



A transformational  
vision for education  
in the US.

## WHO WE ARE AND WHY WE CAME TOGETHER

We are a group of educational practitioners, scholars, business people, parents, and advocates with an extraordinarily diverse set of backgrounds, positions, and perspectives. Collectively, we are engaged in blended learning, disruptive technology, deeper learning, connected learning, personalized learning, social and emotional learning, community schooling, out-of-school learning, teaching improvement, the teaching profession and its collective leadership, school choice, and more. We recognize, honor, and value the points of view of all of those engaged in the work of education: learners, teachers, parents, unions, businesses, charter schools, administrators, civic leaders, and education advocates and organizations.

We came together recognizing that we have strongly held and often divergent views on a number of current issues and controversies in public education. We were determined to create a vision of the future of education that could unite us and many others. We believe that it is time for a new conversation about education. Not only are we tired of the same recurring debates about what is wrong with today's education system and who is to blame for its inadequacies, but we also realize that no amount of tweaking or modifying the current, industrial-era system will fulfill our vision of all children learning and thriving to their full potential.

**SIMPLY PUT**, the current system was designed in a different era and structured for a different society. Our economy, society, and polity are increasingly at risk from an educational system that does not consistently prepare all children to succeed as adults and is least effective for the children facing the greatest social and economic challenges. Conversely, the Internet revolution has created a once-in-a-generation opportunity for new approaches to learning. Our growing recognition of the importance of skills and dispositions is also sparking a shift toward experiential learning. In short, we see both an imperative for transformation and many promising avenues for re-envisioning the learning experience.

In order to envision something new, we engaged in a challenging, dialogic process to reimagine learning. Working with highly skilled facilitators, we met for six two-day meetings over an 18-month period, from April 2013 until October 2014. At the start of this process, we were a collection of individuals on a battlefield, fighting, often against each other, for our own answers to the problems of the current education system. Through this process, we discovered that each of us, to a person, shares a fundamental commitment for all children to learn and thrive regardless of their circumstances.

United in this commitment, we worked together to reimagine education for all children. We grappled with hard questions about the outcomes we want for all learners, the learning environments that could foster those outcomes, and the systems and structures necessary to create those environments. While we knew a reimaged education system would not be a panacea for poverty and the other forms of systemic disadvantage facing our learners, we challenged ourselves to envision a system designed to meet all learners where they are and allow each to reach his or her full potential. We contended with the diversity of challenges that learners entering the education system have. We understand that education alone cannot correct social and economic inequities; we believe it will contribute greatly to mitigating their impact.

Emerging from this process, we stand united behind a vision for a new future of learning. In this future, the education system is structured with the learner at its center. Learners seek mastery not only of core knowledge but also of skills and dispositions that promote lifelong success. Learning experiences are intentionally designed to support, challenge, engage, and excite all learners. To realize this vision for all children, incremental change is not sufficient. It is time to transform education.

This document is designed to catalyze a new national conversation about education transformation and to become a rallying point for a network of pioneers who are already or would like to be working along similar lines. It puts forward a vision for the future of learning but does not provide a one-size-fits-all answer for how to get there. Instead, it stands as an invitation and challenge to engage in the next set of conversations about how this vision could manifest itself in the diversity of communities across the country.

## OUR COMMITMENT: TRANSFORMING EDUCATION

We are committed to transforming education so that all children experience great learning.

We envision a learner-centered system in which all children thrive, are able to deeply engage in their own communities, their nation, and the global community, and are prepared and excited for their future. We are committed to what we believe is a widely held view of the purpose of education:

**To enable all children to fulfill their full potential as empowered individuals, constructive members of their communities, productive participants in the economy, and engaged citizens of the US and the world.**

We also share the widely held belief that education is vitally important to the health and well-being of individuals and society and, therefore, exists as a public responsibility. The investments we make in children are investments in our communities, our country, and the world.

Because the current system was designed nearly 100 years ago for a different society and economy, it can no longer deliver on the purpose to which we are committed, nor can it provide the individual and public benefits that we seek. Our vision offers a new set of lenses that brings into focus both the limits of the current system and the possibilities offered by a fundamentally different, learner-centered system.

With these lenses, we recognize and are ready to answer the growing call from learners, parents, educators, communities, and national leaders for a reimaged way to educate children. Our

vision will engage and support those pioneers already experimenting with ways to develop learner-centered education, elevating their work from the sea of reform efforts. It will also provide a rallying point for new innovators and supporters who see the potential for a shift in paradigms and want to join this emerging network.

## THE CHALLENGE: AN INDUSTRIAL-ERA SYSTEM IN THE 21ST CENTURY

The American public education system arguably served the majority of learners well for much of the 20th century, providing core knowledge and basic skills to millions and facilitating transitions from rural to urban life; from other countries to the US; and from a lower- to a higher-skilled workforce. We have inherited this system, which is based on a standardized, “factory” model. Teachers are given an age-group cohort of children at the beginning of each school year, a standardized curriculum, and a matching set of assessments. Despite teachers’ best efforts to individualize along lines of difference, opportunities to tailor the content, pace, and method of instruction are limited. Students are expected to work with their assigned material and move along with their age cohort as the years pass. Grading and other assessment tools are designed primarily to assess the results of learning, rather than to improve learning as it happens.

Though there are some benefits to this model, there are also significant and increasing costs. Many students are ushered on despite an insufficient and limited understanding of the content and inadequate maturation, leaving them with serious gaps in their ability to learn at the next level. Others, whose pace in certain areas exceeds that of their peers, are often denied the opportunity to explore beyond the grade’s standardized curriculum.

Moreover, most students’ formal learning experiences are confined within school walls and devoid of enriched and diverse opportunities that would be available in their communities and through online resources. Those with resources can supplement their education with “extra-curricular” activities and are, thus, better positioned for success. Those who cannot are often left underprepared. Coupled with persistent poverty and other forms of disadvantage, the current system produces increasingly unequal outcomes.

While this factory-school model remains in place, the world is changing. The demographics of the nation’s population have been shifting dramatically in the past fifty years, placing growing demands on the education system. Young adults emerging from the system are being asked to contribute to and function within an increasingly globalized society and workforce. Collaborative norms are emerging as businesses, governments, and individuals are networking across borders. Employers are calling for employees who are not only able to demonstrate high-level writing and communication skills, but also the capacity and creativity to adapt and contribute as the demands of their jobs fluctuate. Similarly, with the unprecedented and exponentially expanding access to content and information, success no longer demands traditional memorization and rote learning of content but, instead, requires the ability to absorb, analyze, and apply content. The future begs for individuals ready and eager to grapple with and solve the problems of today and tomorrow.

We believe that the current system’s one-to-many approach to teaching, standardized curriculum, age-based cohorts, and classroom-contained instruction are all limitations on our children’s opportunities to learn and thrive in this changing world. Too often these system components leave teachers exhausted, parents frustrated, and children uninspired. We see that it is not enough to continually measure, tweak, and improve the system bit by bit. Such adjustments will not ultimately produce the results we want because they iterate a system fundamentally structured for standardization. In order to fulfill the purpose of education for all children and create extraordinary learning for each and every child, our system must be entirely transformed.

## THE FUTURE: A LEARNER-CENTERED PARADIGM

To contextualize the transformation of education, we see a paradigm shift—from the Industrial Age’s school-centric paradigm to a new learner-centered, network-era paradigm. The learner-centered paradigm for learning functions like a pair of lenses that offers a new way to look at, think about, talk about, and act on education. It constitutes a shift of perspective that places every learner at its center, structures the system to build appropriate supports around him or her, and acknowledges the need to adapt and alter to meet the needs of all children.

The learner-centered paradigm changes our very view of learners themselves. Learners are seen and known as wondrous, curious individuals with vast capabilities and limitless potential. This paradigm recognizes that learning is a lifelong pursuit and that our natural excitement and eagerness to discover and learn should be fostered throughout our lives, particularly in our earliest years. Thus, in this paradigm, learners are active participants in their learning as they gradually become owners of it, and learning itself is seen as an engaging and exciting process. Each child’s interests, passions, dreams, skills, and needs shape his or her learning experience and drive the commitments and actions of the adults and communities supporting him or her.

The chart below highlights some of the key contrasts between the current paradigm and the new one that we envision.

ASPECT	CURRENT PARADIGM	LEARNER-CENTERED PARADIGM
<b>World View</b>	<b>INDUSTRIAL AGE</b>	<b>NETWORKED AGE</b>
<b>Frame of Reference</b>	Factories and Assembly Lines	Networks and Lateral Connections
<b>Model</b>	<b>SCHOOL-CENTRIC :</b> All components of the system are designed for efficiency of education delivery in the context of standardized schools	<b>LEARNER-CENTRIC:</b> All components are designed for the education experience to be adaptable to the needs and potential of each learner and supports the highest possible outcomes for each and every learner
<b>Model Components</b>	<ul style="list-style-type: none"> <li>Standardized age cohorts</li> <li>Linear curricula divided into subjects</li> <li>Education factories called “schools”</li> <li>Learning experiences designed to impart knowledge in long-established categories</li> </ul>	<ul style="list-style-type: none"> <li>Personalized learning that is competency-based and has a wide range of learning environments and adult roles</li> <li>Learning experiences enable learners to develop their knowledge, skills, and dispositions in a relevant and contextualized manner</li> <li>Learners are embedded in a network of stable and supportive relationships with adults and are encouraged to learn through self-directed discovery, with their peers, and with the guidance of adults</li> </ul>

The time is ripe for this transformation. We are ready for a system that both harnesses today’s potential and has the capacity to adapt rapidly to the inevitable changes and advances of tomorrow. We live in a time of rapid innovation and ever-expanding possibilities. We know more about how children learn and what effective instruction looks like, and we have new under-

standings of how the brain works. Similarly, the emerging science of effective instruction offers new opportunities to facilitate engaging, dynamic learning that recognizes the rich diversity of learning styles and backgrounds present in our country. Advances in technology facilitate learning in ways never before imagined. Global networks and relationships abound. Furthermore, experimentation with how to transform the current system to a learner-centered one has already begun.

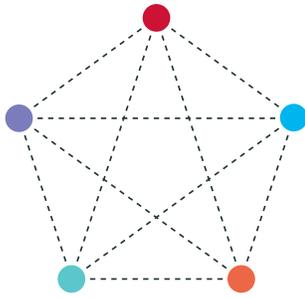
## THE DESIGN: LEARNING DOMAINS AND ELEMENTS OF THE LEARNING EXPERIENCE

For the next generation of learners to succeed and thrive, their learning experiences must facilitate their development in three primary domains: knowledge, skills, and dispositions. The below chart includes our description of each of these domains and a set of examples adapted from the work of the Council of Chief State School Officers.

KNOWLEDGE	SKILLS	DISPOSITIONS
<b>The theoretical or practical understanding of someone or something.</b>	<b>The capacities and strategies that enable learners to apply knowledge to novel situations, engage in higher order thinking, problem solve, collaborate, communicate effectively, and plan for the future.</b>	<b>The behaviors and ways of being that contribute to learners fulfilling their full potential.</b>
<ul style="list-style-type: none"> <li>• World class standards</li> <li>• Career and technical education</li> <li>• Other content areas and essential literacies</li> <li>• Global competence</li> <li>• Applied knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Learning how to learn</li> <li>• Time/goal management</li> <li>• Critical thinking</li> <li>• Problem solving</li> <li>• Working collaboratively</li> <li>• Communicating effectively</li> <li>• Metacognition</li> <li>• Self/social awareness and empathy</li> <li>• Creativity &amp; innovation</li> </ul>	<ul style="list-style-type: none"> <li>• Agency (self-efficacy)</li> <li>• Curiosity</li> <li>• Initiative</li> <li>• Resilience</li> <li>• Adaptability</li> <li>• Persistence</li> <li>• Leadership</li> <li>• Ethical behavior and civic responsibility</li> <li>• Self-control</li> </ul>

There is evidence that this triad of domains can be mutually reinforcing. Deep engagement with disciplinary knowledge builds and develops learners’ skills—such as communication, collaboration, creativity, problem solving, metacognition, and critical thinking—and dispositions—such as resilience, curiosity, resourcefulness, persistence, and adaptability. Strong skills and dispositions can then allow learners to broaden and deepen their knowledge, driven by their own interests and motivations, as well as by agreed standards for competency in these domains.

To ensure development in these three domains for all learners, we envision learning experiences characterized by the following five interrelated elements. Taken together, they form our new design for learning:



**COMPETENCY-BASED**

**PERSONALIZED, RELEVANT & CONTEXTUALIZED**

**LEARNER AGENCY**

**SOCIALLY EMBEDDED**

**OPEN-WALLED**

These five elements are not meant to serve as a blueprint for a rigid model to be implemented everywhere. Instead, they serve as a “North Star” to guide innovation. They do not create a single roadmap that can be followed the same way in every learning community. Realizing new designs will be an iterative process; much experimentation will be necessary to discover ways that these five elements can work together and reinforce one another to create excellent learning experiences for all children, regardless of their circumstances.

**COMPETENCY-BASED** learning is an alternative to age- or grade-based learning. In competency-based learning, each learner works toward competency and strives for mastery in defined domains of knowledge, skills, and dispositions. Learners’ trajectories toward mastery are guided and managed, rather than placing the emphasis on their achievement of specific benchmarks in a fixed amount of time. Competency-based learning recognizes that all learners are unique and that different learners progress at different paces. It allows the system structure to support variation of learning speeds in accordance with each learner’s specific challenges and needs. Assessments, both formative and summative, are utilized on a continuous basis to inform the learning and instructional strategy for each learner. Additional resources are provided to learners who need help to accelerate the pace of competency development.

**PERSONALIZED, RELEVANT, AND CONTEXTUALIZED** learning is an approach that uses such factors as the learner’s own passions, strengths, needs, family, culture, and community as fuel for the development of knowledge, skills, and dispositions. Learning experiences are leveraged to bridge gaps and meet learning challenges; designed to expand interests, opportunities, and perspectives; and responsive to learners’ passions. At the same time, they are rooted in real-world contexts and empower the learner to demonstrate his or her learning in a variety of authentic ways and settings. Personalized, relevant, and contextualized learning also acknowledges that different learners face different challenges to learning, whether in health, safety, economic situation, emotional wellbeing, social interactions, or competency development. Those challenges are both identified and addressed so that the learner is adequately supported, thus ensuring that his or her current life situation does not constrain the breadth or depth of learning.

Learning that is characterized by **LEARNER AGENCY** recognizes learners as active participants in their own learning and engages them in the design of their experiences and the realization of their learning outcomes in ways appropriate for their developmental level. As such, learners have choice and voice in their educational experiences as they progress through competencies. Harnessing his or her own intrinsic motivation to learn, each learner strives to ultimately take full ownership of his or her own learning.

**SOCIALLY EMBEDDED** learning is rooted in meaningful relationships with family, peers, qualified adults, and community members and is grounded in community and social interaction. It values face-to-face contact, as well as opportunities to connect virtually, and recognizes the significance of establishing continuity in children’s lives through the development of stable relationships. Independent exploration and practice; collaborative group work; structured, intentional instruction; and structured and cooperative play, among other experiences, are integrated to develop learners’ competencies. Both peers and adults are recognized as integral partners in learning, and learners are encouraged to interact with those developing at differ-

ent competency rates, from different backgrounds, and with different interests. Furthermore, socially embedded learning catalyzes and structures partnerships with families, community-based employers, civic organizations, and other entities that can foster learning.

**OPEN-WALLED** learning acknowledges that learning happens at many times and in many places and intentionally leverages its expansive nature in the learner's development of competencies. It creates and takes full advantage of opportunities in a variety of communities, settings, times, and formats. All learning experiences, whether highly structured or exploratory and experiential, are valued, encouraged, and integrated into the learner's journey. These experiences may be in-person, virtual, or blended. Play, recreation, technology-enabled experiences, community-based work, and service opportunities, for instance, are all recognized as legitimate vehicles for learning. While opening learning to a myriad of settings, open-walled learning also provides learners with a physical space in which to socialize, collaborate, and learn with peers and adults. Where a particular community possesses relatively few educational resources, they are supplemented to provide learners with authentic, rich, and diverse learning opportunities.

## COMPONENTS OF THE EDUCATION SYSTEM: LEARNER-CENTERED IMPLEMENTATION

In order to fully realize a reimagined learning environment, the future education system will need several core components. Local communities and other constituencies will need to experiment with those components to discover how they can be implemented together to best support each and every learner. Thus, the expression of the five elements of great learning will vary across the nation according to the needs and resources of the learners and their communities. Components include the following:

In the new vision, **AGREED DOMAINS AND STANDARDS FOR KNOWLEDGE, SKILLS, AND DISPOSITIONS** are established to guide learning. Learning outcomes are defined in terms of mastery across all three of these domains. Education stakeholders jointly own the standards and have a clear vision of what mastery looks like. Educators create learning experiences and assessments that develop and track mastery in all three of these domains.

**ADULTS IN THE SYSTEM** hold diversified and specialized roles to facilitate and guide learning in formal and informal learning environments, virtually, at home, and in the community. These reimagined roles for professional educators, in particular, take advantage of the emerging science around effective instructional practice, ensuring that educators are themselves equipped with the knowledge, skills, and dispositions to guide, instruct, encourage, and support learners. Deep expertise in pedagogy and child development is valued, as well as expertise in a particular discipline, body of knowledge, or skill set. Educators, both individually and collectively, are empowered to take leadership responsibilities along with other key stakeholders (e.g. families, communities, employers, social service agencies), while opportunities for professional development continue to support them in their own growth. The institutions that prepare, support, and elevate professional educators are transformed to serve them in their reimagined roles.

Furthermore, the reimagined roles for adults in the system offer families, businesses, social service agencies, community groups and members, and other interested parties the opportunity to play meaningful roles in the system. Creating coordinated and networked teams, which include all of these varied roles, provides learners with the supports necessary to ensure that they achieve competency and mastery in agreed domains.

**TECHNOLOGY** enables reimagined learning to happen for all learners, as it increases accessibility and reduces costs. Technology integrates diverse sources of learning experiences, embeds assessment seamlessly into learning, helps provide adaptable and personalized learning

pathways, and enables coordination among networks of learners and adults. Technology supports learning in diverse settings and times, helping to make it adaptable to the learner. With the assistance of technology, adults in the system have expanded opportunities to develop meaningful relationships with learners and to guide, facilitate, and encourage their learning.

**ASSESSMENTS** are aligned with critical knowledge, skills, and dispositions to guide each learner towards mastery of agreed upon competencies. There are three primary types of assessment:

<p>Assessment <b>OF</b> LEARNING is summative and performance based.</p>	<p>Used this way, <b>assessment judges results</b> against established standards and benchmarks. This most traditional use of assessment can reveal how the learner and the system are performing over time.</p>
<p>Assessment <b>FOR</b> LEARNING is formative, real-time, and diagnostic.</p>	<p>Used this way, <b>assessment provides immediate feedback</b> both to the learner and to adults on developing knowledge, skills, and dispositions while learning is actually happening.</p>
<p>Assessment <b>AS</b> LEARNING is self-examination by the learner.</p>	<p>Used this way, <b>assessment supports the development of metacognition</b>, the understanding of how learners learn and who the learners know themselves to be. This use of assessment provides the kind of self-awareness needed to become a better learner and to develop higher-order skills and dispositions.</p>

In the new paradigm, assessment “for” and “as” learning are the predominant types employed. Assessments help learners and adults identify progress and challenges and tailor strategies and pathways towards mastery. Assessments are embedded in the learning experience and provide opportunities to demonstrate mastery through performance-based tasks and in real-world settings.

