achievement*. Alexandria, VA: ASCD.
- Balonen-Rosen (2016). Massachusetts education again ranks no. 1 nationally. Retrieved from: <http://learninglab.legacy.wbur.org/2016/01/07/massachusetts-education-again-ranks-no-1-nationally/>
- Bell, C. (2015). The hidden side of zero tolerance policies: the african-american perspective. *Sociology Compass*, 9(1), 14-22.
- Blankstein, A. M., Noguera, P., & Kelly, L. (Eds.) (2016). *Excellence through equity: five principles of courageous leadership to guide achievement for every student*. Alexandria, VA: ASCD.
- Bloom, B.S. (1984). The 2 sigma problem: the search for methods of group instruction as effective as one-to-one tutoring. *Educational Researcher*, 13(6), pp. 4-16.
- Cavanagh, S. (2014). What is personalized learning? educators seek clarity. Retrieved from: <https://www.edweek.org/ew/articles/2014/10/22/09pl-overview.h34.html>
- Chuong, C. & Mead, S. (2014). A policy playbook for personalized learning: ideas for state and local policymakers. Retrieved from: <https://bellwethereducation.org/publication/policy-playbook-personalized-learning-ideas-state-and-local-policymakers>
- Cookson, P.W. Jr. (2013). *Class rules: exposing inequity in american high schools*. New York: Teachers College Press.
- Domenech, D., Sherman, M., & Brown, J. L. (2016). *Personalizing 21st century education: a framework for student success*. San Francisco: Jossey-Bass.
- Dougherty, N. (2018 October 24). How can personalized learning support educational equity. Retrieved from: <https://www.edelements.com/blog/author/noah-dougherty>.
- Edgington, N. (2017). What is non-profit sustainability? Retrieved from: <https://www.socialvelocity.net/2017/03/09/what-is-nonprofit-sustainability/>.
- EquityXdesign (2016). Racism and inequity are products of design. They can be redesigned. Retrieved from: <https://medium.com/equity-design/racism-and-inequity-are-products-of-design-they-can-be-redesigned-12188363cc6a>
- ESSA (2015). Every Student Succeeds Act of 2015, Pub. L. No. 114-95 § 114 Stat. 1177 (2015-2016).

Morgan, André S. – Ed.L.D. Capstone

Fisher, J. (2014). Three insights on “self-directed” learning and how to aim for equity. Retrieved from: <https://www.competencyworks.org/analysis/three-insights-on-self-directed-learning-and-how-to-aim-for-equity/>

Gladwell, M. (2008). *Outliers*. New York: Little, Brown and Company

Gorski, P. (2018). *Reaching and teaching students in poverty: strategies for erasing the opportunity gap* (2nd edition). New York: Teachers College Press.

Grantmakers for Effective Organizations (2011). *What do we mean by scale?* Washington, DC: Grantmakers for Effective Organizations.

Great Schools Partnership (2015). The glossary of education reform: personalized learning. May 14, 2015, Retrieved from: <https://www.edglossary.org/personalized-learning/>

Green, P. (2018). Scaling up personalized learning. Retrieved from: <https://www.forbes.com/sites/petergreene/2018/09/10/scaling-up-personalized-education/#70b487e9735e>

Gross, B., Tuchman, S., & Patrick, S. (2018). A national landscape scan of personalized learning in k-12 education in the united states. Retrieved from: https://www.inacol.org/wpcontent/uploads/2018/06/iNACOL_ANationalLandscapeScanOfPersonalizedLearning.pdf

Herold, B. (2017). The case(s) against personalized learning. *Education Week*, 37 (12), pages 4-5.

Horn, M., Staker, H. & Christensen, C. (2014). *Blended: using disruptive innovation to improve schools*. San Francisco: Jossey Bass

Howard, G.R. (2016). *We can't teach what we don't know: white teachers, multi-racial schools* (3rd edition). New York: Teachers College Press.

Hrebiniak, L.B. (2013). *Making strategy work: leading effective execution and change* (2nd edition). Saddle River: FT Press.

Jackson, Y. (2011). *Pedagogy of confidence*. New York: Teachers College Press.