Like assessments, **DATA** is employed to further children on their learning journeys, to support their understanding of their own learning, and to provide information on their progress to adults in the system. The amount and type of data shared is tailored to protect the child’s privacy and wellbeing. The data systems and data privacy protections used in other sectors, such as health-care, serve as particularly useful models in the arena of education data.

**REIMAGINED SPACES FOR LEARNING**, whether they are in education centers, libraries, museums, community centers, or other locations, provide learners and the supporting adults with a physical space to gather, play, socialize, and learn. They give learners the opportunity to engage with each other, their educators, their families, and community members seeking to support their growth. Reimagining the way these spaces are organized and where they are located provides opportunities to integrate learning experiences for children into the community. They bring health and social services and community-based activities more directly into the daily fabric of learning, when needed. Learning spaces also offer appropriate custodial care to learners, particularly younger ones.

**A COORDINATED NETWORK OF INSTITUTIONS, ORGANIZATIONS, AGENCIES, ASSOCIATIONS AND FEDERATIONS, AND BUSINESSES** offers open-walled, relevant, and contextualized learning resources and opportunities to learners and creates avenues for learners to be involved in and engage with the community. Additionally, this network promotes collaboration and communication amongst entities working to support learners’ health, nutrition, safety, and wellbeing.

**RESOURCE ALLOCATIONS** focus on ensuring that every learner has adequate support, spaces, resources, and tools to meet their needs and best support their learning experiences. The focus on each learner’s progress along competency domains drives more resources to those learners who have stalled in their progress in particular competency areas or those who have started behind their peers. Financial resources will be applied and integrated in ways that support the whole child, ensuring that each child has access to and receives the necessary educational, social, emotional, and health supports and services, regardless of economic circumstances.

We affirm that education is a public good and, therefore, exists as a public responsibility that society has to each of its members. Given its vital importance, both public and private investment in education are essential and will be used to move the system into the learner-centered paradigm.

In addition to experimentation with these core system components, we recognize the need to innovate and create systems of funding, governance, and quality assurance consistent with the vision, as well as the need to develop supportive public policies.

The chart below juxtaposes some of the model components of the current paradigm with those of the learner-centered one.

MODEL COMPONENT	CURRENT PARADIGM	LEARNER-CENTERED PARADIGM
<b>Organization of learners</b>	Organized in age cohorts	Learners learn individually and in diverse and shifting groups consistent with their developmental, social, and competency needs
<b>Curricula</b>	Standardized linear curricula divided into subjects	Relevant, contextualized curricula organized by competency
<b>Learner goals / Progress indicators</b>	Required credit hours and seat time	Development of competency in agreed domains of knowledge, skills, and dispositions in timeframes appropriate to each learner
<b>Role of learners</b>	Passive vessel to be filled	Active co-creators of their learning and development
<b>Role of adults</b>	Individual teachers expected to serve as content deliverers, curriculum developers, data assessors	Network of qualified adults facilitating learning and development
<b>Technology</b>	One-to-many communication tools (e.g. books, white boards, projectors)	One-to-one, one-to-many, many-to-many communication, networking, diagnostic, and content delivery tools
<b>Assessment</b>	Primarily “of” learning	Intentional assessment “for, as, and of” learning
<b>Resource Allocation</b>	Place- and formula-based funding uncorrelated with individual children’s needs	Financial resources applied and integrated to support the whole child
<b>Location</b>	Localized in a school building	Learning occurs at many times, in many places, and through many formats; a physical space is established for learners and adults to gather, socialize, and learn
<b>Meeting learner’s needs</b>	Differentiation of the standard model to meet learners’ needs	Personalization for each and every learner

## CREATING A NETWORK OF PIONEERS IN EDUCATIONAL TRANSFORMATION: AN INVITATION AND A CHALLENGE

Learner-centered education is an idea whose time has come. There is a growing hunger from education leaders, families, students, and communities for an entirely new way to educate children, for a reimagined way to foster thriving, highly engaged learners. They are seeking something transformational. Across the country, many communities and states are ready for a new vision and a fresh conversation.

We recognize the many efforts and leaders already actively seeking to transform the system into a truly learner-centered one. There is no shortage of pioneers experimenting with transformational ideas and practices. This is a realm populated by districts, states, unions, civic leaders, businesses, foundations, non-profits, universities, and individuals all starting from different access points and digging deep in different aspects of the vision. In partnership with these innovators, we seek to build a national, cross-sector network of people and organizations that are consciously and collaboratively experimenting within the new paradigm. This network will:

- Support, recognize, deepen, and learn from current experiments already innovating with one or more of the elements to create learner-centered environments for children
- Catalyze new experiments to explore how the design elements and system components of this vision can work across the full diversity of our country's communities
- Clear structural obstacles, such as seat-time requirements, to allow for local experimentation with the support of district and state actors
- Change the public narrative from one of fixing the current system to one about how to make extraordinary learner-centered learning available to each and every child

This emerging vision offers a North Star toward which to aspire, a language that creates the space of learner-centered learning, and the means to distinguish transformational efforts from those of reform. We invite those excited and interested to join us to engage deeply on the questions still to be answered and explore how this vision might manifest across the nation.

We are committed to accelerating a cultural tipping point where new norms of learner-centered learning will shift the nation to the realization that the current system cannot fulfill on the purpose of education for all kids and that we must, therefore, work together to create a re-imagined model for learning. With communities across the nation working to transform the old school-centric system to a new learner-centered one, we see the potential for a society of thriving learners, engaged parents, and inspired educators.



**Education Reimagined** seeks to accelerate the growth of the movement dedicated to transforming education in America by connecting, amplifying, and empowering pioneers and contributing to a new public conversation. We invite those excited and interested by the possibility of learner-centered education to discover more, join a growing movement, and begin a journey to make this a reality in diverse communities across the country. Visit our website at [www.education-reimagined.org](http://www.education-reimagined.org)  
Email us at [educationreimagined@convergencepolicy.org](mailto:educationreimagined@convergencepolicy.org)

*This is a living document. This vision will evolve to reflect the ongoing learning of pioneers about learner-centered education and the systems to support it.*

## VISION SIGNATORIES

**David Andrews**

Dean  
Johns Hopkins University  
School of Education

**Sig Behrens**

General Manager of  
Global Education  
Stratasys

**Stuart Butler**

Senior Fellow  
The Brookings Institution

**Sam Chaltain**

Writer & Communications  
Strategist

**Dwight Davis**

Assistant Principal  
DC Public Schools

**Rehan Dawer**

Founder  
Ethica Global Alliance

**Nick Donohue**

President & CEO  
Nellie Mae Education  
Foundation

**Lily Eskelsen**

President  
National Education Association

**Maddie Fennell**

Literacy Coach  
2007 Nebraska Teacher of the  
Year

**Lizabeth Fogel, Ph.D.**

Director of Education  
The Walt Disney Company

**Michael Hinojosa**

former District Superintendent  
Cobb County School District, GA

**Gisèle Huff**

Executive Director  
Jaquelin Hume Foundation

**Jennifer Humke**

Program Officer of Digital  
Media and Learning  
MacArthur Foundation

**John Jackson**

President & CEO  
The Schott Foundation for  
Public Education

**Andrew Ko**

Vice President and Head of  
Europe for Enterprise Business  
Samsung Electronics;  
former General Manager for  
Partners in Learning  
Microsoft Corporation

**Bobbi Macdonald**

Executive Director  
City Neighbors Foundation, Inc.

**Marc Porter Magee**

CEO & Founder  
50CAN

**Peter McWalters**

former Rhode Island  
Commissioner of Elementary  
and Secondary Education

**Robert O'Brien**

Principal  
New York City Public School

**Judy Pepler**

President & CEO  
KnowledgeWorks

**Stephen Robinson**

Superintendent of Schools  
Episcopal Diocese of Honduras;  
former President Southern  
Association of Independent  
Schools

**Shruti Sehra**

Partner  
New Profit Inc.

**Robert Sherman**

Consultant  
Social and Emotional Learning

**Stephan Turnipseed**

former President  
LEGO Education North America

**Randi Weingarten**

President  
American Federation of  
Teachers

**Jeff Weissglass**

President  
Board of Education at Oak Park  
and River Forest High School, IL

**Lara Knight Wheatley**

School Leader  
KIPP Houston High School

**Mark Wilding**

Executive Director  
PassageWorks Institute





As these Growth Academic Performance Index (API) and Adequate Yearly Progress (AYP) reports demonstrate, Mr. David Richards achieved success during his tenure as the Founding Principal of Summit Tahoma High School. Between the 2011-2012 and 2012-2013 reporting periods, Summit Tahoma met its growth targets in 2013 and achieved a high school statewide ranking of number nine.

The data also demonstrates Mr. Richards' ability to recruit and improve the academic performance of a diverse student body. >70% of students scored at or above proficiency across racial and socioeconomic groups in 2013.

**2012 vs. 2013 Growth Academic Performance Index (API) Reports<sup>1</sup>**

**2011-2012**

**Met Growth Targets**

**Schoolwide:**

**All Student Groups:**

**All Targets:** N/A

**Groups**

	Number of Students Included in 2012 API	Numerically Significant in Both Years	2012 Growth	2011 Base	2011-12 Growth Target	2011-12 Growth	Met Growth Target
Schoolwide	93		848	B	B	B	
Black or African American	6	No					
American Indian or Alaska Native	0	No					
Asian	14	No	946				
Filipino	5	No					
Hispanic or Latino	56	No	801				
Native Hawaiian or Pacific Islander	0	No					
White	12	No	900				
Two or More Races	0	No					
Socioeconomically Disadvantaged	41	No	810				
English Learners	27	No	791				
Students with Disabilities	4	No					



<sup>1</sup> <http://api.cde.ca.gov/Acnt2012/2012GrowthSch.aspx?allcds=43104390123794;>  
<http://api.cde.ca.gov/Acnt2013/2013GrowthSch.aspx?allcds=43104390123794>

## 2012-2013

### Met Growth Targets

**Schoolwide:** Yes  
**All Student Groups:** Yes  
**All Targets:** Yes

**2013 Statewide Rank:** 9   **2013 Similar Schools Rank:** 10

### Groups

	Number of Students Included in 2013 API	Numerically Significant in Both Years	2013 Growth	2012 Base	2012-13 Growth Target	2012-13 Growth	Met Growth Target
Schoolwide	181		848	849	A	-1	Yes
Black or African American	6	No					
American Indian or Alaska Native	0	No					
Asian	22	No	947	946			
Filipino	11	No	885				
Hispanic or Latino	119	Yes	812	801	A	11	Yes
Native Hawaiian or Pacific Islander	0	No					
White	16	No	907	900			
Two or More Races	7	No					
Socioeconomically Disadvantaged	91	No	825	810			
English Learners	56	No	832	791			
Students with Disabilities	11	No	696				

## 2012 vs. 2013 Adequate Yearly Progress (AYP) Report<sup>2</sup>

### 2011-2012

#### Participation Rate

GROUPS	English-Language Arts Target 95% Met all participation rate criteria? No					Mathematics Target 95% Met all participation rate criteria? No				
	Enrollment First Day of Testing	Number of Students Tested	Rate	Met 2012 AYP Criteria	Alternative Method	Enrollment First Day of Testing	Number of Students Tested	Rate	Met 2012 AYP Criteria	Alternative Method
	<b>Schoolwide</b>	104	100	96	Yes	G9	104	100	96	Yes
Black or African American	6	6	100	--	G9	6	6	100	--	G9
American Indian or Alaska Native	0	0	--	--	G9	0	0	--	--	G9
Asian	15	15	100	--	G9	15	15	100	--	G9
Filipino	5	5	100	--	G9	5	5	100	--	G9
Hispanic or Latino	66	62	94	No	G9	66	62	94	No	G9
Native Hawaiian or Pacific Islander	0	0	--	--	G9	0	0	--	--	G9
White	12	12	100	--	G9	12	12	100	--	G9
Two or More Races	0	0	--	--	G9	0	0	--	--	G9
Socioeconomically Disadvantaged	49	47	96	--	G9	49	47	96	--	G9
English Learners	29	29	100	--	G9	29	29	100	--	G9
Students with Disabilities	4	4	100	--	G9	4	4	100	--	G9

#### > Percent Proficient - Annual Measurable Objectives (AMOs)

GROUPS	English-Language Arts Target 77.8 % Met all percent proficient rate criteria? No					Mathematics Target 77.4 % Met all percent proficient rate criteria? No				
	Valid Scores	Number At or Above Proficient	Percent At or Above Proficient	Met 2012 AYP Criteria	Alternative Method	Valid Scores	Number At or Above Proficient	Percent At or Above Proficient	Met 2012 AYP Criteria	Alternative Method
	<b>Schoolwide</b>	93	65	69.9	No	G9	93	59	63.4	No
Black or African American	6	--	--	--	G9	6	--	--	--	G9
American Indian or Alaska Native	0	--	--	--	G9	0	--	--	--	G9
Asian	14	13	92.9	--	G9	14	11	78.6	--	G9
Filipino	5	--	--	--	G9	5	--	--	--	G9
Hispanic or Latino	56	33	58.9	--	G9	56	28	50.0	--	G9
Native Hawaiian or Pacific Islander	0	--	--	--	G9	0	--	--	--	G9
White	12	10	83.3	--	G9	12	10	83.3	--	G9
Two or More Races	0	--	--	--	G9	0	--	--	--	G9
Socioeconomically Disadvantaged	41	23	56.1	--	G9	41	23	56.1	--	G9
English Learners	27	14	51.9	--	G9	27	17	63.0	--	G9
Students with Disabilities	4	--	--	--	G9	4	--	--	--	G9

<sup>2</sup> <http://api.cde.ca.gov/Acnt2012/2012APRSchAYPReport.aspx?allcids=43104390123794;>  
<http://api.cde.ca.gov/Acnt2013/2013APRSchAYPReport.aspx?allcids=43104390123794>

## 2012-2013

### Participation Rate

GROUPS	English-Language Arts Target 95% Met all participation rate criteria? Yes					Mathematics Target 95% Met all participation rate criteria? Yes				
	Enrollment First Day of Testing	Number of Students Tested	Rate	Met 2013 AYP Criteria	Alternative Method	Enrollment First Day of Testing	Number of Students Tested	Rate	Met 2013 AYP Criteria	Alternative Method
	<b>Schoolwide</b>	87	87	100	Yes	<a href="#">ER</a>	88	88	100	Yes
Black or African American	4	4	100	--		4	4	100	--	
American Indian or Alaska Native	0	0		--		0	0		--	
Asian	14	14	100	--		14	14	100	--	
Filipino	6	6	100	--		6	6	100	--	
Hispanic or Latino	52	52	100	--		53	53	100	--	
Native Hawaiian or Pacific Islander	0	0		--		0	0		--	
White	10	10	100	--		10	10	100	--	
Two or More Races	1	1	100	--		1	1	100	--	
Socioeconomically Disadvantaged	39	39	100	--		39	39	100	--	
English Learners	21	21	100	--		21	21	100	--	
Students with Disabilities	3	3	100	--		3	3	100	--	

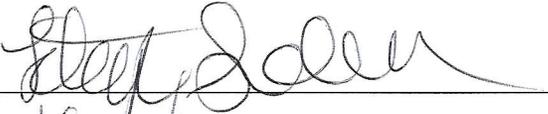
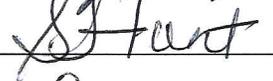
### Percent Proficient - Annual Measurable Objectives (AMOs)

GROUPS	English-Language Arts Target 88.9 % Met all percent proficient rate criteria? No					Mathematics Target 88.7 % Met all percent proficient rate criteria? No				
	Valid Scores	Number At or Above Proficient	Percent At or Above Proficient	Met 2013 AYP Criteria	Alternative Method	Valid Scores	Number At or Above Proficient	Percent At or Above Proficient	Met 2013 AYP Criteria	Alternative Method
	<b>Schoolwide</b>	84	69	82.1	No		84	67	79.8	No
Black or African American	4		--	--		4		--	--	
American Indian or Alaska Native	0		--	--		0		--	--	
Asian	14	12	85.7	--		14	14	100.0	--	
Filipino	6		--	--		6		--	--	
Hispanic or Latino	49	37	75.5	--		49	35	71.4	--	
Native Hawaiian or Pacific Islander	0		--	--		0		--	--	
White	10		--	--		10		--	--	
Two or More Races	1		--	--		1		--	--	
Socioeconomically Disadvantaged	39	31	79.5	--		39	30	76.9	--	
English Learners	21	15	71.4	--		21	18	85.7	--	
Students with Disabilities	3		--	--		3		--	--	

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

The petitioners listed below certify that they are parents meaningfully interested in enrolling their student(s) at the Growth Public Charter School. As such, petitioners believe that the charter merits consideration and hereby petition the governing board of the Sacramento City Unified School District to grant approval of the charter pursuant to Education Code 47600 et seq. The petitioners authorize the Leadership Team to negotiate any amendments to the charter necessary to secure approval by the District Board. Signature page is attached to petition upon signature.

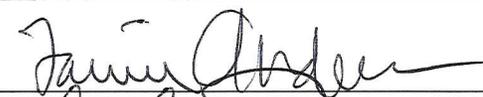
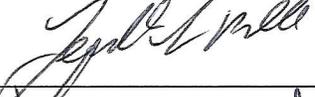
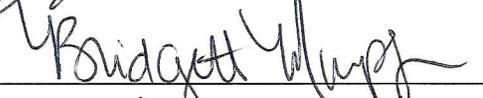
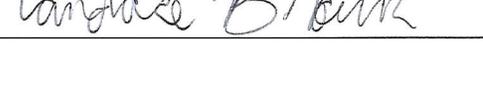
*Las personas que aquí dan su firma certifican que son padres de familia con un interés auténtico en inscribir a su(s) estudiante(s) en la Escuela Charter Growth Public School. Por lo tanto, los suscritos a esta petición afirman que ésta merece consideración y piden que la Junta Directiva Escolar del Sacramento City Unified distrito apruebe esta petición charter, según lo provee la Ley Educativa 47600 et seq. Los suscritos autorizan al Equipo Fundador de dicha escuela para negociar las enmiendas a esta petición que sean necesarias para asegurar la aprobación de la Junta Directiva Escolar. Esta página de firmas está adjunta a la petición cuando se firmó.*

	NAME <i>Nombre</i>	SIGNATURE <i>Firma</i>	PHONE NUMBER <i>número de teléfono</i>	DATE <i>Fecha</i>
1.	Lin-Hua Ou		(916) 244-1234	04/23/2016
2.	Leticia Samon		916-712-6382	4-23-16
3.	Alma Delos Santos		(916) 432-7823	4/23/16
4.	Simone Robertson		(916) 749-4855	4/23/16
5.			(209) 745-9218	4/23/16
6.	Amelia Oliveros		530 8674641	4/23/2016
7.	Tana Rodriguez		530 300-2270	4/23/2016
8.	Cindy Rogers		209-283-3096	4-23-16
9.	Sturkey Hunt		(916) 684-2397	4-23-16
10.	Angela Byron		916-308-9444	4-23-16

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

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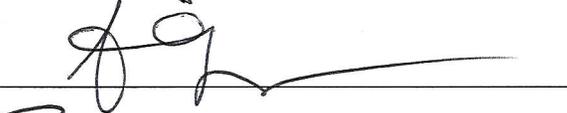
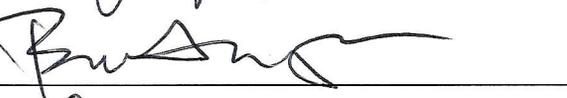
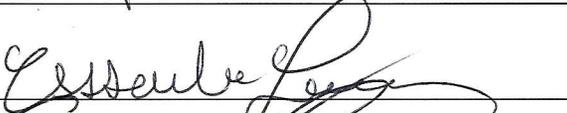
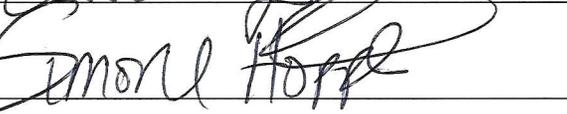
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	NAME <i>Nombre</i>	SIGNATURE <i>Firma</i>	PHONE NUMBER <i>número de teléfono</i>	DATE <i>Fecha</i>
1.	Tamie Anderson		916-622-1856	4/23/16
2.	Lakya Lome Brown		916 997 6890	4/23/16
3.	Tequilla Miller		707-208-5070	4/23/16
4.	Bridgett Murphy		530.309.9390	4.23.2016
5.	Jim Wang		greentea619 @yahoo.com	—
6.	Olessa Calpacci		okutsar@hotmail.com	4/23
7.	Diana Tate		916 904-9336	4/23/16
8.	Angelisa Silva		91647 25245	4/23/16
9.	Hardina Sepaniuk		(916) 538-8202	4/23/16
10.	Candace Brown		(530) 415-6324	4/23/16

PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL.  
*Petición para establecer la Escuela Charter Growth Public School*

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1.	Sylvia & Percy Deiwert		916-517-0398	4-23-16
2.	Tim Williams		916 549-4476	4-23-16
3.	Adrianna Gonzalez		916-606-0954	4-23-16
4.	Benjamin Amperosa		530-693-4744	4-23-16
5.	Lujana May		916-968-3617	4/23/16
6.	Cassandra Lopez		916-216-3443	4/23/16
7.	Simone Hoppe		916-602-7817	4/23/16
8.	Lanie Carren		916-897-3267	4-23-16
9.	Adrian Gonzales		916 813 1022	4-23-16
10.	Bianca Prochyl		760-504-3476	4-23-16

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**

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1.	Ciro Raymundo	Ciro Raymundo	916 710-5216	4-17-16
2.	Martin Borella	Martin B.	916-912-7887	- - - -
3.	Sandy Salinas	Sandy Salinas	(916) 893-3699	4-17-16
4.	Baltazar Silva	Baltazar	(916) 832-2502	4-17-16
5.	Maria C. Pena	Ma. Elena Pena	(916) 747-1481	4-17-16
6.	Brian Freitas	Brian Freitas	(916) 471-8982	4-20-16
7.	Elizabeth Delmon	E. Delmon	916-897-0941	4-20-16
8.	Melissa Bausby	Melissa Bausby	209-919-9099	4/20/16
9.	Andrea De la Torre	Andrea De la Torre	626 688 5093	4/20/16
10.	Grace Castillo	Grace Castillo	916 912-6231	4.20.16

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	NAME Nombre	SIGNATURE Firma	PHONE NUMBER número de teléfono	DATE Fecha
	Loisa Gorman	Loisa Gorman	916/2068568	4/17/16
1.	Maria Jaimes	Maria Jaimes	916-3205246	4/17/16
2.	Elias Custrejon	[Signature]	916-870-2821	4-17-16
3.	Jesús Poreco	Jesús Poreco	707 486 0640	4-17-16
4.	Maricela Vazquez	Maricela Vazquez	(916) 256-6814	4/17/16
5.	GISELA MARTINEZ	GISELA MARTINEZ	916/457-2405	4/17/16
6.	Maria Zavala	Maria Zavala	<del>916-320-5246</del>	4/17/16
7.	Dora Gil	Dora Gil	916 752 1649	4/17/16
8.	Gande Hernandez	Gande Hernandez	916 363 4007	4/17/16
9.	HYMA Estrada	[Signature]	916-6674540	4/17/16
10.	Charadonney Ford	Charadonney Ford	916 346 1599	4/26/16

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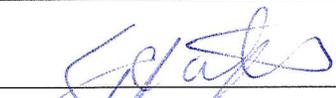
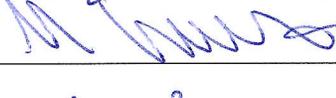
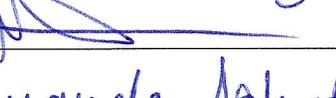
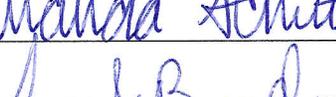
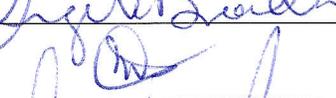
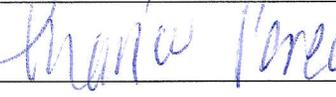
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	NAME <i>Nombre</i>	SIGNATURE <i>Firma</i>	PHONE NUMBER <i>número de teléfono</i>	DATE <i>Fecha</i>
1.	Maria Santillan		916-470-4593	04-17-16
2.	DANIEL CASTANON		(916)-870-6065	04-17-16
3.	JUAN P. MARTIN		(916) 519-6232	04-17-16
4.	Rosalinda Gonzalez		(916) 826-5361	4-17-16
5.	Dolores Sanchez	Dolores S-	(916) 470-2667	4-17-16
6.	Martha Rodriguez		916 541-43-58	4-17-16
7.	Rocio Ortega			4-17-16
8.	Angelica Sevilla	Angelica Sevilla	916) 256-8870	4-17-16
9.	Jose Garcia	Jose Garcia	707) 676-0229	4-17-16
10.	Irene Gomez	Irene Gomez	(530) 363-0115	4-17-16

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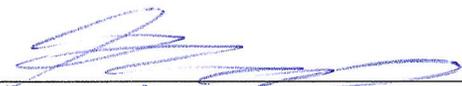
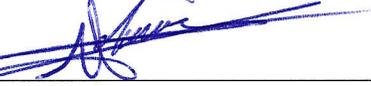
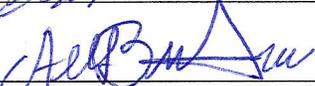
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1.	Silvia Contreras		916 342 3307	4/13/16
2.	Steve Welch		494-9155	4/13/16
3.	Ignarra Nichols		752-0240	4/13/16
4.	Margaret Voltes		752-3082	4/13/16
5.	Iola Lenz		916)544-0392	4/13/16
6.	Hayley Seibert		916 666 7555	4/13/16
7.	Amanda Schutt		916-947-0454	4/13/16
8.	Angela Braeden		(916) 576-9171	4/13/16
9.	Jennifer Abbott		(916) 712-0014	4/13/16
10.	Marivic Peregrina		(916) 877-1311	4/13/16

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

The petitioners listed below certify that they are parents meaningfully interested in enrolling their student(s) at the Growth Public Charter School. As such, petitioners believe that the charter merits consideration and hereby petition the governing board of the Sacramento City Unified School District to grant approval of the charter pursuant to Education Code 47600 et seq. The petitioners authorize the Leadership Team to negotiate any amendments to the charter necessary to secure approval by the District Board. Signature page is attached to petition upon signature.

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1.	Shawna Positer		503-810-1543	4/13/16
2.	Pegina Davis		916 996-6575	4/13/16
3.	Sonia Bustamante		(916) 369-7391	4/14/16
4.	Salomon Urizar		(916) 515 6901	04/19/16
5.	Edgar Galvez		(916) 617-6325	4-17-16
6.	Nancy Calderas	Nancy Calderas	(209) 745-3758	4-17-16
7.	Francisco Garcia	Francisco Garcia	(209) 745-3758	4/17/16
8.	Imelda Armenta	Imelda Armenta	(916) 880 0864	4/17/16
9.	<del>Alfonso Dolores</del> / 6899	<del>Alfonso Dolores</del>		4/17/16
10.	Aida Sanabria		916) 478 13 45	4/17/16

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
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Stephanie		4/20/16	9808 Peters Ranch way Elk Grove	916-753-9010			
↓	↓	↓	↓	↓	step.e.gmail.com		1
MARIA ADA		4/28/16	7447 GREENHAVEN PR # 157 SAC CA	(916) 410-2447	va@magnum.com		2
Maria Pantoja	Maria Pantoja	4-24-16	2880 Wain Ave Sacto CA 95822	(916) 427-3602	Maria.Pantoja@gmail.com		1
Jessica Hendrix		4-24-16	4432 Hazel Ave	(916) 617-1449	treefrogjess@gmail.com		2
Kristy Heathman		4/24/16	4235 36th ST	(916) 902-7750	Kristy@gnat.com	1	1
HAI NGUYEN		4/24/16	8915 GENWOOD WAY	(916) 427-2087			1
Sonia		4/24/16	470 Jessie AV	(916) 6-49-2402	-	1	3
Michelle Cromeros		4/24/16	9724 N. H. TEAK CT Sacramento	916 606-6676	-	0	2

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

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Tony Yu		4/24	5120 De Rosa dr	916 448 1888	Tyul13@gmail.com	0	2
Hannah Dorafsha		4/24	6305 Seastone Dr. SAC, 95831	925-305-0681	hannah.dorafsha@gmail.com	1	0
Candi Davis		4/24	6715 - 6th Street Rochinda	916-214-9777	Candaceann4@gmail.com	1	2
Sarah Snitovsky		4/24	1280 Olive Drive apt 243 DAVIS	715 7418481	sasnitov@gmail.com	0	0
Jane Xuan		4/24	1850 CLUB CENTER DR #1027 Sacramento	916-234-3899	Janexuanjx@gmail.com	1	0
RICARDO RAMIREZ		4/24	SUNLIGHT LANE ELK GROVE, CA 95758	916-446-2319	ramirez@gmail.com	2	1
Amanda RAMIREZ		4/24	2834 Sunlight Ln Elk Grove, CA 95758	916-446-2319	aramirez@gmail.com	2	1
Jasen Iverson		4/24	141 Alameda Cir Sacramento, CA 95834	(916) 459-0983	jiverson5@gmail.com	0	1





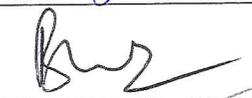
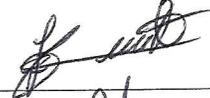
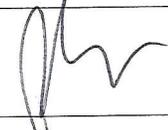




**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
***Petición para establecer la Escuela Charter Growth Public School***

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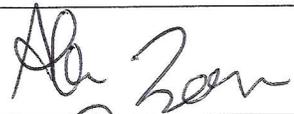
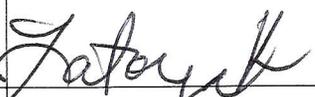
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ALBERT BRIOSO		4/30/16	340 CADILLAC DR.	916-637-9781	—	1	1
Michael Inscoe		4-30-16	3466 Dana Drive	916 544 7130	—	0	1
Tien Nguyen		4-30-16	4453 Anatolia	408-772-8902	—	1	2
Margarita Perez	Margarita Perez	4:30-16	9956 Nebula Way	916) 968-2266	—	0	1
Naga		4-30-16	10833 Folsom Blvd	916-716-7116	—	0	2
Elisa Escamilla		6-30/16	9196 Castlebow Way	916-642-5991	—	1	0
Lidia Perez		6-30/16	1986 Benita Dr Rancho Cordova	95670	—	1	1
Sean Jon		6/30/16	1545 Thurman	95670	—	2	2

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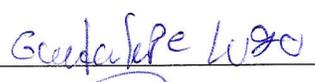
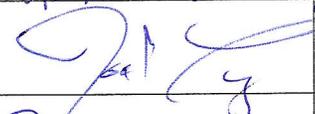
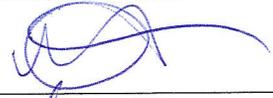
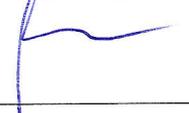
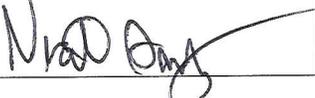
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Almaz Gashaw		April 30 2016	P.O. BOX 221606 SAC CA 95822	916-684-3821	—	0	0
Greene Green		4/30/16	4348 Granton Cir Mather, CA 95629	916-662-2454	—	2	0
Wesley Graham		04/30/16	3101 Rosemont Dr Sacramento, Ca 95826	9(209) 200 2569	—	1	0
LATOYA Ketchen Marquess Hunter	 	4/30/16 4/30/16	3521 Blue River City Sacto, CA 95834 7725 25th Street Sac: CA 95832	968 2213 822 2742	—	1	1
Shawana Richards		4/30/16	7725 25th Street Sacramento, CA 95832	(916) 271-4618	—	0	1
Donna Richard		4/30/16	10571 Milazzo Way Rancho Cordova 95670	916-655-7056	Spiritkeepers@yahoo.com	1	0
Elizabeth Graves		4/30/16	10700 Coloma Rd Rancho Cordova 95834	916 400-3617	—	1	2

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<del>Shermaine Baldwin</del>							
Shermaine Baldwin		4/30	7203 Kimwood Ln	(916) 638-5899	mayia.dre@yahoo.com	1	1
Guadalupe Lopez		4/30	2872 Caloma Dr	916) 877-0837	gllopez@ymail.com	1	0
Joel Lopez		4/30	410 BELAVE	530 788 3267	jlopez25@csus.edu	1	1
Nimish		4/30	901 Willow Bridge Folsom	916-358-2007	nihanwan@yahoo.com	1	2
Bronx		4/30	7624 E PRY SAC CA 95823	916.205.9046	jetsonCool.com	1	2
Ryan C		4/30	8729 BRAYLING WAY	(415) 205-0450	Ryan201@yahoo.com	1	1
Sudha	Sudha	4/30	209, MISSION OAK CT,	623 234 1829	Sudhashankar@outlook.com	1	1
Nick Andy		4/30	Berdy Dr	916) 410-5999	Shimringof@yahoo.com	1	3

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<del>Cecilia Martine</del>	<del>[Signature]</del>	<del>04/30/16</del>	<del>2453 Glenfane Dr. Rancho Cordova CA 95720</del>	<del>(916) 281-8221</del>			
Cecilia Martine	[Signature]	4/30/16	2453 Glenfane Dr. Rancho Cordova CA 95720	916 1281-8221		1	
Keily Smith	[Signature]	4/30/16	PO BOX 1838 Rancho Cordova CA 95841	916 220-3010		1	2
Ed Sikowski	[Signature]	4/30/16	2407 Curtis Way Sacramento	916- 248-3193		1	1
Sha Wu	[Signature]	4/30/16	9130 Kiefer Blvd. SAC.	916-850 -9589		2	1
Katharine Hammond	[Signature]	4/30/16	1704 Dionysus way RC 95742	916- 607-3917	misskaty1973@gmail.com	1	
Melody Martine	[Signature]	4/30/16	16780 Coloma Rd # 81 95670	916 869-0130	mmon.Hop@theFedp.org		
Jane Hill Hanks	[Signature]	4/30/16	3280 LAURELHURST Dr #56 95670	916 9090329		1	0
Dawnika Scherer	[Signature]	4/30/16	10855 Lucibridet Rancho Cordova	(916) 916- 3983	dscherer732@gmail		3

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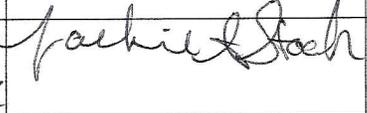
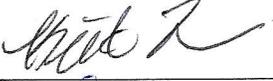
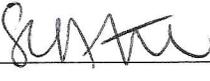
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Glaudia Gandaniga		4/30/16	_____	916 661 2836	_____	—	1
Preena Lobo		4/30/16	Re	916-582-9259	preena.deasta@gmail.com	0	1
Alanna Adams		4/30/16	492 Edison Blvd St	916-840-5326	afadams@yahoo.com	0	2
JANICE PONTI		4/30/16	7537 Whit Run Ste	916 388-626	janis@ptn	0	0
Erica Nuez		4/30/16	2280 Whistler way	916-108-5290	_____	1	1
Jan Turner		4/30/16	2653 Dawes St RC	_____	_____	0	2
Juana Cruz		4/30/16	Ran co codover 10541 Mill Acres	916 37062	_____	0	4
Leandice Vierra		4/30/16	10680 Colomard RC 95670	916.617 8195	vierracandice@yahoo.com	0	0

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Jens Maldonado			75 Pulsar Ct	316-09-35			
↓	↓	4/30	↓	↓	—	2	0
Jackie Stock		4/30	10672 Viana Ct Rancho Cordova CA 95670	916-370-2979	jackiestock2006@gmail.com	0	2
Kristi Zamperin		4/30	2208 Maxine Wy Rancho Cordova, CA	916-955-5976	kristi.iverson@gmail.com	0	1
Susannah Bayer		4/30	4342 Postwood Ct Sacramento CA 95836	916-318-1555	S.Carroll@gmail.com	0	2
Sarojini Christensen		4/30	11704 Brook Valley Rancho Cordova 95742	916-749-9015	SarojiniChristensen@gmail.com	1	1
Sally		4/30	3300 Capital Center Dr Rancho Cordova 95770	616-919-0109	Sspaul@gmail.com	0	1
Manikannan		4/20	3411 Data Drive, Rancho Cordova	9402916397	Manikannan20@gmail.com	2	0
Christopher		4/30	15410 Heek Rancho Cordova	916-5852	—		

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
***Petición para establecer la Escuela Charter Growth Public School***

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Ashley Shibayan	<i>[Signature]</i>	4/30	3325 Union Springs Way Sacramento 95827	916 539 8980	ashxeng2@gmail.com	1	1
Indu Vasisth	<i>[Signature]</i>	4/30	3546 Blanchette Way Rancho Cordova	916 858 1664	—	1	1
Yolanda Castro	<i>[Signature]</i>	4/30	2091 West La Loma Rancho Cordova	916 329 2215	yulayla@gmail.com	1	1
CHRISTINA AGUILAR	<i>[Signature]</i>	4/30	11749 MANICIR R. CORDOVA	559-474-0900	m.s. Aguilars.c@yahoo.com	1	0
Erica Murphy	<i>[Signature]</i>	4/30	2101 West La Loma Dr. Rancho	916-298-4809	erica.williams2@gmail.com	2	1
Rebecca Gora	<i>[Signature]</i>	4/30	2330 Vehicle Demino	916 920 4587	—	1	2
Maria Atejo	<i>[Signature]</i>	4/30	16880 Coloma Rd Rancho Cordova	916 969-3908	—	0	2
Rachel [unclear]	<i>[Signature]</i>	4/30	10412 S. White Rd Rancho	916 446 9263	—	1	0

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Yvonne Gonzalez		04/30/16	108 Sierra St, Woodlawn	(530) 867-6075	rogue249@yahoo.com	0	0
Stephanie Asay		4/30/16	2188 McGregor Dr	916-600-8006	melonymama@yahoo.com	2	2
Grayson		4/30/16	11864 Village Parkway	916 888 1579	chalb-gayete	1	
Yenna Scott		4/30/16	9274 Franklin Blvd #175	916-919-6519	scottfamily125@yahoo.com		1
Alex Berovskich		4/30/16	2318-F Sierra Madre Ct. R.C.	916-912-5882		1	1
Virginia Villalba		4/30/16	2423 Stakewood Rancho Corcoran	916 534-5285	kullba@intnet.com	1	1
Tracie Porter		4/30/16		916 947-7416		1	1
Rhed Proenig		4/30/16	10438 Colomer Rd 34 Rancho Corcoran	7698963		2	1

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KARTHIKEYAN DHANDAPANI		04/30/16	4500 TRUKEL RD 95834	425-974 -0132	Karthikeyan dhandapani@gmail.com	0	1
Tack OROSJOL		4/30/16	3414 LEXIA CT	916-416-4526	slorol5126 yahoo.com	0	2
Ashlei Smith		4/30/16	10076 Nevada way 95827	916-839 1263	Nshaboo hotmail.com	1	0
MAELISSA CARMACHO		4/30/16	2644 Benny Way	916-585 2192	NA	1	0
Jeanina Kalavara		4/30/16	3637 Faberge Way	916 508 - 2229	Jlokalavaras hotmail.com	1	2
Tiffany Puech		4/30/16	9800 Anetha R St, CA 95827		thoneque att.net	1	2
Monica Puelo		4/30/16	2511 Betsy way Rancho Cordova CA 95670	(916)521-4716	monica.puelo21 @gmail.com	1	2
Mari Lu Magaña		4/30/11	1643 Sierra Garden Tr Apt Roseville CA 95661	(916)904-2023	guzman33@yahoo.com	1	