Jackson, Y. (2018). Transformational pedagogy: cashing the promissory note of equity for all students – especially those who are marginalized. Retrieved from: <https://capacitybuildingnetwork.org/article8/>

- Jobs for the Future and Council of Chief State School Officers (2018). Leadership competencies for learner-centered personalized education. December 14, 2018. Retrieved from: <https://ccsso.org/resource-library/leadership-competencies-learner-centered-personalized-education-0>
- Jones, L.E. & Casey, M.C. (2015). Personalized learning: policy and practice recommendations for meeting the needs of students with disabilities. Retrieved from: <https://www.nclد.org/wp-content/uploads/2016/04/Personalized-Learning.WebReady.pdf>
- Khalid, A. (2013). Mass. students among top-performing in global exam. Retrieved from: <https://www.wbur.org/news/2013/12/03/massachusetts-pisa-test-results>
- KnowledgeWorks (2015). A state policy framework for scaling personalized learning. Retrieved from: <https://knowledgeworks.org/wp-content/uploads/2018/01/state-policy-framework-personalized-learning.pdf>
- Kotter, J. P. (1996). *Leading change*. Boston, MA: Harvard Business School Press
- Larmer, J., Mergendoller, J., & Boss, S. (2015). *Setting the standard for project-based learning*. Alexandria, VA: ASCD & Novato, CA: Buck Institute of Education.
- LearnLaunch Institute (2019). MAPLE- about us. Retrieved from: <http://learnlaunch.org/maple-about-us/>
- Lentino, A. (2017). 5 creative strategies to facilitate student-driven learning. Retrieved from: <http://www.easybib.com/guides/student-driven-learning/>
- Massachusetts Department of Elementary and Secondary Education (2013). Cohort 2012 four-year graduation rates – state results. Retrieved from: <http://www.doe.mass.edu/infoservices/reports/gradrates/2012-4yr.pdf>
- Massachusetts Education Equity Partnership (2018). #1 for some: opportunity and achievement in massachusetts. Retrieved from: <https://number1forsome.org/#section-0>
- McKinsey and Company (2016). How to scale personalized learning. Retrieved from: <https://www.mckinsey.com/~media/McKinsey/Industries/Social%20Sector/Our%20Insights/How%20to%20scale%20personalized%20learning/How-to-scale-personalized-learning.ashx>
- National Commission on Excellence in Education (1983). *A nation at risk: the imperative for education reform*. Washington, DC:U.S. Government and Printing Office.

National Equity Project (2018). Why equity? Retrieved from:

<http://nationalequityproject.org/about/equity>

NCLB (2002). No Child Left Behind Act of 2001. Pub. L. No, 107-110, 20 U.S.C. § 6319.

Pane, J.F., Steiner, E.D., Baird, M.D. & Hamilton, L.S. (2017). Continued progress: promising evidence on personalized learning. Retrieved from:

https://www.rand.org/pubs/research_reports/RR1365.html

Patrick, S., Worthen, M., Frost, D., & Gentz, S. (2016). Meeting the every student succeeds act promise: state policy to support personalized learning. Retrieved from: <https://www.inacol.org/resource/meeting-the-every-student-succeeds-acts-promise-state-policy-to-support-personalized-learning/>

Philanthropy News Digest (2018 May 3). Chan Zuckerberg initiative gives \$14 million for personalized learning. Retrieved from:

<https://philanthropynewsdigest.org/news/chan-zuckerberg-initiative-gives-14-million-for-personalized-learning>.

Rickabaugh, J. (2016). *Tapping the power of personalized learning: A roadmap for school leaders*. Alexandria, VA: ASCD.

Rubin, S.C. & Sanford, C. (2018). *Pathways to personalization: a framework for school change*. Cambridge: Harvard Educational Press.

Smith, R. & Brazer, D. (2016). *Striving for equity: district leadership for narrowing opportunity and achievement gaps*. Cambridge: Harvard Educational Press.

Sturgis, C., & Jones, A. (2017). In pursuit of equality: A framework for equity strategies in competency-based education. Retrieved from:

<https://www.inacol.org/resource/in-pursuit-of-equality-guiding-principles-for-equity-strategies-in-personalized-competency-based-education/>

Theeboom, T, Beersma, B, & Van Vianen, A. (2013). Does coaching work? A meta-analysis on the effects of coaching on individual level outcomes in an organizational context. *The Journal of Positive Psychology*, 9(1), 1-18.

Tucker, M. (2016). How Massachusetts built a world-class school system. Retrieved from:

https://blogs.edweek.org/edweek/top_performers/2016/12/how_massachusetts_built_a_world-class_school_system.html

U.S. Department of Education Office of Educational Technology (2016). *Future ready learning: reimagining the role of technology in education. 2016 national education technology plan*. Washington, DC: U.S. Government Printing Office.