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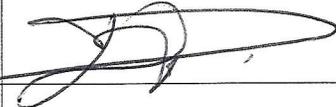
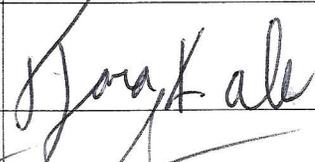
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Shenka 72622		4/30/16		909-262 3346	RUT4580 @hotmail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gina Kane		4/30/16		916.548. 7765	ginamkane @yahoo.com	1	
<del>TERESA Gutierrez</del>	<del></del>	4/30	Sacto	775-6311	—	<input checked="" type="checkbox"/>	
Vandana		4/30	Sacramento	3079165	vandana .w@gmail.com	1	
Emily		4/30	Elk Grove		emilya@hotmail.com	3	
Ray 5858		4/30	POCSOM	4053986370	Ray.5858@ yosoo.com	0	1
<del>TERESA Gutierrez</del>	<del></del>	4/30	Sacto	9165937147	75@gmail.	<input checked="" type="checkbox"/>	
Christina Soechan		4/30	Sue	916872861			

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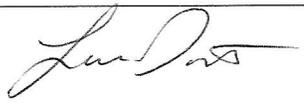
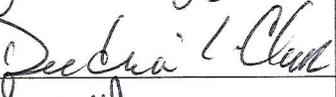
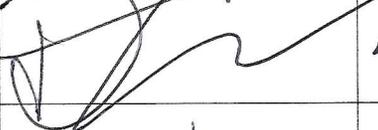
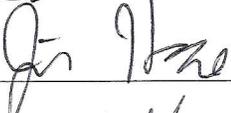
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Kettle, Samantha		4/23/16	615 E. Ranch Rd Sacramento CA 95821	916 606 8949	Samantha.kettle@gmail.com	1	1
Juanandres Camargo		4/29/16	3952 Tricici Way CA North Highlands	916-33510-25		1	
Deryl Greene		4/24/16	1350 Broadstone <sup>95660</sup> #3311 Folsom, CA 95630	916-577-8869	callejasd@gmail.com	1	
Heathes Batterson		4/29/16	5035 63rd St Sac CA 95820	916 346 5249	Kiyasysman@yahoo.com		1
Rienna Herrera		4/24/16	601 Cannery Ave Sac. CA 95811	916) 753 8438	Rherreraz227@gmail.com		1
GENE ZHAUVEZ		4-24-16	1037 FAIRWEATHER DR. SA CA 95833	916-922-1617		1	0
Tara Olson		4.24.16	1515 Vaidorn St #300 Davis, CA 95618	(530) 554-5346		2	1
Aaron Knight		4/24/16	6632 Stanley Ave Carmichael Ca 95608	(916) 267-4497		3	2

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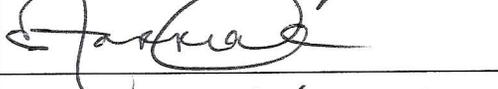
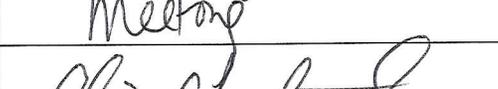
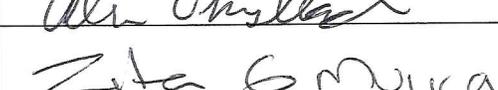
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Laura Drath		4/23/16	11083 Buffalo River Ct Rancho 95670	916-946-2268	laura.drath@yahoo.com	1	1
Paulina Galan		04/23/16	<del>4802 Deded</del> 1346 Hidalgo Cir. Roseville CA	(916) 749-2160	paugalan@hotmail.com	1	1
Aurora Rodriguez		4/23/16	7735 Laramore Way Sacramento Ca 95832	(916) 501-2595	arodriguez@hotmail.com	2	2
Dee Clark		4/24/16	250 Del Norte Ct #5 Sacramento Ca	(916) 996-6277	dclarkpapercraft.com	1	2
Sarah Therrell		4/24/16	2104 Crome Ct Sac. Ca. 95825	(916) 640-3608	SarahMSoto@yahoo.com	1	1
Denise Crivello		4/24/16	410 #29 Sacramento CA	(925) 470-5014	Crivello@yahoo	1	1
Jim Mage		4-24	7236 Greenhaven Dr Sac. Ca 95831	(916) 798-2977	DVDHSL@aol.com	1	1
LUSINE SCHARF		4-24	7110 SNOWY BERRY WAY Sacramento CA 95825	(916) 599-1157		2	0

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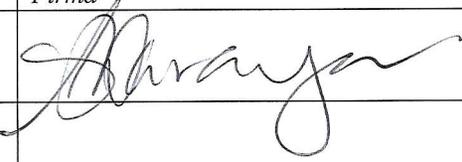
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1.	Erica Clayton		559-917-7028	4/21/16
2.	Aldina Ferreira		428-3883	4-21-16
3.	Thomas Lewandowski		545-2248	4-21-16
4.	Siena Albright		9	4/23/16
5.	Marria Cha		916-302-6414	4/23/16
6.	Harold Holch		916 613 3114	4/23/16
7.	Mae King		916-813-8976	4/23/16
8.	Mee Fong		916-671-0845	4/23/16
9.	Alison Orsted		619-381-3804	4/23/16
10.	Zita Mojica		971 226 5182	4/23/16

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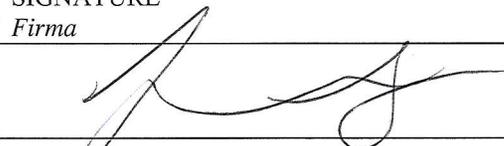
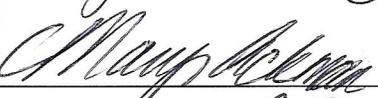
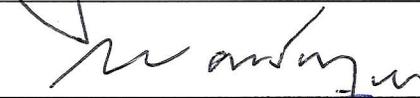
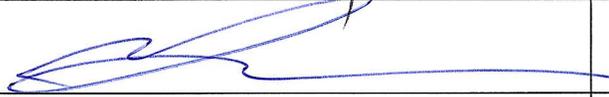
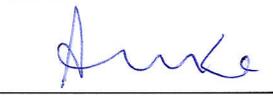
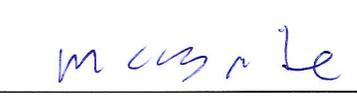
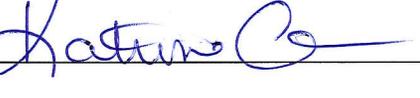
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1.	Arbi Narayan		(916) 889-9558	4/23/16
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

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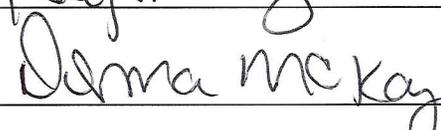
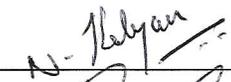
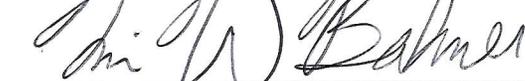
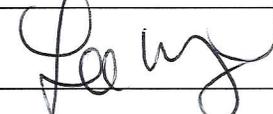
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1.	Camrancel ver		210 980 3721	4/30
2.	Mary Ackman		916-813-7230	4/30/16
3.	Jotto RICE		916-955-9803	4/30/16
4.	Aharind		916-458-6216	4/30/16
5.	R. Myers		916 2074276	4/30/16
6.	Sanjana		9168024049	
7.	Carol		9	4/30/16
8.	Misera Brennan		916 362-5045	4/30/16
9.	Katrina Caruso		544-1115	4/30/16
10.				

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**

*Petición para establecer la Escuela Charter Growth Public School*

The petitioners listed below certify that they are parents meaningfully interested in enrolling their student(s) at the Growth Public Charter School. As such, petitioners believe that the charter merits consideration and hereby petition the governing board of the Sacramento City Unified School District to grant approval of the charter pursuant to Education Code 47600 et seq. The petitioners authorize the Leadership Team to negotiate any amendments to the charter necessary to secure approval by the District Board. Signature page is attached to petition upon signature.

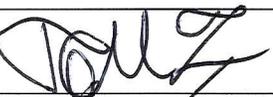
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	NAME <i>Nombre</i>	SIGNATURE <i>Firma</i>	PHONE NUMBER <i>número de teléfono</i>	DATE <i>Fecha</i>
1.	Deepti Vyas		765-490-7698	4/23/16
2.	FEROZA BUKSH		371-1210	4/23/16
3.	Abby Smithers		(916) 662-7658	4/23/16
4.	Kayta Yang		916-738-5781	4/23/16
5.	Donna McKay		916-704-1560	4/23/16
6.	KALYAN		916-701-5100	4/23/16
7.	Tim Balmer		916 621 9125	4/23/16
8.	Gloria Obando		(209) 409-4443	4/23/16
9.	Lee V. Yang		916-642-3915	4/23/16
10.				

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*Petición para establecer la Escuela Charter Growth Public School*

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	NAME Nombre	SIGNATURE Firma	PHONE NUMBER número de teléfono	DATE Fecha
1.	Agnes Ng		415-799-1984	4/23/2016
2.	Katherine Skonpksi		215 568 5046	4/23/16
3.	Diana Gallagher		650-630-6004	4/23/16
4.	Shirley L. Macias		(914) 391-3365	23 April 16
5.	Mam Hsu		(916) 359-6689	23 Apr 2016
6.	DORIS SAHVI		9164253055	4/23/16
7.	Cindy BARTON		321628728	4/23/16
8.	Tetyana Labella		(909) 204-0000	4-23-16
9.	Amanda Zedeiro		(916) 949-2728	4-23-16
10.	Chereka Williams		718-512-8091	4/23/16

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

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1.	Grisa Mora	Grisa Mora	916) 706 4162	4/23/16
2.	Ben Lopez	BENJAMIN Lopez	916) 761-2048	4-23-16
3.	Avery White	Avery White	(916) 505-1251	4/23/16
4.	Jeanne Walpole	Jeanne Walpole	(916) 544-9610	4-23-16
5.	Debra Tate	Debra Tate	415 684 2371	4-23-16
6.	Moung Saechao	Moung Saechao	261-8048	4/23/16
7.	Asiyah Jama	Asiyah Jama		4/23/16
8.	Erika	Erika	877-1717	4/23/16
9.	Christopher Finamore	Christopher Finamore	916 832 1723	
10.	Minda Dimaano	Minda Dimaano	916 521-1966	4/23/2016

PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL

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1.	Danny Saucedo		916 216-5019	4/24/14
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1.	Candice McDonough	Candice McDonough	916-807-9681	4-23-16
2.	Jennie Zapata	Jennie Zapata	916 893-2187	4-23-16
3.	Rebecca Ferncombs	Rebecca Ferncombs	(916) 964 0710	4-23-16
4.	Kayla Johnson	Kayla Johnson	(415) 755-7786	4-23-16
5.	Sehesh Ahmad	Sehesh Ahmad	916-719-8987	
6.	Melissa Gonzalez	Melissa Gonzalez	916 494 9824	4/23/16
7.	Kim Wells	Kim Wells	916 771 16565	4/23/16
8.	Angel Garcia	Angel Garcia	716 392 4069	4/23/16
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	NAME Nombre	SIGNATURE Firma	PHONE NUMBER número de teléfono	DATE Fecha
1.	Lorena Torres	Lorena Torres	916) 370-0382	April 23
2.	Judy Hendrix	Judy Hendrix	916- 333-9127	4-23-16
3.	Aubrielle Hubbard	Aubrielle Hubbard	(916) 334-4764	4-23-16
4.	Adolfo Rodriguez	Adolfo Rodriguez	(916) 372 1632	4-23-16
5.	Margarita Chavez	Margarita Chavez	(916) 895-9133	4-24-16
6.	Guadalupe Cisneros	<del>Guadalupe Cisneros</del>	916) 429-0128	4-23-16
7.	Darangelita Johnson	Darangelita Johnson	916- 893-1147	4-24-16
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1.	Linda Holderness <i>Linda Holderness</i>	<i>Linda Holderness</i>		4/30/16
2.	Alan Feuerwerker	<i>Alan Feuerwerker</i>	916 852 8017	4/30/16
3.	Tasheena Fergill	<i>Tasheena Fergill</i>	916 826-7151	4/30/16
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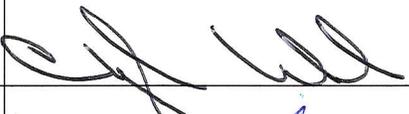
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1.	Ursula Bigler	Ursula Bigler	916-417-2111	4-30-16
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1.	Cheryl White		(916) 447-8756	4-24-16
2.	Margaret Blue		(916) 285-5494	4-24-16
3.	Jan Daley		209 430 8825	4-24-16
4.	Amanda Tyll		(916) 695-9597	4-24-16
5.	Kayla Salazar		916-333-9417	4-24-16
6.	Roshni Pareto		916) 698 6914	4-24-16
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Lakshman Yarran shetty		05/14/16	3300 CAPITAL CENTER DR #50 RANCHO CORDOVA CA 95770	708-822-8340	LAKSHMAN79@Yahoo.com	1	
Silver Leblanc		5/14/16	10421 El mercado DR - Unit A	548-0014	Silverrhoe77@gmail.com		2
Vaana Vadapalli		5/14/16			Vaana.vada.palli@gmail.com	1	
Margaret Herbert		5/14/16	3329 Hartselle WY Sacto, ca 95827	9162912445	rosier07@yahoo.com	1	0
CHASMIN STOKES		5/14/16	3572 Maddiewood Sacramento CA 95821	951 992 7968	STOKESCHASMIN@gmail.com	1	1
RANDY CARANO		5/14/16	3101 FEDERALIST LN. SACRAMENTO 95827	928-651-5836	rgoke@hotmail.com		1
FERENI TANA		5/14/16	3441 DATA DR #484 RANCHO CORDOVA 95770	(951)345-2284	fereni7@gmail.com	1	1
SARA SILVER		5-11-16	2664 La Loma DR #57 Rancho Cordova CA 95770	916-752-8433	SaraSilver101@yahoo.com	1	1

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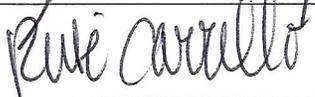
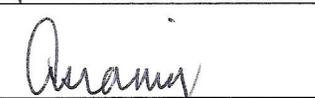
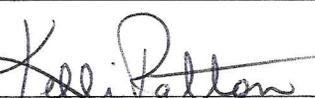
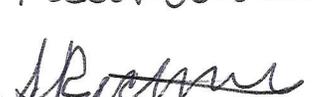
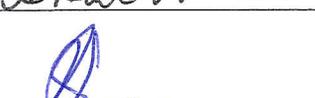
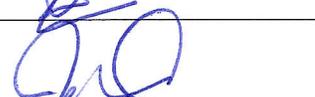
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Keta Shah	<i>Keta</i>	05/14/16	Keta.Shah@yahoo.com			1	
Shash	<i>Shash</i>	"	shashigs@gmail.com			0	
Jennifer Kofnoor	<i>Jennifer</i>	"	jollyraketeer@yahoo.com			1	
Raymond Cafe	<i>Raymond Cafe</i>	14	raycafe@rocketmail.com	916-958-0763		1	
Rebecca McClenahan	<i>R. McClenahan</i>	5/14/16	2678 Barbera way Rancho Cordova, CA 95670			1	
Andy Kopac	<i>Andy Kopac</i>	5/14/16	8408 Ranchita way Fair Oaks, CA 95628	650 619-6760	ADKopac@gmail.com	0	0
Grant McClenahan	<i>Grant McClenahan</i>	5/14/2016	2678 Barbera way Rancho Cordova, CA 95670	916 753-8207	G1MCCLE@YAHOO.COM	1	2
Maura Garcia	<i>Maura</i>	5/14/16	maura.momino@yaho.com			4	1

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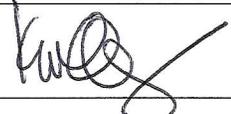
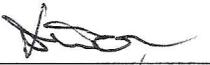
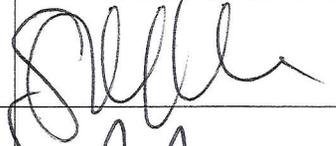
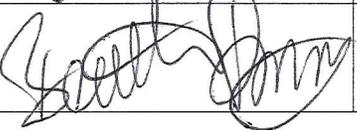
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James Carey		5/14	9347 Boscaste way Sac CA 95828	916 756-5288	JamesCarey@gmail.com	1	1
Rubi Camillo		5/14	3147 Puschall Ct Rancho Cordova 95670	916-917-5721	rubi.camillo@gmail.com	1	0
Annaly Ramiro		5/14	1574 Klamath River Rancho Cordova, CA	916-802-7078	NA	1	0
Ramesh ch		5/14				1	
Kelli Patton		5/14	9381 Snowbird way Sacramento 95826	916-369-8720	-	1	
Stacie Richards		5/14	" "	916-369-8720	-	1	0
Gayatri		5/14	11743 Village Road Wendy	916-214-1567			
JASON NOAC		5/14	2558 VIRNACCIA CIR RANCHO CORDOVA	773 904 4500		1	

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
*Petición para establecer la Escuela Charter Growth Public School*

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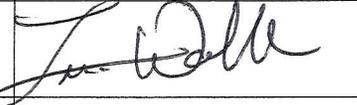
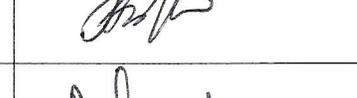
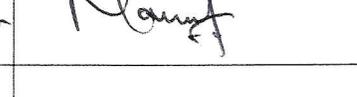
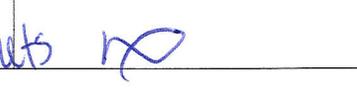
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Spencer Greenlee		5/14/16	11870 Herodian Dr Rancho Cordov				
↓	↓	↓	95742	916 226-0288	Spencergreenlee@gmail.com		1
<del>Leah Geckler</del>	<del></del>						
Leah Geckler		5/14	6617 Lund's Ave Carmichael	916 483-6389			1
Karlex Barrios		5/14/16	2410 Village Parkway	(310) 940-1952			
Smith		5/15/16		916 698-5511			
GABRIEL DINCA		5/15/16	1961 KLAMATH RIVER DR RANCHO CORDOVA, CA, 95670	916 220-4526		2	1
Sidrah Khan		5/15/16	2504 Pleasant Hollow Dr.	call 670-6014		1	1
M. Chu		5/14/16	3333 Cris Dr.	988.9310			
Benito Jimas		5/14/16	3117 Eades Way RC 95670		b_djmas@worldnet.com	1	1

Comm

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
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ANDREW CRAVEN		5/14/16	MATIER, CA 95655	(916) 369-0845	andrewc@pacbell.net	2	
LISA WAFFLE		5.14.16	Rancho Cordova	831 622 0911	lisawaffle@gmail.com	0	
Traci Echevarry		5.14.16	Rancho Cordova	914 893 1546	lillikay216@gmail.com	0	
Dignity		5.19.16	Rodlin, CA	888 531 3722	dignity@comcast.net	1	1
Ravi Alzabadi		5/14/16	Rancho Cordova	916 370 8042	ravifkz@gmail.com		
Alex Borovskikh		5/14/16	Rancho Cordova	916 912 5882	alborovskikh@gmail.com	1	
Manivannan		"	Rancho Cordova	916 391 6377	kinanivanman@gmail.com	2	
NATASHA Dubirets		5/14/16	Rancho-Cordova	916 832-0769	dubirets@hotmail.com	1	

**PETITION FOR THE ESTABLISHMENT OF GROWTH PUBLIC SCHOOL CHARTER SCHOOL**

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Sarah Luzano		5/14/16	Nather 4280 Aubergine Wy.	(916) 508-1822	msted105@ hotmail.com	2	
ANT ESQUERRA		5/14/16	9117 CASTLEBAR WAY S 95826	916 9522396	ANTHONY_ESQUERRA @YAHOO	0	0
Diana Esquerria		5/14/16	"	"	"	0	0
Saman		5/14/16	2390 Glen Ellen Cir Apt # 4 Sacramento, Ca 95832	916-256-9196		1	
Phyllis		5/14/16	2740 Tiff West way 95827	317.506.9647	psily6673p gmail.com	0	0
Sam		5/14	10105 NADA CT SACTO.CA	916-300-7452		0	0
Elizabeth Valles		5/14	2163 DANBURY RC 95630	530-966-2947	Lizandade@ hotmail.com	1	1
Carimi		5/14	3441 Dana Wy RC 95630	916 222 6728	mlaxmi_601 @yahoo.com	01	

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Sid Chi		5/14/16	Eregra		Sid200@yahoo.com		3
Liza Yan		5/14/14	Carmichael	916 532 6119	lize587@ gmail.com	1	1
Pang Li		5/14/16	Rancho Cordova	916 585-3817	pangal984@yahoo.com	1	
Leticia Mirelez Wang		5/14/16	Sac downfaw	916 968 7294	Leticia mirelez wang@ gmail. com	0	2
Cindy Blum		5/14	Folsom			1	2
LIANE RAMIREZ		5/14/16	1410 EL TEJON NY SAC CA 95864	916 481-7498	ramirezliane 2@gmail.com	1	0
Suzanne Peirce		5/14/16	Natomas 95833		Oct252@ com	1	1
Corazon Kukulurati		5/14/16	Sacramento		azonak23@gmail.com	2	2

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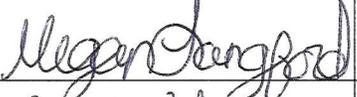
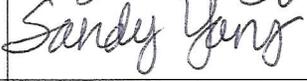
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Hannah Robinson		5/14/16	9908 Nebula Way Sac 95827	916/369-8823	froggie04@hotmail.com	0	1
Sangita Anu		5/14/16	4058 Glen Springs Way 95742	916/557-0778	SangitaAnu@gmail.com	2	2
Vanessa Singh		5/14/2016	12023 Country Gardens Rd KC CA 95742	916 241-9778	VanSingh@gmail.com	2	1
Marcele		5/14/2016	1961 Klamath River	916 798 0884	marcelledines@yahoo.com	2	2
JAKE DINES		5/14/2016	4029 Branigan Lake Way Rancho Cordova CA 95742	916 215 0291	JAKE DINES@gmail.com	0	2
Alma Buckner		5/14/16	10925 Tamar Post				
Rebecca AKROYD		5/14/16	3621 HUSCH way Rancho Cordova 95670	916 955 0849	rebeccaakroyd@gmail.com	1	0
Sarah Bontrager		5/14/16	95670			1	1

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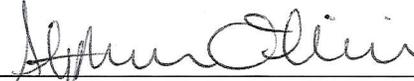
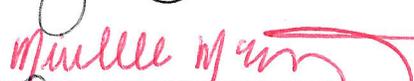
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RADOSTINA PETKOVA		05/14/16	430 Coventry Ct Folsom	—	—	—	—
Sandy Matos		5/14/16	12269 Canyonlands Dr. Rancho Cordova 95742			1	2
Gulbenkian Urarte		5/14/16	2811 Norwood Cir Sacramento CA			3	2
Megan Langford		5/14/16	3342 Boutier rd Sacramento 95827				
Sandy Yang		5/14/16	3124 Bridgeway Dr Rancho Cordova 95670	(916) 307-9122		1	1
Erick Estrada				—	—		
Eli Alvarez		5/14/16	1140 Congress ave	—	—		
Angela Ryan		5-14-16	2915 Dainle Rancho, 95670	916 308-9444		1	1

**GROWTH PUBLIC SCHOOL CHARTER SCHOOL**  
**Signatures of meaningfully interested teachers**

**Total number of teachers estimated to be employed at the school during the first year of operation: 5**

**We agree to the charter petition and our signature indicates that we are meaningfully interested in teaching at the charter school.**

	NAME <i>Nombre</i>	SIGNATURE <i>Firma</i>	PHONE NUMBER <i>número de teléfono</i>	DATE <i>Fecha</i>	Type of Credential <i>Held</i>
1.	Margaret West		(916) 243-5722	8/15/16	Prelim MS
2.	Camillio Brandi		707.450.5977	4/16/16	Prelim
3.	Stephanie Oliveri		(909) 957-2680	4/16/16	Prelim MS
4.	Rachael Fulk		(530) 400-5148	4/16/16	<del>Prelim</del> Intern
5.	Mimi Giese		530 919 2066	4/16/16	Intern
6.	Yanelly Marin		(323) 884- 7216	4/16/16	Intern
7.	Michelle McCarthy		949-207- 8179	4/16/16	Prelim Credential
8.	April Mahoney		(914) 396-7087	4/16/16	Elementary
9.	Virginia Shedd		269-998- 2455	4/24/16	6-12
10.					

**CompetencyWorks** ISSUE BRIEF

# Implementing Competency Education in K–12 Systems:

*Insights from Local Leaders*

WRITTEN BY:  
Chris Sturgis

*June 2015*

## About CompetencyWorks

CompetencyWorks is a collaborative initiative drawing on the knowledge of its partners and advisory board. The International Association for K–12 Online Learning (iNACOL) is the lead organization with project management facilitated by MetisNet. We are deeply grateful for the leadership and support from the partner organizations American Youth Policy Forum, Jobs for the Future, and the National Governors Association. Their vision and creative partnership have been instrumental in the development of CompetencyWorks.



For more information on competency education, you can visit [CompetencyWorks](#), read previous issue briefs on the topic, or visit the [Competency-Based Pathways wiki](#) for an in-depth look at the working definition.

This report is based on research funded in part by the Carnegie Corporation of New York, the Nellie Mae Education Foundation, and the Bill & Melinda Gates Foundation. The findings and conclusions contained within are those of the author Chris Sturgis and do not necessarily reflect positions or policies of the funders.

BILL & MELINDA  
GATES foundation

Carnegie  
CORPORATION  
OF NEW YORK

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EDUCATION  
FOUNDATION



Please refer to this paper as Sturgis, C., *Implementing Competency Education in K–12 Systems: Insights from Local Leaders*, International Association for K–12 Online Learning, 2015. Content in this report is licensed under a Creative Commons Attribution 4.0 International license.



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## Acknowledgments

Over the past five years, I have had the opportunity to visit competency-based districts and schools all across our country and engage in powerfully insightful conversations with the extraordinary educators leading these schools. They have opened their doors, dedicated time to respond to my steady stream of questions, and participated in ongoing conversations about competency education by phone and email. In addition, several have begun a public dialogue by sharing their insights on CompetencyWorks. The knowledge that teachers and leaders in competency-based districts have developed on the limitations of the traditional time-based system; on engaging, motivating, and teaching students; on student agency and embedded professional development; on instruction and assessment; and on distributed leadership is absolutely humbling and inspiring. I have done my best to capture their insights, knowing that every point raised is only the gateway to a much deeper discussion.

There are several districts that have been incredibly helpful in sharing their learning. I will take this opportunity to thank three that stand out in this regard. Most recently, I had the opportunity to visit Chugach School District. Given that they are the district to have been operating a performance-based system the longest, they had extensive learnings to share, and their voice can be heard throughout the paper. Having visited and worked with the team from Lindsay Unified School District several times, I can testify that their commitment to their learners is equaled by a commitment to share their experiences. Finally, thanks to the Sanborn Regional School District for communicating extensively with their peers through CompetencyWorks, sharing their findings and highlighting their lessons learned about unanticipated consequences.

I want to thank a number of people specifically for their support and feedback in the development of this paper, including Brian Blake, John Branam, Jane Bryson, Kim Carter, Tobi Chassie, Harvey Chism, Julia Freeland, Virgel Hammonds, Ellen Hume-Howard, Rebecca Midles, Doug Penn, Jaime Robles, Tom Rooney, Rick Schreiber, Don Siviski, Diane Smith, Brian Stack, Charlie Toulmin, Debbie Treece, Jonathan Vander Els, and Bill Zima. A special thanks to William Bryan for taking the time to provide a tutorial on leadership. There are countless others from around the country who have informed the ideas here—students, educators, principals, district staff, superintendents, school board members, state policy leaders, and technical assistance providers. I am grateful for all they have shared with me about their vision, their work, and their personal commitment to doing what is best for kids.

Four people need special recognition. Bob Crumley from Chugach School District was generous with his suggestions on how to strengthen the paper and offered many concrete examples of lessons learned. Susan Patrick, President of iNACOL and co-founder of CompetencyWorks, continues to provide extraordinary leadership in advancing competency education. I am so grateful for our collaboration. Natalie Abel, project manager for CompetencyWorks, with her bright and shiny set of skills, brought this paper to completion. A special thanks to Tamara Berry for her exceptional copyediting and guidance throughout every step of the development of the paper. In closing, let's all give a round of applause for the team at Nellie Mae Education Foundation for their courage, creativity, and vision.

### **Chris Sturgis**

*Principal of MetisNet, Co-Founder of CompetencyWorks*  
May 2015

# IMPLEMENTING COMPETENCY EDUCATION IN K-12 SYSTEMS: INSIGHTS FROM LOCAL LEADERS

## I. Introduction

---

*In order to truly transform education from an industrial-age model to a model of system-wide empowerment, organizations must be willing to go beyond second order change. They must be willing to remove and replace the status quo with a learning-centered culture of innovation and ownership. In doing so, leaders should expect some things to seem practically impossible... yet in the face of the impossible, leaders should never waiver from their strong beliefs and must always adhere to a future-focused mindset. The transformation of America's schools will require courageous leaders who can transform ambiguity and dissent into empowerment and commitment...our kids deserve nothing less.*

– Tom Rooney, Superintendent, Lindsay Unified School District

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Competency education, an educator-led reform, is taking root in schools and districts across the country. In some states, state leadership has cleared the path with policies to advance competency education. However, districts in Alaska, Arkansas, California, Florida, Georgia, Illinois, and South Carolina are transitioning to competency education with little or no supporting policy. Furthermore, innovative school models are popping up all over the United States, contributing to our knowledge of new ways to organize teaching and learning within a competency-based structure.

Nearly 90 percent of states have created some room for competency-based innovations. The leading states of New Hampshire, Maine, Vermont, and Colorado have started down the path to redesign personalized, competency-based policies and education by re-aligning their systems, creating proficiency-based diplomas, and converting credits to recognize skills learned rather than time in class. Arizona, Connecticut, Iowa, Kentucky, Ohio, Oregon, and Rhode Island have all established enabling policies to create space for districts to innovate.



You can learn more about competency education at [CompetencyWorks.org](https://www.competencyworks.org), as well as find links and materials for all the resources mentioned in this paper on the [CompetencyWorks wiki](https://www.competencyworks.org/wiki).



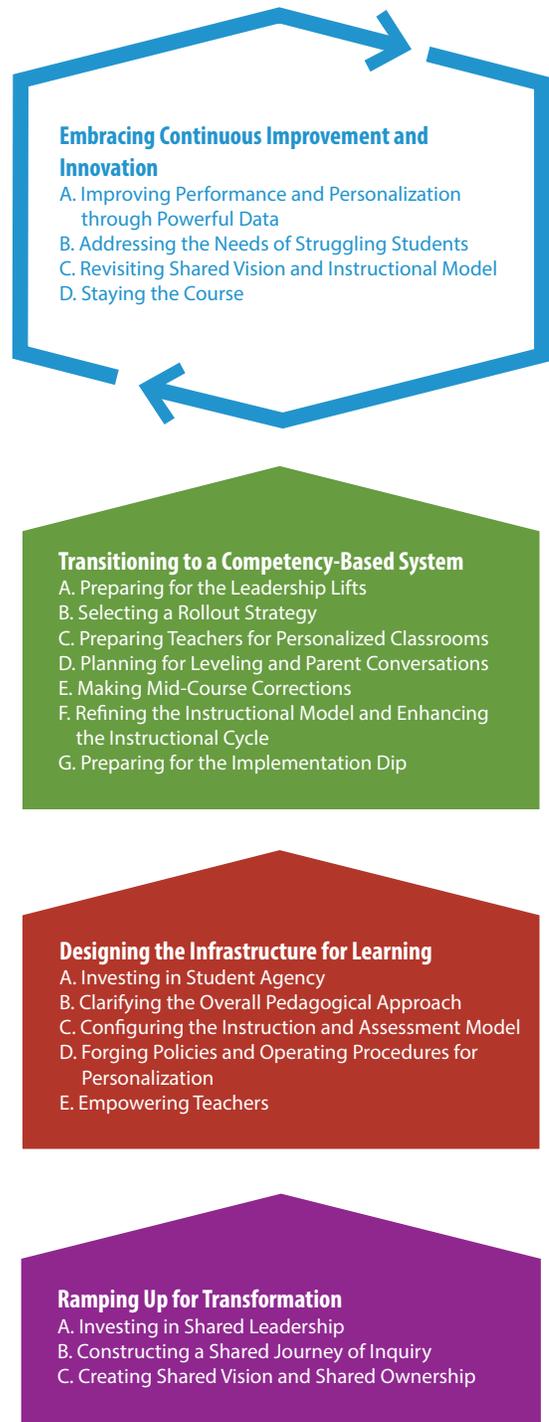
This paper seeks to map out the terrain of the district implementation strategies being used to convert traditional systems into personalized, competency-based ones.<sup>1</sup> Although not a detailed guide, the hope is that the discussion offered here will prepare you to begin the transformational process. Four stages of implementation are proposed in this paper: 1) Ramping Up for Transformation, 2) Designing the Infrastructure for Learning, 3) Transitioning to a Competency-Based System, and 4) Embracing Continuous Improvement and Innovation. Schools and their district offices work in partnership during this transformation, which means implementation issues at both levels will be discussed.

The findings in this paper are based on interviews and site visits conducted over the past five years as well as the knowledge shared by leaders in the field at CompetencyWorks. Because the field of competency education is relatively new, there are no comprehensive evaluations to help us identify promising practices. However, throughout this paper, we will highlight issues related to quality and equity that have been raised by those leading the way. These districts have been operating competency-based systems from anywhere between three and twenty years. Their timelines to making the transition from time-based to competency-based have varied depending on where they started, the urgency for change, and the time needed to lay the groundwork with their communities and educators. In general, most recommend anticipating the process of moving through the first three stages at a minimum of five years. All the districts highlighted here emphasize they are still involved in continually improving the design and implementation of the system.

As you read the insights from leaders offered in this paper, it is important to remember that the districts showcased here represent just a handful of all the districts converting to competency education. There are a hundred or more districts in the leading states that have begun the journey to competency education. They are true educational leaders willing to move beyond the traditional, time-based system to create a new system that ensures students learn what is needed to be successful in the next step of their lives.

<sup>1</sup> States and districts use a variety of terms to discuss competency-based education, including proficiency-based, mastery-based, and performance-based. These terms may also be used to describe online learning. In this paper, we will use the term **competency education** to refer to the system-wide and/or school-wide structures.

## Exhibit 2: Stages of Implementation



## ii. What Is Competency Education?

During the last year, the phrase competency education has come into vogue. You may have heard it being used to refer to self-paced online learning or to describe innovations in higher education. This paper is focused on the transformation of the time-based K–12 system where the focus is on inputs (seat-time, hours in the day, minutes in each class) to a system where the focus is on learning.

### A. Understanding Competency Education

The power of competency education is in its system-wide infrastructure that creates the necessary feedback loops to ensure students are learning. The five-part working definition of competency education describes the elements that need to be put into place to re-engineer the education system to reliably produce student learning:

- Students advance upon demonstrated mastery;
- Competencies include explicit, measurable, transferable learning objectives that empower students;
- Assessment is meaningful and a positive learning experience for students;
- Students receive timely, differentiated support based on their individual learning needs; and
- Learning outcomes emphasize competencies that include application and creation of knowledge, along with the development of important skills and dispositions.

Competency education is often described with the phrase, “Learning is constant, and time is the variable.” We know that students learn differently, requiring more or less time for different reasons. They may be at different

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**Learning is  
measured  
by mastery.**



points along the learning continuum, each with a different set of skills.<sup>ii</sup> Students may have different approaches to learning, with some students preferring to take more time upfront to dive more deeply into learning to master new skills or content. Certainly the levels of academic support available outside of school differ. All of these dynamics lead to students learning at different paces. However, flexible pacing, or the concept that “students advance upon mastery,” is only one of the five elements of the definition. In competency education, timely, differentiated support is equally important, as that is what allows students to continue progressing without being left behind. Teachers work with students to ensure they are filling any gaps in foundational skills, and schools provide timely support so students can get immediate help when they are struggling.

The traditional system produces gaps in learning because it is established around a time-based Carnegie Unit credit that guarantees a minimal exposure to content without a guarantee of learning.<sup>3</sup> In combination with an A–F grading system—which can be easily corrupted as a measure of learning by providing points for behavior, allowing for measurements based on assignments instead of learning, and masking student progress through the averaging of grades—accountability for learning is eroded. The accountability policies developed under No Child Left Behind have exposed the achievement gaps in this system, but are unable to lead to its elimination because of the inherent flaws in the time-based system. In competency education, the key to improving achievement for underserved student populations—racial/ethnic, language, income, and special education needs—depends on several factors and elements that keep equity at the core. These include: making learning expectations and the process of determining proficiency transparent; supporting students to build the habits of learning they need to be lifelong learners; monitoring student progress and pace to ensure the school is being responsive to student needs while also informing the professional development of teachers; and upholding strong continuous improvement efforts. In this way, accountability is embedded into the system itself.

We encourage you to take the time to look at the [detailed definition](#) available at the CompetencyWorks Wiki. [CompetencyWorks.org](#) also has a list of [recommended reading](#) and posts designed to help understand competency education.<sup>4</sup>

## B. Why Do Educators Turn to Competency Education?

There are many reasons districts and communities turn to competency education: an economy where post-secondary education and training is needed to get on a career path to a family-wage job; a global economy expanding the playing field on which students will be competing for jobs; demographic changes that demand we eliminate patterns of inequity; and an ever-changing world that requires lifelong learning skills. Many districts turn to competency education with the growing realization that no matter what programs, instructional models, or curriculum they put into place, the best they can hope for in the traditional time-based, one-size-fits-all system are marginal improvements. That’s because the design of the traditional system—with students advancing from grade to grade without successfully building the necessary skills—is getting in their way.

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<sup>ii</sup> Please note that the phrase **learning continuum** will be used to describe the standards or the expectations of what students should be able to do. The term **learning progression** is used to refer to the domain-specific, research-based instructional strategies that will help students move from one concept to the next (i.e., how to help students progress). One way to think about the difference is that the learning continuum is the “what,” and the learning progression is the “how.” For more information on learning progressions, see [Learning Progressions: Supporting Instruction and Formative Assessment](#) by Margaret Heritage.