Morgan, André S. – Ed.L.D. Capstone

Vertberger, Y. (1998). *Risk taking and decision-making: foreign military intervention decisions*. Stanford, CA: Stanford University Press.

Wagner, T., & Dintersmith, T. (2015). *Most likely to succeed: preparing our kids for the innovation era*. New York: Scribner.

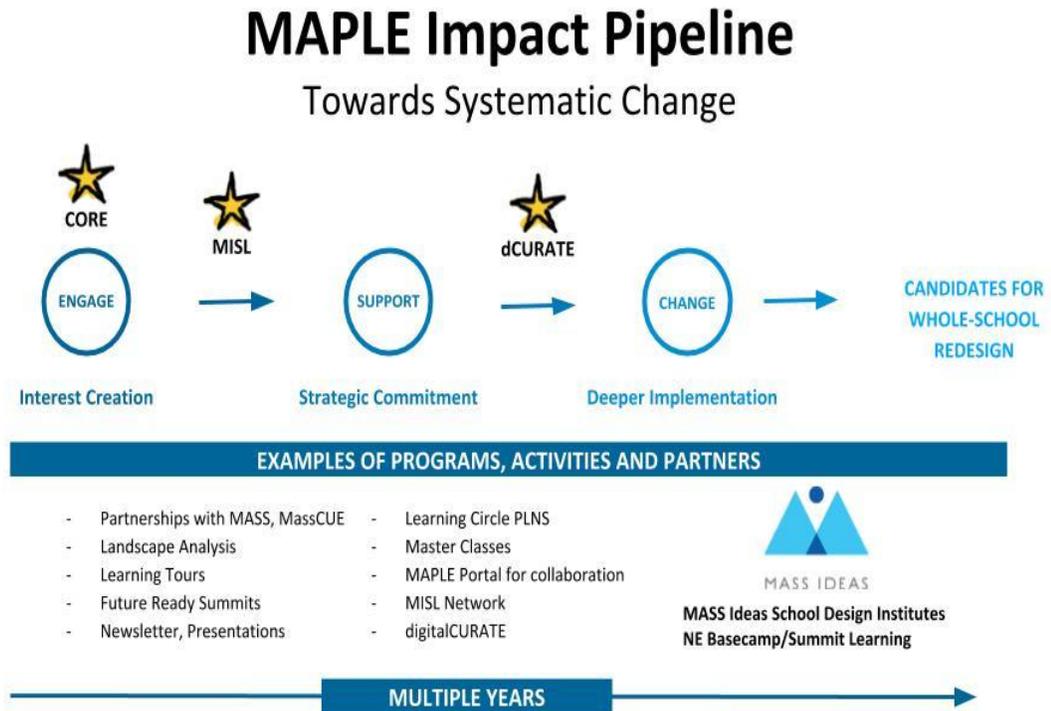
Western Australia, Department of Education (2015). *Aboriginal cultural standards framework*. Perth, Australia: Department of Education.

Wong, Alia (2016). What are massachusetts public schools doing right? Retrieved from: <https://www.theatlantic.com/education/archive/2016/05/what-are-massachusetts-public-schools-doing-right/483935/>

Zmuda, A., Curtis, G., & Ullman, D. (2015). *Learning personalized: the evolution of the contemporary classroom*. San Francisco: Jossey-Bass

Artifacts and Appendices

Appendix 1: How MAPLE will achieve goals in 2018-2019



Efforts for the 2018-2019 year will be focused on the Engage and Support areas:

Appendix 2: MAPLE Definition of Personalized Learning

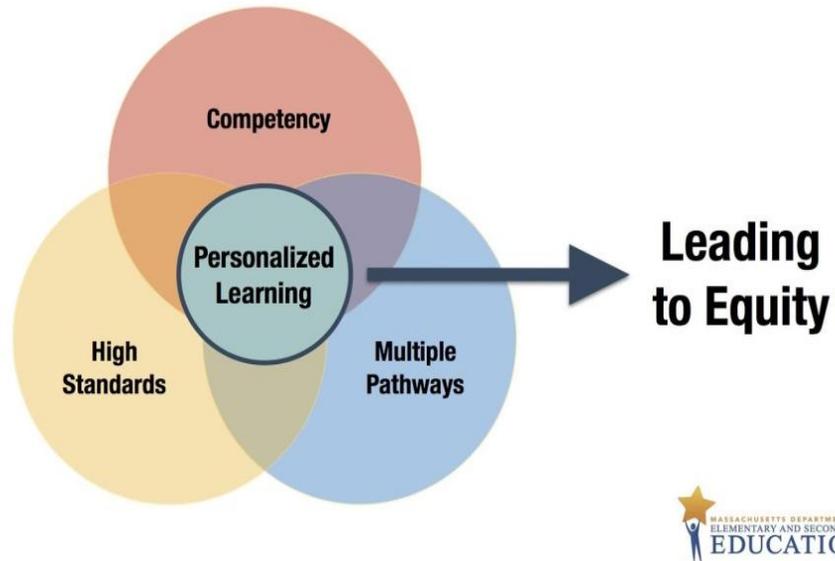
Personalized learning seeks to accelerate student learning by **tailoring the instructional environment – what, when, how and where students learn** – to address the individual needs, skills and interests of each student. **Within a framework of established curriculum standards and high expectations, personalized learning motivates students to reach their goals.** Students take ownership of their own learning and develop deep, personal connections with each other, their teachers and other adults. **Technology is necessary to implement personalized learning effectively, affordably, and at significant scale.** **Teachers leverage technology to gain detailed and timely knowledge of their students that guides instruction.** Effective use of technology allows teachers and students to focus more on creativity, critical thinking, and collaboration.

Note: This definition is accompanied by the following figure that aligns with the color-coded definition.



Appendix 3: Equity and Personalized Learning

Ensuring Equitable + Personalized Learning



This visual was included in a presentation given to the Massachusetts Board of Education, denoting a connection between personalized learning and equity. MAPLE uses this as part of....

Appendix 4: Work Tasks

<u>Strategic Project Tasks</u>	<u>Additional Tasks</u>
<ul style="list-style-type: none"> Supported the preparation for the launch of the MISL network. 	<ul style="list-style-type: none"> Engaged strategic planning for a summit using the Future Ready Personalized Learning structure.
<ul style="list-style-type: none"> Planned in-person and virtual coaching sessions for MISL. 	<ul style="list-style-type: none"> Refined the goals and outcomes for MAPLE and MISL.
<ul style="list-style-type: none"> Co-drafted three bright spot profiles. 	<ul style="list-style-type: none"> Helped plan learning tours with MAPLE districts.
	<ul style="list-style-type: none"> Developed an introductory video of personalized learning.
	<ul style="list-style-type: none"> Helped MAPLE and MISL consider how equity can be actionable with personalized learning.
	<ul style="list-style-type: none"> Co-developed the MISL Equity and Unconscious Bias Professional Development for change management teams.
	<ul style="list-style-type: none"> Developed Memorandum of Understanding (agreement addendum) for the districts with which MAPLE developed bright spot profiles.
	<ul style="list-style-type: none"> Drafted and co-wrote reports for stakeholders.
	<ul style="list-style-type: none"> Developed a district superintendent school committee toolkit.
	<ul style="list-style-type: none"> Co-developed a proposal for research partnership with Boston College.
	<ul style="list-style-type: none"> Developed a School-Visit Plan for MISL.
	<ul style="list-style-type: none"> Completed an application of inquiry for a local foundation grant that would allow MISL to launch and implement a second year initiative.

Appendix 5: MISL Coach School Visit Plan

Who:

- Amy and André

Objectives:

- Establish a format for in-person school visits with the MAPLE / MISL teams.
- Monitor MISL team progress towards implementing Personalized Learning Action Plans.
- Address challenges or questions that the team has about Personalized Learning to date.

Visit Plan (2 hours) *Note: Plan can be modified to 1 hour.*

Time	Min	Activity
	5	<u>Check -in with school team</u> <ul style="list-style-type: none"> • How is the team doing/feeling about the work to date?
	25	<u>Monitoring</u> <ul style="list-style-type: none"> • Coach reviews objectives and key activities for the day’s meeting. • Coach reviews the focus area (for consistency) and helps teams to connect the focus area/s to personalized learning (if necessary). • Team members identify questions they would like to discuss with the coach in the meeting. • <u>Coach:</u> Is there anything the team has encountered that would be helpful to discuss? • <u>Coach:</u> Is there anything else “bubbling” to the surface? • <u>Coach:</u> Is the team encountering challenges in sharing and implementing PL (campus-wide) without it being viewed as “one more thing” or a new initiative, but rather as a way of doing business? If yes, what are challenges? <i>Note: The coach may offer strategies for how teams may help colleagues not feel overwhelmed with the process and procedures for understanding and implementing Personalized Learning.</i>
	25	<u>Progress</u> <ul style="list-style-type: none"> • <u>Coach:</u> Asks the team probing questions and offers ideas for how the team can address their questions and move forward in implementation.