Once they understand the design flaws of the traditional system, educators seek a system that is designed for success, not for sorting. They envision a system that is able to personalize learning while ensuring that all students will benefit. It only makes sense—we know students start with different sets of skills, learn in different ways, have different levels of support in their families and communities to help them with academic learning, and take different amounts of time and practice to master skills. Thus, the system needs to be designed to be more responsive to students' needs, as well as their strengths and interests. Learning is the constant; resources, learning experiences, instructional support, resources, effort, and time may vary.

As educators become familiar with the elements of competency education, they begin to see the power of developing clearly defined learning objectives and rubrics. The focus is now on what students are learning, not what activities they are doing. Student agency (the ability of students to own or manage their learning process), engagement, and motivation are increased when learning objectives are transparent. Students have more options about how they learn and how they demonstrate their learning. Teachers can become more creative in how they design curriculum and instruction. Access to data on student progress allows education leaders to manage continuous improvement.

### III. Ramping Up for Transformation

A common driving force for superintendents and principals converting to competency education is the realization that any system that advances students even if they haven't learned the skills and content is going to produce gaps in learning. Many districts describe low academic achievement or intransigent inequity as their "burning platform"—the reasons that propel them forward and create urgency for their efforts. They describe a growing understanding among educators about the need to start focusing on what is "good for kids." Once this happens, it's as if a fog lifts and educators can suddenly see beyond the assumptions and traditions of the time-based system. They can begin to imagine what a system that is designed so all students are successful in school might look like.

Districts don't suddenly throw out the old system. New structures, cultures, and practices have to be put into place while dismantling the "load-bearing walls" of the traditional time-based system. The first step is laying the groundwork for transformation. There is no set process that every district follows, as the context and depth of leadership within the district will vary; however, beyond the development of a strategic process, there are three activities that almost all districts and schools undertake to prepare for the work of re-engineering the system around learning and teaching:

- Investing in shared leadership
- A shared journey of inquiry
- Creating shared vision and shared ownership

The emphasis on sharing denotes that these approaches differ from those commonly used in traditional systems. These are collaborative approaches that generate respect and trust. They contribute to the formation of a different type of school culture—one that is student-centered rather than system-centered, empowering rather than compliance-oriented, cooperative rather than dependent on individual leadership, and motivated by learning rather than by carrots or sticks.

#### A. Investing in Shared Leadership

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*As an instructional leader, I focus my job on three goals. First, my job is to keep the compelling purpose of supporting our students alive. It's easy to slip back into doing things just because that's the way we've always done them. Second, my job is to empower our staff. They need to have the freedom to do their jobs in supporting our students. Third, I operate from a position of service and collaboration. This is very important because if I used top-down leadership, I wouldn't be able to empower staff. These three elements go hand in hand.*

*The reason that Lindsay is able to make this transformation is because of the structure of shared leadership. The process we use to arrive at decisions reduces mistakes because we make sure to gather input and address all the issues. We seldom have to cut and recut because we are measuring every step of the way.*

– Jaime Robles, Principal, Lindsay High School

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This section starts with a focus on leadership because the shift to competency-based education requires a personal commitment from superintendents and principals to develop collaborative leadership and management styles. Changing personal leadership styles means these professionals must undertake extensive study, solicit feedback for reflecting on their leadership, engage in dialogue with peers and colleagues, and even seek out coaching. Each leader will have a different journey toward developing leadership/management strategies that are effective in creating and sustaining empowering, learning organizations. In the following discussion, three aspects of leadership are discussed: the call for a distributed leadership style, the role of a culture of learning, and empowering others.

### **1. Distributing Leadership**

Superintendents and principals agree that top-down management doesn't work well in competency-based environments—or, for that matter, in any large district reform. The traditional education system operates on a set of rules for the delivery of education services that has tried to standardize the inputs so all students have the same exposure to the curriculum. In top-down systems, higher levels of governance set the conditions for each lower level, leaving schools and teachers with little autonomy or opportunity to inform decision-making at higher levels. Traditional leadership styles are often characterized by people turning to the managers above them to resolve issues or set the direction. Changes are often communicated through memo, where dialogue is limited, if not nonexistent.

The problems with this kind of compliance-oriented leadership style are three-fold. First, top-down approaches undermine any efforts to create an empowered staff who will take responsibility for ensuring students are learning. Top-down decision-making essentially undermines accountability. Second, when employees look to the next level up to answer questions and resolve issues, it undermines the culture of learning and is a lost opportunity for building problem-solving capacity within the organization. Third, no superintendent or principal can have all the knowledge or answers about how to best respond to students or address organizational issues. During periods of dramatic change, this becomes a risk, as the superintendent or principal is unlikely to be able to understand all the ramifications of every change. It requires collaborative, iterative processes to create the new operational policies and procedures needed to support a personalized, competency-based environment. Fueling a competency-based system requires the engagement and ownership of students, educators, and community members alike—an idea that will be explored in depth as the paper progresses.

In a personalized, competency-based education system, it is incumbent upon districts and schools to continuously improve at every level. Teachers support students to build the habits of learning they need to take ownership of their education. Teachers facilitate and guide learning through cycles of adaptive instruction in which students receive timely feedback. Professional learning communities offer embedded professional development so teachers are continually learning how to better support students, drawing on their colleagues' expertise when needed. Superintendents and principals play an instrumental role in managing decision-making processes, reminding their staff to turn to the guiding principles to solve problems and seek innovation. Throughout the transformation process, all these changes are continually informed by data on student progress and pace.

Virgel Hammonds, Superintendent of RSU2 in Maine, describes a common challenge in the old style of leadership. As administrators ascend the career ladder, they increasingly find themselves trapped by the expectation that they should have all the answers. The irony is that as authority and rank increase, the further administrators are from daily decision-making related to students. Hammonds points out that this kind of thinking places too much authority in one person's hands, and can also lead to the mistaken belief that one person has all the answers—when, in reality, all perspectives have critical insights into solving problems.<sup>5</sup>

A shared leadership style takes this all-knowing superintendent or principal position and transforms it to one of respect, trust, and collective intelligence. Also known as adaptive leadership, middle-up-down management, distributed leadership, or servant leadership, these approaches have several common attributes: investing in empowerment, seeking input, collective ownership, and transparent decision-making processes. These forms of leadership seek to move beyond the limits of the “dance floor and the balcony,” in which hierarchical position defines perspective to create structures and approaches that build multi-dimensional understanding of problems as well as expanding possibilities.<sup>6</sup>



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- Invest in building the leadership capacity of the district team and school leadership very early in the process. Ensuring that management staff have a chance to reflect on their leadership styles, engage in an inquiry process, and plan for the next stage of work is empowering. It is important to align the strategy for ramping up and transitioning to the capacity of the leadership team to manage inclusive decision-making processes and distributive leadership.

## 2. Creating a Culture of Learning

*Culture. It is not part of the game. It is the game. Does your building believe all students can learn? Do the educators have a growth mindset or a fixed mindset? Do they believe they have a say in how the school operates?*

*I have too often listened to school administrators find every reason to explain away their poor culture. They blame the Department of Education, the parents, the central office, and even the students. I too blamed the external environment until I realized that the culture of my school is the one thing I can impact directly.*

*A leader must envision the culture he or she wants. To begin, ask yourself, “What do I want an outsider or a new parent to say when describing the culture of the school?” This vision will become the postcard destination, the perfect scenario. Analyzing the gap between the current and the envisioned will define the steps that need to be taken to create and then maintain the desired culture.*

– Bill Zima, Principal, Mt. Ararat Middle School

Educators who have started down the road to competency education often discuss the fact that competency education is a second order change. Whereas first order change focuses on altering inputs and approaches, second order change is based on a different set of underlying beliefs and relationships. The culture of learning breathes life into the values and assumptions of competency education.

Sanborn Regional School District in New Hampshire aspires for the district to operate as a professional learning community by emphasizing three pillars: collaboration, competency, and culture and climate. One of the early shifts Superintendent Brian Blake undertook was to take a hard look at the multitude of initiatives that were underway. “One of the big steps we took in moving from first order to second order change was to whittle down the ninety-plus programs and initiatives to a few that were highly aligned with our new direction. Now we

only focus on efforts that are absolutely aligned with our goal for the district to be a true professional learning community. We believe if it is worth doing, it is worth doing system-wide as part of our competency-based operations and practices.”<sup>7</sup>

Although the language may vary, competency-based districts and schools tend to emphasize similar characteristics. For example, the culture of Mt. Ararat Middle School in Maine can be broken down into four main components: learner centered, clear expectations, continuous feedback, and valuing relationships. All four components relate to both students and the adults in the school. Bill Zima, Principal at Mt. Ararat Middle School, states that one of the key functions of principals is to be vigilant in nurturing the school culture. “School culture is created through what the leader creates and what the leader allows.” He recounts that he had to develop his personal leadership by building a leadership team, implementing effective action planning, skillfully facilitating meetings, and nurturing a strong culture of learning. He paid particular attention to group norms, rituals, and protocols for meetings so that everyone could share ownership for nurturing the school culture.<sup>8</sup>

### 3. Empowering Others

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*When we started down the road to transformation, we had to deconstruct the systems that were in place. We redesigned with the goal of student ownership, involving them along the way. If students are going to be empowered, so must the workforce be empowered.*

*The only way to manage an empowered workforce with empowered students is through a middle-up-down management approach that constantly seeks input and opportunities to distribute leadership. Superintendents who separate leadership and management do so at their own peril.*

– Dr. Bob Crumley, Superintendent, Chugach School District

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The transparency of the competency-based infrastructure for learning—with explicit habits of learning, measurable learning objectives, rubrics, and calibrated understanding of proficiency—empowers students and teachers alike. Students have more agency in the learning process and teachers are more responsive because they know exactly how students are progressing in mastering learning objectives. Thus, the transparency that is required to make competency education work also requires empowered teachers and a high degree of school autonomy.

District and school leadership in competency-based systems are vigilant about nurturing empowerment. It begins by turning to research on motivating, engaging, and empowering adults. Bob Crumley, Superintendent at Chugach School District in Alaska, developed a leadership-management style based on three elements that motivate employees: being challenged, working within a social context, and having autonomy. “These three ingredients are the foundational building blocks I used with students in my classroom, and I also use them now with my staff. It is absolutely critical that this approach is used consistently. You need to make sure your teachers are empowered if you expect them to support empowered students. I always return to these three elements when we are starting a new initiative or addressing issues raised through continuous improvement.”<sup>9</sup>

Creating a safe environment for employees to take risks is a key component of this process. Strong professional learning communities are essential for empowering teachers, and building respect and trust among teachers is important if they are to take risks in learning how to operate in a personalized, competency-based environment. However, creating a safe environment for learning begins with district and school leadership. Tobi Chassie, a project manager of the transformational process at Pittsfield School District in New Hampshire, emphasized, “Risk taking and valuing mistakes as learning opportunities are role modeled starting with the superintendent.”<sup>10</sup>

Virgel Hammonds also considers creating an empowering culture as one of the essential tasks of his job. To this end, he makes it a point to hire principals with similar values and an approach that is cohesive with the current system. By looking for qualities like active learning, a collaborative work ethic, and humility in incorporating the thoughts and ideas of others, he has been able to create a team with a commitment to distributed leadership. He also looks for candidates who are committed to serving both children and the community in which they live, as well those who are able to lead and empower through empathy. Through this approach, it’s not just the students who will be pushed to reach their full potential, but the entire staff, as well.



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- An important step in empowering the teaching workforce is to make sure they have the resources they need. This includes strong professional learning communities, time to plan and meet, and feedback on their teaching skills as well as their participation in developing a strong school culture and organization. This may seem obvious, but many schools try to move forward without having these elements in place, only to find that they are important ingredients.

## B. Constructing a Shared Journey of Inquiry

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*I didn't know how important it was in the beginning, but we are now at the point where staff understand that students must have a growth mindset to take on ownership and for continuous learning to occur. The research on brain science and how the brain changes as you learn is fascinating to both students and teachers. In fact, learning about brain science and the growth mindset has been the catalyst for change for some teachers. It's now institutionalized in our work.*

– Debbie Treece, Director of Special Education, Chugach School District

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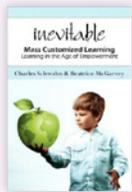
Transforming districts and schools starts by engaging in a period of study. The superintendent may engage the school board in a series of readings, discussions, retreats, and site visits. A leadership team involving key district personnel and principals will look more deeply at the issues to examine how other districts have proceeded and to reflect on options for designing a process for moving forward. Superintendents also begin to have initial conversations with stakeholders in the community to lay the groundwork for understanding why we need a more personalized system, the problems with the traditional system, and the benefits of redesigning to ensure students are learning. Principals will later engage educators in inquiry teams in a similar process and also begin to review research about how students learn, brain science, motivation theory, and grading practices.

District and school leadership will drive the study groups and conversation with a set of questions such as the ones below:

- Why do we exist as a school? What is our purpose?
- What do successful people have that we want our graduates to know and be able to do?
- How will our children support the future growth of our communities, state, and country?
- What are the values that will govern how we interact with each other?
- What are the principles by which we will make decisions?

## RECOMMENDED READING

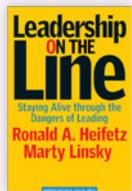
Districts and schools often use common readings as a way of beginning to build a new set of assumptions and reference points upon which to ground the new district culture. Tom Rooney recommends [Inevitable, Mass Customized Learning](#) by Bea McGarvey and Charles Schwahn as one of the most important books to help educators build a shared vision. Other books often used by districts include:



**[Inevitable, Mass Customized Learning](#)** by Charles Schwahn and Beatrice McGarvey



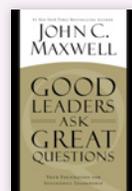
**[Total Leaders](#)** by Charles Schwahn and William Spady



**[Leadership on the Line](#)** by Ronald A. Heifetz and Martin Linsky



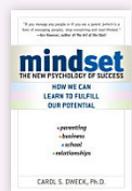
**[Building a New Structure for School Leadership](#)** by Richard F. Elmore



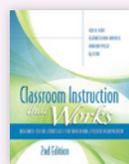
**[Good Leaders ask Great Questions](#)** by John Maxwell



**[Delivering on the Promise](#)** by Richard A. DeLorenzo, Wendy J. Battino, Rick M. Schreiber, and Barbara B. Gaddy Carrio



**[Mindset](#)** by Carol Dweck



**[Classroom Instruction that Works](#)** by Robert Marzano<sup>11</sup>

It is through this process of studying together, of no one having all the answers, of listening and respecting each perspective, that district and school leadership can begin to introduce a different leadership approach as well as the roots of a student-centered, problem-solving culture.

Time will of course be a constraint, and the timeline for moving to the next stage of work will be dependent on the ability of the inquiry process to advance to the point where people are ready to begin shaping a shared purpose. Throughout this process, a sense of urgency develops as the traditional system becomes intolerable and a sense of “moral purpose” develops to transform the system to be student-centered. Virgel Hammonds describes how his district felt a great deal of urgency to get the system, structures, and processes right. “We have zero time to waste. We need to be relentless in that we need to figure things out. As a superintendent, I also need to be clear about when we need to slow things down in order to figure out complex problems. My job is to keep the pressure on without forcing staff to feel that they need to come up with a short-term fix.”



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- As people have rich conversations around issues such as what they want students to know and be able to do upon graduation, the benefits of personalizing learning, and the principles of putting students first, they will also begin to understand many of their past struggles in a different way. These issues may include how previous decision-making has taken adult concerns into consideration more than student concerns, how a compliance culture undermines a sense of ownership and empowerment, and how current practices and structures undermine learning of educators and students. This can open the door to a wide range of emotions and finger-pointing. This moment is a key leadership opportunity to reinforce a school culture that accepts mistakes as part of the process of learning, begins to build collaborative problem-solving skills, and instills a sense of empowerment and accountability for going forward.
- District and school leadership will want to assess the degree of respect and trust that is in place. It is difficult to begin the actual transition if there is inadequate trust. Invest in building strong professional learning communities, seek out coaches to help build the leadership skills to manage more inclusive processes, and seek feedback from staff. Most importantly, take the time to listen.



**Assessment is part of the learning cycle that creates a positive learning experience for students.**

## C. Creating Shared Vision and Shared Ownership

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*Creating a personalized, performance-based system starts with engaging the community in an authentic way. Our entire transformation started with the communities and school board challenging us—they wanted to know why their children were not reading at grade level. We were not effective in helping our children to learn the basics or preparing them for success in their lives, and we had to find a way to overcome that.*

*Twenty years later, we are thankful for how our community guided us in the right direction by asking difficult-to-answer common sense questions. Their description of what they wanted for their children helped us to understand we needed to approach students holistically. We needed to be able to prepare students for being successful in their lives—whether that was to live in remote areas, live in urban areas, go to college, work in a business, or create their own methods of supporting themselves.*

*I think the biggest mistake that districts moving toward performance-based systems make is that they skip the community engagement piece. To community members, it quickly becomes “your system” and not “our system.” Too many districts glance through that step, and it always comes back and bites them. When we transform our schools to a personalized system, we have to start with being community-based.*

– Dr. Bob Crumley, Superintendent, Chugach School District

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Creating a shared vision and using a process that develops shared ownership for ensuring that students learn is the heart and soul of competency education. It is also the heart and soul of mutual accountability between educators, students, parents, and the community.

It is through this process that districts become learner-centered, not just standards-driven. Community members, parents, students, and educators all come to terms with the fact that the traditional system was designed to sort students, and the goal now is to design a system to ensure students successfully learn. Standards are important to establish where we want students to go (i.e., what we want students to know and be able to do), but the important thing is focusing on what it will take to get students there. Without a vision and sense of ownership that is deeply shared, districts cannot put the new instructional model (described in the next section, *Designing the Infrastructure for Learning*) into place. Without the shared purpose, the result is likely to be a standards-based system, at best—and it is only by creating shared vision that the learning-centered spirit develops to inspire students, educators, leadership, and community members to collaborate, seek to build their capacity, search for new innovations, and discover new opportunities. Debbie Treece, Director of Special Education at Chugach School District, emphasized this point with, “The shared purpose and shared values help us to have a common way of talking about issues and solving problems.”

For many districts, shared ownership can also change the nature of the relationships between the community and schools. Andrea Korbe, a Chugach School District board member and parent, told a story of how her community of Whittier has become so engaged in their students and schools that community members seek

out significant opportunities for students to enrich their education, including a waitress initiating a partnership with NASA when she learned her customer was an astronaut. They feel ownership around their schools and understand the many roles they can play.

## 1. Engaging the Community

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*We took direction from the community about the kind of graduates they wanted and the type of school they wanted. As we began the high school redesign process, we never backed off from engaging our community. Our community is in the driver's seat.*

– John Freeman, Superintendent, Pittsfield School District

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In order to establish a community engagement process, districts will need to invest in structuring and facilitating ongoing conversations. The community in Pittsfield, New Hampshire demands to be an active partner—not just in the initial conversations, but in a sustained way. Thus, Pittsfield School District offers a case study of a multi-pronged approach to community engagement that provides formal structures for ongoing conversations and continued learning and is prepared to engage around challenging issues when they arise.

**Start with Questions, Not Solutions:** Pittsfield recommends that districts and schools that are beginning the community engagement steps avoid declarative statements like, “We are going to become competency-based!” By starting the conversation with the solution instead of an honest discussion, schools undermine any chance for authentic dialogue. In addition, buy-in strategies do not solicit the invaluable input and ideas from the community.

Instead, the focus should be on what communities and parents want for their children upon graduation... and then the role of the school in fully preparing them for that goal. This is where the conversation begins about what it means to personalize the learning experience to ensure students reach proficiency on all the important skills they will need to be successful in the next stage of their learning. Is it misleading to have an idea where the conversation might end up? Not at all—because it is likely that your community will introduce ideas that expand beyond your own understanding and vision for a personalized, competency-based education system. For example, Tobi Chassie emphasizes that it was invaluable to have community members participate in the process, as they raised issues that educators might have skipped over. “We had not included anything to address unmotivated learners. It was a community member who pointed that out, raising the question about what was in place to support that set of students.”

**Structure Governance to Include Community and Students:** At Pittsfield, a thirty-five-member Community Advisory Council was created with six sub-teams, which contributed to an overall logic model that was turned into a roadmap for implementation. The teams explored personalization that emphasized student-centered learning, an understanding of the learning process as a combination of habits of mind that supported inquiry-based learning, the goal of building the twenty-first century skills that would prepare students for college and career readiness, and an expectation that students would demonstrate their learning through authentic assessment.

The Council (renamed the Good to Great Team) continues to meet once a month as a full group and once a month in sub-teams that include talent management, community engagement, parent engagement, and student engagement. As Chassie explained, “Community engagement is the key to sustainability. If the district and school leaders fell off the face of the earth, the community would keep it going. They are creating the public demand.”

**Inform Design and Implementation from Multiple Perspectives:** Pittsfield developed several approaches to engage the community and gather knowledge from different perspectives. They knew it was important to identify as many issues as early as possible and make sure they had been taken into account. To this end, they created a Competency Education Implementation Task Force of three students, five parents, three community members, and eight faculty members to ensure that all perspectives and concerns were addressed. The task force visited neighboring schools to learn more about the transition and to help identify potential implementation issues that might arise.

## WHY ENGAGE THE COMMUNITY?

District leaders offer many reasons for engaging the community early on in the process of converting to competency education.

- **Nurturing Consensus and Leadership:** Communities need to be given time to understand the new structure and why it is important. The greater the number of people in the community who are knowledgeable about the process, the more they can help others to understand.
- **Contributing Valuable Perspectives:** Members of the community will bring ideas to the table that educators might not necessarily include. They will bring their values and perspectives to create a richer conversation.
- **Re-Aligning Roles:** Engaging community members will shake up the bureaucratic dynamics that have come to shape how educators often interact with families and community members.
- **Re-Building Respect and Trust:** Community engagement can help to overcome mistrust and build the mutual respect that is needed to create a culture of learning. In most districts, there are segments of the community that have either had bad experiences in school or have historically been underserved and disrespected by school systems. Districts must create a space for people to talk about what they want for their children, have honest conversations about the current academic achievement levels and graduation rates, and share their fears.
- **Sustaining Change:** Community engagement is an essential ingredient for staying the course when unanticipated consequences of implementation arise and when district leadership changes.
- **Unlearning Old Routines and Practices:** Districts and schools will receive feedback on what has not been working in their previous community engagement strategies and can begin to co-design new strategies with the community.

There is an additional reason that community engagement is needed in the process of converting to competency education: to build respectful relationships with students. In order to foster strong relationships, school personnel need to have a sense of the culture and experiences that shape their students' lives. In competency education, valuing the insight and perspectives of the community has to come first. In fact, the most successful district conversions to date begin the process with strong community involvement.

Pittsfield has also built the capacity to include student involvement in governance throughout the district. By turning to the Center for Secondary School Redesign, the adults in Pittsfield learned to engage with students on committees and task forces. One important step was to clarify the scope of the committees and the responsibility of members. Students continue to have a strong sense of ownership in the school and their education, and policies are more student-centered than they might have been otherwise.

**Go into the Community:** Pittsfield used a multi-pronged approach to engage the broader community as they moved into the transition stage. First, they worked with [NH Listens](#) to organize forums facilitated by community members. Then, in partnership with [Pittsfield Youth Workshop](#) and other local organizations, they held a pig roast in a downtown park to attract community members unlikely to come to the school. Computers were set up so teachers could show what competencies and reports cards would look like. They also invested in making sure students fully understood the new system and why it was important to make the transition. Lois Stevens, Director of Student Services and the Chair of the Competency Implementation Team, explained, “Students carry the burden of what is happening in the school. We wanted to make sure they understood it and could explain it from their firsthand experience.”

At Pittsfield, the strategic focus is on student-centered learning, with the competency-based infrastructure operating as the backbone of the secondary school. The district has strengthened its strategic communication capacity to engage the community around student-centered learning and interacting with students. It is also in constant conversation with the community. Meetings are set up before reports are released and as new ideas are being developed. Superintendent John Freeman is constantly presenting to the Select Board, Rotary Clubs, churches, and other community organizations. Students are a part of the communication strategy, participating in presentations and helping to explain student-centered learning.

The communications demands will be heavy in the early stages of putting a competency-based structure into place. Thus, it is helpful to put the organizational structures and processes in place so that ongoing dialogue continues. Strategic communication should constantly reinforce the shared purpose and highlight why it is important to upgrade the design of the education system to better meet student needs.

In engaging with the initial phase of shaping a shared purpose—as well as the subsequent work to create an instructional structure and implement it—there will be a constant stream of questions. Districts will need to be prepared for some of these issues to be raised in the local media. Some may be easy to answer, but many will require creating mini-conversations that help people understand why the district is trying to change the education system they know so well. Instead of trying to answer each question separately, ask your own question that will open a conversation or prepare a story that will resonate.

Increasingly, there are resources available to help education leaders prepare a strong message. [Achieve](#) has created a [communication tool kit](#) that can help prepare for these kinds of conversations. Frameworks Institute offers a toolkit called [Telling Stories Out of School: Reframing the Education Conversation through a Core Story Approach](#), which places the focus on our need to prepare our children for the future. Great Schools Partnership offers several resources, including [Ten Principles of Proficiency-Based Learning](#). However, learning from peers will always be the most helpful in learning how to respond to the variety of questions that pop up. Brian Stack, Principal at Sanborn Regional High School, shared his answers to [common questions](#), including, “Can you explain how competency-based grading practices will help prepare my child for college?” and “Is it true that deadlines don’t matter in a competency education system?” Identify students, parents, teachers, and community members who are effective in communicating personalization and competency education, and ask them to help address questions as they arise.

To date, the districts that have begun the transition to a competency-based system contain fewer than 50,000 students. Larger districts will need to invest more in community engagement strategies and think through roll-out strategies that will build trust with the different sectors of their community. No matter the size of the district, leadership will need to demonstrate that community engagement is a priority and ensure that processes, structures, and timelines are built so that community members can be involved, not just informed.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Districts that want to engage their community change how they organize meetings. They stop having meetings only at the district office or school buildings and find places where community members feel comfortable, including work sites, faith-based institutions, and community centers. They stop having meetings only in the evenings and schedule a variety of different times, including the weekend. They offer daycare, food, and materials in the language of their community members. Most importantly, they structure the agenda so that dialogue is a priority.
- Expect that students who perceive they are succeeding in the traditional system (and their parents) to have a lot of questions about competency education. Be prepared to talk about how students aren't competing against their peers but against students all around the world, and how the GPA can mislead students into thinking they have learned everything they need to know. Emphasize how expectations of learning have increased so students need to apply skills and content—not just recall them—and that applying skills often takes more effort on the part of students who are used to succeeding under the rules of the traditional system. Engage higher education admissions officers in conversations so parents know that competency education won't hurt their child's chances of getting into college.

### **2. Creating the Shared Purpose**

Creating a shared purpose requires districts to develop their capacity for facilitated conversations (i.e., the ability to listen deeply to each other while driving for an agreed-upon vision, statement, or solution). Districts have used a simple set of questions that generate robust conversations. For example, Lindsay Unified School District in California invested in deep community engagement to launch their transformative process, beginning with the questions:

- Why do we exist?
- What are the values that will govern how we interact with each other?
- What are the principles by which we will make decisions?
- What is our vision for the future?
- What is the description of our graduates?

The result is a mission of “Empowering and Motivating for Today and Tomorrow,” a set of core values and guiding principles that drive their instructional model. (See Exhibit 3.)

### Exhibit 3: Lindsay Unified School District Core Values



LINDSAY UNIFIED  
SCHOOL DISTRICT

#### Our Core Values:

*Guide our behavior; govern how we will work together  
as we carry out the mission and vision.*

**INTEGRITY** – The embodiment of honesty, fairness, trustworthiness, honor, and consistent adherence to high-level moral principles

**COMMITMENT** – People’s willingness to devote their full energies and talents to the successful completion of undertakings

**EXCELLENCE** – A desire for, and pursuit of, the highest quality in any undertaking, process, product, or result

**RISK-TAKING** – Taking initiative, innovating, breaking the mold, and speaking out in sincere attempts to support core values

**TEAMWORK** – Working collaboratively and cooperatively toward achieving a common recognized end

**ACCOUNTABILITY** – Taking responsibility for the content and process of decisions made, actions taken, and the resulting outcomes

**IMPROVEMENT** – A commitment to continuously enhance the quality of personal and organizational results, performances, and processes

**OPENNESS** – A willingness and desire to receive, consider, and act ethically on information and possibilities of all kinds

**ALIGNMENT** – The purposeful, direct matching of decisions, resources, and organizational structures with the organization’s vision

**COURAGE** – The willingness of individuals and organizations to risk themselves despite the likelihood of negative consequences or fear

In developing a shared purpose, Chugach School District had to engage communities from three different areas as well as a statewide homeschool community based all across Alaska. The resulting mission statement emphasizes student agency, mutual accountability, and cultural respect.

Bob Crumley recounts using the following process in meetings to initiate the Chugach shared purpose.

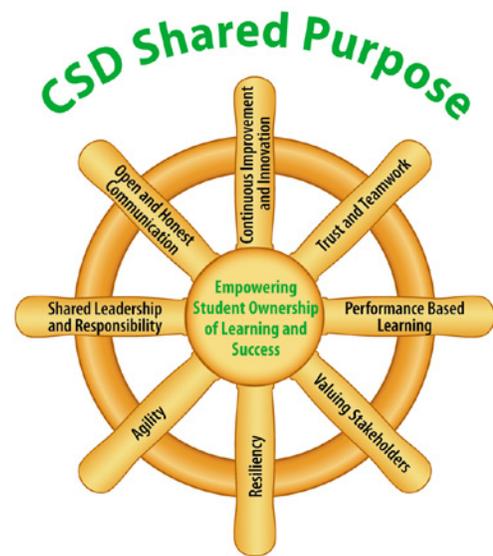
1. Turn to a neighbor and tell each other your district’s shared purpose. Now, by a show of hands, how many were able to articulate our shared purpose? (In the beginning, there were few hands.)
2. If, as leaders, teachers, and parents (depending on the group), we aren’t able to articulate our shared purpose, how are we going to work together to clearly articulate expectations and provide a roadmap for our students to achieve success?

3. Ask students to think of a successful person (local, national, or international). Then begin a discussion on the following questions: What traits does that person have that helped them become successful? Which of those traits should we teach and assess to set all of our graduates up for success?
4. Use the input to form the backbone for developing a draft shared purpose as well as informing student performance standards at a later stage.

Currently, Chugach School District operates according to the following shared purpose:

*The Chugach School District is committed to developing and supporting a partnership with students, parents, community and business which equally shares the responsibility of empowering students to meet the needs of the ever changing world in which they live. Students shall possess the academic and personal characteristics necessary to reach their full potential. Students will contribute to their community in a manner that displays respect for human dignity and validates the history and culture of all ethnic groups.*

That shared purpose of “empowering student ownership of learning and success” is supported by eight values (or elements) of performance-based learning, valuing stakeholders, resiliency, agility, shared leadership and responsibility, open and honest communication, continuous improvement and innovation, and trust and teamwork.



Creating the shared purpose is important; however, the real value comes in making sure it is used consistently. District and school leaders who have developed shared purposes, shared values, and guiding beliefs use them frequently to make decisions big and small during the transition years. According to Jamie Robles, Principal of Lindsay High School, “My job as a principal is to make sure our decision-making processes are managed effectively. At times I may need to step in to remind the team of our compelling purpose—our learners. When we have a shared goal, it makes decisions a lot easier. Collaboration is also a lot easier.”<sup>12</sup> As Bill Zima put it, “A process of facilitated conversations amongst all stakeholders led to the establishment of a philosophical lens through which all decisions pass.”

In order to engage the full organization in working toward a shared purpose, leaders need to be skilled in tapping into what drives adults. Bill Bryan, Center for Secondary School Redesign and a coach to educational leaders, explains that most adults are driven by task accomplishment, influence, or relationship needs. Educators are also often driven by intellectual curiosity and altruism. In order for leaders to engage administrative staff and teachers to direct their energy toward creating a new personalized, competency-based system and move outside of their comfort zones, they will need to understand the motivational drivers. Furthermore, they will

need to develop a deep understanding of what underlying resistance is and employ the appropriate influence skills to help people overcome it. Thus, changing practices—introducing new ones and letting go of the old—is a leadership function, not management.<sup>13</sup>

Equally important to engaging community members is to make sure educators are also fully engaged. Inquiry teams are important for educators to take the time to understand personalization, why it is important, how the traditional system is undermining their efforts, the implications for moving to a personalized, competency-based system, and how they can assess the way the school operates with a growth mindset or a fixed mindset. Some districts do not move forward until a large majority of educators in a school indicate they are ready. A case study on RSU2's Hall-Dale describes in detail the process the district took in considering a proficiency-based system, including a vote in the second year of the process in which the educators decided to move forward.<sup>14</sup>



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- Ask a consultant to interview people in the organization (students, parents, teachers, principals, administrative staff) to help determine how consistently the new ideas are taking hold and identify patterns where there may be resistance, doubt, or confusion. This will provide invaluable insights into where superintendents and principals need to direct their leadership, engage others more deeply, support others in building their leadership skills, and reinforce the new culture of learning.

## SEEKING ASSISTANCE

Just as students need support to learn and teachers need mentoring, coaching, and training to build their skills, so too do district and school leaders require help in moving through the process of converting to a competency-based structure. We asked the districts highlighted in this paper to share which organizations were most helpful to them in their journey towards personalized, competency education. Below are their organizational recommendations, followed by specific resources in parentheses that may be useful.

- [Center for Collaborative Education, Quality Performance Assessment \(OPA Guide\)](#)
- [Center for Secondary School Redesign \(What Top-Performing Leaders Think About\)](#)
- [Great Schools Partnership \(Proficiency-Based Learning Simplified\)](#)
- [Marzano Research \(Proficiency Scale Bank\)](#)
- [QED Foundation \(Transformational Change Model\)](#)
- [Reinventing Schools Coalition \(Individual Mastery Pathway and Organizational Change Pathway\)](#)
- [2Revolutions \(Roadmap for Competency-Based Systems\)](#)

## iv. Designing the Infrastructure for Learning

*In the traditional system, a one-size-fit-all curriculum and instruction is emphasized—with one textbook and one method of instructional delivery. Competency education is constantly asking what kids are learning and adjusting across a more flexible instructional model to offer choices in content, learning experiences, differentiated instruction, and personalization for kids to learn and develop skills and demonstrate mastery, with assessment focused on students showing what they know. Competency-based schools use a model of instruction and assessment in which mistakes are part of the learning cycle and success is the only option.*

– Susan Patrick, President and CEO, International Association for K–12 Online Learning (iNACOL);  
Co-Founder, CompetencyWorks

After the ramping up efforts have been put into place, the next phase of implementation is to re-engineer the learning infrastructure. The traditional system is based on three elements: a) time (days per year, hours per day, the time-based credit, semesters, agrarian schedule, promotion based on age); b) focus on curriculum and instruction; and c) A–F grading based on assignments, assessments, homework, and behaviors. If this system has been producing low achievement and inequity, what type of infrastructure and operations can be put into place to produce learning consistently with all students?

The following steps in developing what will be referred to in this paper as the Instruction and Assessment model (I&A model) are not necessarily done in a linear fashion. They actually require an iterative approach so alignment can be developed within the learning infrastructure. Whether you start from scratch or draw from other districts, you will find that the discussion takes you deep into the core of learning. You may also find that once you remove the infrastructure of the traditional system, the experience is like trying to “organize spaghetti,” as described by Ty Cesene from Bronx Arena.<sup>15</sup> The options will feel infinite as you begin to question the pillars, customs, and operational procedures that hold the traditional system in place.

Most districts focus on the core changes needed to create a transparent, coherent system that empowers students and teachers. They want to focus the attention on what is needed to ensure learning and progress, knowing that parents and communities are comfortable with the traditional understanding of how schools operate, and that some of the traditional structures still have meaning in today’s world. For example, in many communities, the agrarian schedule is now a tourist schedule in which employers rely on teenagers to join the labor market in the summer. Although this sounds like an adult issue, work experience is also a valuable component of helping students become college and career ready. Because each operational or policy change requires substantial leadership attention from district and school leaders as well as teachers, most of the districts that have converted to competency education continue to operate within a relatively traditional schedule for the first several years. It is later that they begin to move beyond the trappings of the traditional system.

Before beginning to design the infrastructure that will support your instructional model, take the time to consider the supports, the implications for student agency, your district’s overall pedagogical approach, and how you plan to support teachers through the transition.

## A. Investing in Student Agency

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*In traditional schools, students are passive, and many only attend school because it is compulsory. Or they come with the expectation that the school delivers the knowledge. However, information is now so readily at hand, teachers can't be the disseminators of knowledge. Our community told us they wanted their children to be lifelong learners. We had to ask ourselves, what are we doing in our classrooms to help them be lifelong learners? What structures and supports do our teachers need to help develop lifelong learners? It came down to needing to have an active learning environment. Students need to be able to seek out things they are personally interested in, create a plan, and find the resources. We are always looking for ways for students to learn beyond the classroom.*

– Doug Penn, District Principal, Chugach School District

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Research on motivation and engagement has established that creating opportunities for students to shape their educational experience (i.e., agency) is an essential ingredient for improving academic achievement.<sup>16</sup> Doug Penn, District Principal of Chugach School District in Alaska, referred to a [Ted Talk by Dan Meyer](#) that has sharpened his thinking about the relationship between active learning, deeper learning, and empowering students to take ownership of their learning. In wanting students not to be helpless, teachers need to help less. To accomplish this, schools will need to invest more in developing critical thinking and the habits of learning so students can help themselves.

Engagement and student agency always start with respecting and listening to the different perspectives that each student brings to the school. That's why creating ways for students to express themselves and have voice is central to the work of student agency. Offering choice is equally important. It may start with curricular choice and expand to co-designing learning experiences as students become more adept at managing projects. Most importantly, it is the habits of learning that undergird student agency. Students are not given agency; they need to build the skills to become lifelong learners with the support of teachers and other adults in their lives.

### **1. Enabling Agency through Transparency**

In designing the new infrastructure to support teaching and learning, it is imperative to understand the importance of transparency in enabling student agency. It is by having absolute transparency about what students are expected to know and do, the criteria by which proficiency will be assessed, and a strong understanding of what proficiency looks like that students can begin to have the information they need to take ownership of their learning. The system of grading in competency-based schools indicates to students how they are progressing toward proficiency. It is equally important to be explicit about the habits of learning (those behaviors that contribute to learning).

Brian Stack, Principal at Sanborn Regional High School in New Hampshire, explained, "Competency education has helped the entire school and students get on the same wavelength. With transparency in competencies, conversations focus in on learning. Transparency allows for an entirely different type of relationship between

students and their teachers to form.” To this end, as Sanborn develops an increased understanding of the changing power dynamics, teachers begin to treat students as colleagues. “We are creating a culture of learning,” said Stack, “by eliminating the punitive responses that are found in so many high schools.” Another teacher at Sanborn added to this by stating, “When the competencies are laid out in front for you, you can just get on with the learning. Everyone has a shared vision of why we are in the classroom together.”