		<ul style="list-style-type: none"> • <u>Coach</u>: What activities has the team undertaken to date related to implementation? • <u>Coach</u>: What is the evidence that progress is being made? <i>Note: Coach may consider collecting artifacts as evidence of progress and for due diligence purposes.</i> • <u>Coach</u>: Where does the team need support from the coach (short- and long-term)? 				
	60	<p><u>Classroom Visits</u></p> <ul style="list-style-type: none"> • Visit 2-4 classrooms to observe examples of Personalized Learning in action (related to the action plan). • Observe (if possible) existing systems and structures that support or thwart the implementation of personalized learning. 				
	20	<p><u>Reconvene with Team</u></p> <ul style="list-style-type: none"> • Coach: Offer feedback on observations. • Coach: Asks team the take-away/s from the day’s visit? • Assess what worked well and what did not during the visit. • <i>Notes: (1) The coach should draft out the below chart for the team as a way to gather immediate feedback and model our orientation towards action, assessment and adjustment. (2) This can further be used to plan the next meeting, taking care to address the deltas.</i> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; vertical-align: top;">+ (What worked well)</td> <td style="width: 50%; text-align: center; vertical-align: top;">⊖ (What to change in future visits)</td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> </table>	+ (What worked well)	⊖ (What to change in future visits)		
+ (What worked well)	⊖ (What to change in future visits)					
		<p><u>Team Wrap-Up</u></p> <ul style="list-style-type: none"> • Answer lingering questions from the team. • Determine next steps and confirm next virtual and in-person meeting dates. 				

Appendix 6: What Will Success Look Like?

**Progress of Personalized Learning Initiatives
Determine Metrics & Explain Intended Outcomes**

Pick one of your PL Initiatives and explore your ideas with your colleagues:

1. As you implement your PL Initiatives, what MEASURES THAT MATTER* or other types of metrics are you using to determine progress?

1. State Testing	16. External Evaluation
2. NWEA MAP	17. Student Pace on Mastery
3. Teacher-Generated Assessments	18. Student Ownership of Learning
4. Student Surveys	19. Student Retention
5. Rubric-Based Evaluation	20. Student Attendance
6. Staff Surveys	21. Rate of Adoption within School
7. School Culture	22. College Enrollment
8. Family Surveys	23. Student Projects
9. Student Conversations & Focus Groups	24. Family Conversations & Focus Groups
10. Teacher Conversations and Focus Groups	25. College Persistence
11. PSAT/ACT/SAT & College Entrance Req.	26. Performance Relative to Other Schools
12. Social Emotional Learning	27. Replication by Other Schools
13. Student Progress on Individual Goals	28. Student Enrollment
14. Teacher Practice	29. Staff Retention Rate
15. Standardized Formative Assessments	30. Credit Accumulation
	31. OTHER

* This list is from [NEXT GENERATION LEARNING CHALLENGE’S Measures that Matter Most Research Report](https://www.nextgenlearning.org/resources/measures-that-matter-most-research-report) <https://www.nextgenlearning.org/resources/measures-that-matter-most-research-report>

2. What do you want to see as a result of this PL Initiative?

- a. Is your initiative related to instructional inputs or student outcomes?
- b. Are your success measures short-term (6 months to 1 year) or long-term (2-3 years)?
- c. What will your data look like when your PL Initiative is successful? DESCRIBE it in vivid detail with a chart, graph, or other form of evidence.

3. Finally, share your metrics that matter. Are we CONVINCED?

Appendix 7: MAPLE/BC Research Partnership

Project Background, Overview, & Goals.

A promising approach to advancing educational equity and improving schools focuses on student-centered learning. Learning is “student-centered” when it foregrounds individual interests and needs, focuses on developing competencies, occurs in flexible spaces and modalities, and is owned by the participants (Nellie Mae Education Foundation, 2015). Student-centered approaches are called “personalized” because they center on student needs and identities (Wolfe, Steinberg, & Hoffman, 2013). Teachers apply these principles by designing curriculum and instruction that is individualized and relevant, flexibly paced, and grounded in formative assessments (Hinton, Fischer, & Glennon, 2013). The MAPLE consortium, a partnership between LearnLaunch Institute and the Massachusetts Department of Elementary and Secondary Education, helps districts around the Commonwealth implement reforms to advance personalized learning (LearnLaunch Institute, 2019). The Collaborative Fellows Project proposed here is part of a larger collaboration between the Lynch School and MAPLE including ongoing collaborative meetings; submission of a grant proposal to Jobs for the Future in June, 2018 (not funded); helping to host a summer institute on personalized learning in July, 2018; and development of an evaluation plan in fall, 2018 followed by its piloting in spring 2019 with support from Lynch.

This Collaborative Fellows Project seeks funding to develop and implement the first year (summer 2019 to spring 2020) of a longitudinal evaluation of MAPLE as a network-based school system change initiative. Evaluation processes and results will facilitate leaders’ ongoing planning and support proposals for extramural funding. Results will build capacity for implementing personalized learning by developing and facilitating use of multimedia cases as teaching materials for graduate level courses at Lynch and for MAPLE school-based teams.

Project Team Members & Participants

Dr. Gates will lead this project with Dr. Martin Scanlan, as a consultant, in close collaboration with MAPLE leaders – Dr. Ann Koufman-Frederick, chief academic officer; David O’Conner, executive director of MAPLE; Dr. André Morgan, deputy academic officer; and Amy O’Connell, project director. Participants include school leaders and teachers from 14 "Catalyst" members (districts strategically committed to personalized learning and currently sharing their experiences) and 26 "General" members (districts interested in the topic and possibly beginning to implement personalized learning). Three MESA students will contribute to this project: Haylea Hubacz, first year MEd student and Olivia Szendey, first year PhD student, who helped develop the evaluation plan; and Matias Placencio, second year PhD student, with expertise in social network analysis. Needs/Opportunities Being Addressed. Landscape analysis (Koufman-Frederick, Klau, K., O’Connor, & Niegelsky, 2017) indicates the need for a network approach to foster personalized learning practices in MA schools and underscores the lack of metrics to judge progress towards personalized learning practices, which this project addresses.

Evaluation Process, Questions, & Methods

The current project addresses four collaboratively developed questions using a sequential mixed methods design: 1) How are (and should) personalized learning, the MAPLE network, & equity be conceptualized? During summer 2019, we will interview MAPLE internal leadership, review MAPLE documents, and analyze relevant educational literature. We will then use critical systems heuristics (Ulrich & Reynolds, 2010; Gates, 2018) to consider the boundaries around each of these concepts descriptively and normatively in order to critically define these concepts. 2) What is the theory-of-change that bridges personalized learning and equity? During summer and fall 2019, we will review literature and conduct informational interviews to build a theory-of-change that describes how a school-based network aimed at incorporating personalized learning in districts, schools, and classrooms can contribute to equitable learning experiences and outcomes for students. This theory-of-change will partially inform the next two evaluation questions as well as future evaluation work focused on outcomes. 3) How are relational networks amongst educators within MAPLE member districts (at the district and school levels) addressing personalized learning and equity? In order to identify how the network is forming and developing, we will survey MAPLE members (late fall-late spring). Using Social Network Analysis (SNA) methods, we will characterize how the information, experiences and practices on personalized learning flow throughout the network, and how this network is structured based on the interactions among its members. Analytic tools like Sociograms and different Actor's Centrality Measures (Wasserman and Faust, 1994; Daly, 2012; Borgatti, Everett, and Johnson, 2013; Carolan, 2014) will help characterize the network structure. 4) What distinguishes *successful* personalized learning, its contributions to equity, and the contextual factors that help or hinder success? In spring 2019, we will use success case method (SCM) (Brinkerhoff, 2003, 2005) to develop case studies of select teams which will serve two purposes: rich qualitative data to complement the SNA and initial case study write ups that will be further developed into multimedia formats to be used as teaching materials in Lynch courses.

Assessing Success & Anticipated Outcomes

Success will be assessed by the utility of the evaluation process and results. Three outcomes are anticipated: 1) evaluation data will be shared with MAPLE leaders to modify next year's programming; 2) scholarly presentations and two manuscripts prepared for education and evaluation journals; 3) multimedia case studies will be developed for Lynch courses (Halverson et al., 2004).

Sustainability & Future Directions

Evaluation data regarding how MAPLE works and its outcomes is essential to the sustainability of MAPLE over time and to secure extramural funding. The evaluation team will seek extramural funding from funders such as Spencer's small research grants or William T. Grant Foundation research grants on reducing inequality to continue this longitudinal evaluation to track MAPLE network development over time.