## **2. Creating Classroom Structures that Enable Student Agency**

The classroom structures of empowerment are relatively similar across competency-based schools regardless of grade level. At RSU2 in Maine, teachers begin the year by facilitating the development of a shared purpose statement and guiding principles for the classroom. A culture of cooperation develops among students as they take ownership for their education as well as their peers. Oftentimes, the walls contain reminders that mistakes are part of the learning process.

Students know exactly what they are learning and what proficiency looks like. Rubrics are readily available, and there is usually an example of proficient work. There may be posters on the wall for students to indicate where they are on their learning continuum. Students and parents often have access to an information management system that provides information on student progress and what they need to do next to continue advancing. Students should be able to tell you what they are learning, why it is important, how they know if they have learned, and what they will do to access supports as needed.

Providing timely feedback is an important element of creating student agency. If students have to wait a week or more to get feedback, they are more dependent on the teacher to advance, thereby lessening the drive to learn and undermining agency. Self-assessment and peer assessment can strengthen students’ abilities to reflect and revise their own work. Adaptive software can be very helpful, especially for providing rapid feedback.

An emphasis on process skills and reflection helps students become aware of how they are learning. At Making Community Connections Charter School in New Hampshire, students do End-of-Day reflections on their progress in meeting their daily learning targets and developing their habits of learning.<sup>17</sup> At Chugach School District, reflections are part of the cumulative assessment used to determine if students are ready to move to the next level. Increasingly, schools are enhancing their approaches to building habits of learning.

In competency education, students are often provided opportunity in choosing how they will learn, the context of their learning, and/or how they will demonstrate their learning. Blended learning can provide even more transparency for students to move to the next level of study by creating access to the next unit or course. In both of these settings, there are often opportunities for students to co-design their projects based on high interest inquiry. At Chugach, students can choose to learn through individualized learning plans, described by Director of Special Education Debbie Treece as, “Scaffolding, and then stripping away a little bit of the safety net on the way to independent learning.”

Teachers will recognize that the practices described here to develop student agency are the same as those used in managing personalized classrooms. They are in fact entirely interdependent—it is unlikely that a classroom can become highly personalized if every student has to turn to the teacher for every bit of instruction, support, and direction.

### 3. Embedding Student Voice in Governance and Operations

In Pittsfield School District in New Hampshire, students are considered important partners. Students hold the majority of the seats on the Pittsfield Middle High School Site Council and participate in the development of school policy. In order to ensure students can fully participate, they are given clearly mapped responsibilities and guidelines. In this way, the council is authorized to review and approve proposals related to issues like open campus guidelines, rules, handbook revisions, and class meetings, so that before anything goes to the school board, it goes through them first.

Tobi Chassie, a project manager of the transformational process at Pittsfield, pointed out that students are now considered invaluable partners in addressing issues. For example, student participation in the revision of the disciplinary policy led to a different outcome than if it had only been adults making the rules. Students challenged the idea that suspensions were meaningful for improving behavior, learning, safety, or school climate. After student-led research was completed, Pittsfield adopted restorative justice practices. Student participation in the school council and other school governing efforts gave voice to students and built confidence. That confidence quickly spread from the students on the site council to other students.



#### LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- Remember to prepare students for the transition. Provide training to teachers to facilitate conversations that compare the past traditional system and the new competency-based system so that students can articulate how the new system more effectively meets their needs and guides them toward success. For example, you can use the “grading cookies” exercise to engage students in why a different grading system is needed.

**Grading Cookies:** Have students all eat a specific kind of cookie, and grade the quality of the cookie on a traditional A–F scale. Then collaboratively develop a cookie quality scoring guide with the students, and have a second round of eating a cookie to score its quality. Teachers then guide the students through a reflection process to compare the scores from the two scoring processes. This leads to deeper understanding for all students regarding how the new scoring process provides far more consistent, clear, and accurate input about their performance in all content areas, so they can use that feedback to accelerate their learning. Once students are comfortable with such an activity, they are often excited to facilitate the same activity with parents and community members during public meetings about the transition.

## B. Clarifying the Overall Pedagogical Approach

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*Sure, we could make it easier for teachers, but then our students don't succeed. The other option is to admit that teaching is a complex system, invest in the systems, nurture the culture to support professional teachers...and have the kids actually learn. It's obvious which one is the better choice.*

– Jed Palmer, Head Teacher, Tatitlek Community School, Chugach School District

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Some districts and schools may already have a strong pedagogical approach in place, while others may find they need to think more in-depth about motivation, engagement, instruction, assessment, and the role of grading. If there isn't an explicit pedagogical approach in place, it should begin with a review of research and lead to the development of guiding principles about learning and teaching (as discussed in the section on shared purpose).

*What are the research, beliefs, and assumptions that guide your pedagogical approach?* Having a strong pedagogical approach isn't the same as saying you want all teachers to teach in the same way. Instead, it is a set of general principles that help answer questions such as:

- What do we know about the different ways to motivate and engage students?
- Where does student agency fit in learning?
- What role do habits of learning play, and how can they be developed in students?
- What does the research tell us about effective instructional practices?
- What are the types of assessment, and what role do they play in achievement?
- What types of learning experiences are needed to help students reach graduation goals?
- Given your current student population, their academic needs, and their life and learning experiences, how might this inform your school design or pedagogical approach?
- What challenges and educational needs can online and blended learning help you address?
- How do parents and the community at large think about these questions?

In Exhibit 4, Lindsay Unified School District organizes beliefs and guiding principles to emphasize the growth of all learners, learning facilitators, and the overall culture of learning.

*What is the role of the district in ensuring schools can offer a mix of instructional approaches and modalities?* As you begin to think about the role and balance of direct instruction, practical application, group projects, project- and problem-based learning, independent learning, and real-life applications, you will find that school design and capacity issues begin to emerge, including those related to existing schedules, calendars, and partners for extended learning. This is the point where it may be worth spending the time to determine how blended and online learning can best support your students and teachers. Have you had difficulty serving some of your students? Are there some ways that blended and online education can help you strengthen the learning experience for them?<sup>18</sup>

*Is your pedagogical approach standards-driven or student centered?* Many districts take a wrong turn by trying to create a competency-based system that emphasizes the standards without first putting a personalized orientation in place. The result is that classrooms may be heavily teacher-driven, with students expected to do learning tasks at a teacher pace. Lindsay Unified School District has redesigned the role of teachers into learning facilitators. Rebecca Midles, Proficiency-Based Learning Specialist, explained, "Learning facilitators guide learners through a journey that leads to self-directed learning, advocacy, and agency. Only in this way does a learning environment become truly learner centered."

One way to determine the degree to which you have become student-centered is to ask the question of who is doing the bulk of the work in the classroom. "Teachers are often doing all the heavy lifting in a classroom to give bite-size pieces to students," said Jane Bryson of Education Elements. "The alternative is for teachers to put their

## Exhibit 4: Lindsay Unified School district's Beliefs/Guiding Principles



### LINDSAY UNIFIED SCHOOL DISTRICT'S BELIEFS/GUIDING PRINCIPLES

About LEARNERS & LEARNING	About LEARNING FACILITATORS & TEACHING	About LEARNING COMMUNITIES
1. All learners can learn	1. Learning Facilitators are models of continuous learning and improvement	1. All stakeholders in the community are partners in educating Lindsay's Learners
2. Learners acquire knowledge in different ways and timeframes	2. Learning Facilitators inspire, motivate & empower learners	2. Learning Communities (LCs) align all systems, policies, practices to support the principles that learners acquire knowledge in different ways and in different timeframes
3. Successful learning breeds continued success which influences esteem, attitude and motivation	3. Teaching is collaborative and involves on-going learning	3. LCs have high expectations for all learners and staff
4. Mistakes are inherent in the learning process	4. Learning Facilitators set the conditions for a safe, welcoming, joyful classroom environment	4. Learning communities embrace accountability and strive for continuous-improvement
5. Learning and curiosity are basic human drives	5. Learning Facilitators are knowledgeable and competent in pedagogy and human development	5. LCs encourages and supports risk taking and innovation
6. Learners require positive and validating relationships with learning facilitators	6. Teaching reflects the current research on learning and cognition	6. LCs have a clear, shared purpose and direction
7. Learner wisdom is enhanced by meaningful, real-life experiences requiring complex thinking	7. Learning Facilitators relate to & connect with learners	7. All members of the LC are committed to the mission and vision and are empowered to achieve it
8. Learning is fun	8. Teaching and learning are a cause and effect relationship	8. Communication in LCs is frequent, open, and transparent
9. Learning is fostered by frequent, formative feedback	9. Learning Facilitators are the single most important factor in learners understanding	9. LCs are inclusive and embrace diversity
10. Learning is future-focused	10. Learning Facilitators are future-focused	9. LCs are future-focused

effort toward creating the structures to allow students to move more fluidly through the coursework. The goal is to ensure that teachers aren't bottlenecks to learning, but instead facilitate the learning process."<sup>19</sup>

*How is your pedagogical approach taking into consideration the academic equity challenges in your district?* The first step is to review patterns of academic achievement and benchmark yourself against the districts doing the best in the country in serving low-income students, English language learners, and special education. Consider academic achievement of different racial and ethnic groups, including disciplinary patterns of suspension and expulsion. As a district, identify where and why students are disengaging from school based on attendance and failing grades, as well as the level of access for students to re-engage in school to complete their diploma. Given that high schools are still somewhat time-bound by the tradition of graduating with peers, look at how many students enter more than two years behind academically and how many students become over-age and under-credit by the end of ninth grade. Then return to your pedagogical approach and consider how it can be strengthened to ensure that it is addressing the needs of the students who are the most underserved.

Competency education is designed to address inequity and low achievement by enabling personalization through a transparent and calibrated I&A model. However, producing improvements in student engagement and achievement is dependent on the degree that a school's pedagogical approach meets the needs

of students. For example, Harvey Chism, Senior Director of School Design at EPIC Schools in New York City, points out that in a competency-based environment, culturally relevant material can be embedded to respond to diverse classrooms by offering opportunity for student choice and co-design within units.<sup>20</sup> The data about patterns of inequity in academic achievement should drive the development of the pedagogical approach and the continuous improvement processes that are discussed later.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- As districts are guided by the beliefs and principles about teaching and learning, many find themselves turning to performance-tasks and assessments to help lift their instruction from the knowledge levels of recall and comprehension toward analysis, application, and evaluation. Several districts are now investing in strengthening their teaching capacity by providing training on learning progressions and formative assessment to better support students in mastering concepts.
- For districts operating in states that are implementing education policies, such as the Common Core and state accountability-driven assessments, without balancing them with an adequate investment in improving instruction, assessment for learning, and other capacity-building efforts, there will be substantial leadership demands to support teachers in reclaiming their role in teaching students (as compared to curriculum). District and school leadership will need to reinforce mutual accountability, the shared purpose, and collaboration at a time when state policies are emphasizing “blame and shame” accountability policies, narrow understanding of the purpose of schools, and individual teacher productivity.
- As districts establish information management systems to support student learning in competency-based environments, they will find they do not need elaborate tracking systems to monitor when students start to fall off-track. Management reports can be developed to provide nearly real-time data on how students are progressing and which students are not progressing as expected. Schools can respond in a matter of weeks to find more effective instructional strategies, offer coaching to build stronger habits of learning, and, if needed, engage parents and community resources.

## C. Configuring the Instruction and Assessment Model

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*The minute we changed the equation of time and learning so that time became the variable and learning the constant, we immediately faced the question: “How do we manage when we are individualizing the educational experience for kids?” All the systems in the traditional system didn’t help us anymore. We had to start from scratch.*

– Dr. Bob Crumley, Superintendent, Chugach School District

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There are several design decisions that need to be made to create a common language of learning, especially in the context of the district’s overall pedagogical approach and belief about motivation and learning. In addition to

districts engaging the community in the process of developing a shared purpose and guiding principles, there are four core questions educators will need to drive the design and operations of any competency-based system:<sup>21</sup>

- What do you want students to know and be able to do?
- Why is this objective important?
- How are you going to know if students have learned it?
- What are you going to do if they don't (or they do)?

The following sections walk through the design decisions that will need to be made to answer the questions above. At this point in the development of competency education, there is no best model. Districts and schools are making decisions based on a number of considerations, including the availability of technology to support student learning.

### **1. Establishing Overarching Competencies and Proficiency-Based Graduation Requirements**

*What are the overall sets of skills, content, and traits you expect students to have upon graduation?*

The initial work to determine the desired skills, content, and traits is done in partnership with community conversations. Later, districts facilitate conversations with their educators to further develop the goals for their students. Those districts that have fully engaged their communities often have shared purposes that are broader than the current policy of “college and career ready.” The focus tends to be more on lifelong learners and

## **HOW ARE YOU DOING IN CREATING AN EQUITABLE COMPETENCY-BASED SYSTEM?**

- Are students who need to strengthen foundational English language and mathematical skills, no matter what their grade level, offered a chance to fully develop their education with adequate instructional support and additional time to accelerate the annual pace of their learning?
- How rapidly are you identifying students who are struggling and providing them with additional support? Are you waiting for the end of the year? Semester? Month? Week? Day? Do you provide preparation time for students who may have gaps in skills before they start a course rather than waiting until they have troubles? Is online learning available to provide more efficient and differentiated support?
- Do students have to take assessments before they are ready, thereby increasing the likelihood of failure and the need for re-assessments, or are they expected to demonstrate proficiency before summative assessment? Are you offering “competency recovery” rather than expecting students to re-take entire courses?
- Are students who are academically behind or over-age and under-credit offered enriched educational experiences that help them build habits of learning, co-design their learning experiences, and apply skills, or are they being placed in front of a narrow online curriculum in order to complete a course?
- Do students have an opportunity for deeper learning and real-world application of skills no matter where they are on their learning continuum or how far they are behind or ahead of “grade level?”
- Most importantly, are you holding yourselves accountable by collecting data and developing management reports that can help you focus in on where groups of students may not be progressing by race, income, special education needs, language abilities, and gender?

preparing students for life. Thus, the set of learning continuums—the expectations for what students will be able to know and do—is much more comprehensive than just academic disciplines.

Determining what a proficiency-based diploma means as opposed to one founded on time-based credits that have little meaning (and that require so many students to take remediation once they start college) is not an easy process. Is it a floor that everyone reaches and can go beyond? Is it a ceiling at which you have completed high school? Is there a point that it becomes personalized based on student goals?

Determining this meaning and value will raise questions about what it means to be college-ready when the higher education sector offers little agreement or transparency. It will also raise questions about equity—do we expect 100 percent of students to meet 100 percent of standards at 100 percent levels? Given that high school continues to be time-bound because of the importance of graduation as a significant benchmark on the way to becoming an adult, it will raise questions about how to help students who either started with gaps, need greater flexibility, or need more time. Do you build in more time during the four years of high school, or do you begin to plan based on student performance at the end of ninth grade for extended graduation? More than anything, determining the meaning of a proficiency-based diploma will open the door for deep discussion among teachers about whether they and/or the school offers the capacity for the necessary instructional support, and, if not, what needs to happen to build capacity.

Some districts continue to use number of credits to determine graduation, with the understanding that competency-based credits indicate success in learning the skills. Assuming there are mechanisms to calibrate proficiency and maintain quality control in place, this indeed should be the case. Others create specific levels of proficiency to determine graduation. For example, Chugach School District created ten domains with ten levels to describe what they expect students to know and be able to do upon graduation. They developed the Performance Snapshot to show student progress toward achieving the minimum graduation levels in each domain. It's now a reporting tool generated by their AIMS information management system to indicate how students are progressing. The light shaded boxes show the minimum graduation level for each standard. The darker shaded boxes show advanced levels. The district credentials that students are proficient as they move from level to level toward graduation, with teachers determining proficiency within the levels. When they complete the graduation requirements, students then present their School To Life Transition Plan to the School Board prior to graduating. See Exhibit 5 for the Chugach School District Performance Snapshot.

## **2. Constructing a Common Language of Learning**

*What are the explicit and measureable learning objectives to describe what students need to learn on their way toward meeting the graduation goals?*

Districts and schools start with a different mixture of concepts and create a variety of structures to define the learning continuum. It is important to take your overall pedagogical approach into consideration when shaping the overarching competencies. As Kim Carter, founder of Making Connections Charter School, explains, “Designing competency frameworks is a creative process. We gather together the tools we will need the same way a painter might choose brushes and paints.” For ELA and mathematics, most turn to the well-developed Common Core continuum of learning or their state standards. Others will start or embed the essentials of a discipline, asking, “What does it mean to be a mathematician, a historian, a writer, a scientist?” Still others may be designed around themes or career pathways that rely on a structure that starts with the needs of industry.<sup>22</sup> In some cases, states may have even already set a broad framework within which districts and schools can further structure their learning.

### Exhibit 5: Chugach School District Performance Snapshot

**Name:** John A. Student      **Curriculum Name :** CSD 08 standards      **School Name :** FOCUS Homeschool Anchorage

Standard Area	1	2	3	4	5	6	7	8	9	10	11	12
Mathematics						+	✓					
						01/20/13	01/20/13					
Technology						+	✓					
						08/27/12	08/27/12					
Social Studies						✓						
						03/10/11						
Reading						✓						
						03/10/11						
Writing						✓						
						03/10/11						
Culture and Communication					✓							
					03/10/1							
Personal/Social/Service					+	+	✓					
					05/24/13	05/24/13	05/24/13					
Career Development					+	+	✓					
					05/24/13	05/24/13	05/24/13					
PE Health						✓						
						03/10/11						
Science						✓						
						03/10/11						
Early Childhood												

#### Key

	The level preceding the Advanced Level is the Graduation Level. Student must demonstrate proficiency in all the levels up to and including.
	Advanced Level. Student demonstrating advanced skills in that content Standard Area.
	No Chugach School District benchmarks have been identified for that level in that Standard Area.
-	Student is Emerging at that level. Emerging: Student is beginning to work on this level.
✓	Student is Developing at that level. Developing: Student is working on this level.
+	Student is Proficient at that level. Proficient: Student has met level expectations
*	Student is Advanced at that level. Advanced: Student has exceeded level expectations.
PGP	Student has opted for Personal Graduation Program at that level.

There are five components that guide this work:

- a. Knowledge Taxonomy
- b. Structure and Characteristics
- c. Developing the Continuum of Learning
- d. Rubrics and Calibration
- e. Habits of Learning

**a. Knowledge Taxonomy: How do you know the depth of learning and that students are developing high order skills?**

Knowledge taxonomies are a cornerstone of the learning infrastructure. If districts haven't already selected a knowledge taxonomy, it is important they do so in order to design their I&A model. There are a variety of taxonomies, each designed for different purposes and complexities, to choose from: Webb's, the New Taxonomy (often referred to as Marzano's), and Bloom's. (See Exhibit 6.) The knowledge taxonomy will provide teachers with a common vocabulary to talk about student work. It will also facilitate the introduction of higher order skills into conversation. Professional learning communities (PLCs) will be able to use the knowledge taxonomies to look closely at the level of instruction and assessments. In some cases, the decision about knowledge taxonomies may be considered a state decision. For example, in New Hampshire, the state selected Webb's and uses it as a foundation in creating a system of performance-based assessments.

As teachers become more comfortable with competency education, there will be more and more discussion about depth of knowledge. Rose Colby, a competency-based learning and assessment specialist, points out, "In many districts, teachers begin to realize they are not assessing at higher levels of knowledge. They begin to build their assessment literacy as well as create more performance tasks and assessments. Some realize that even though their assessments may be at higher levels of rigor, their instruction isn't. Thus the knowledge taxonomies create the conditions for a cycle of learning for teachers."<sup>23</sup>

**With clear learning goals, teachers have flexibility in how they teach.**



## Exhibit 6: Knowledge Taxonomies

### BLOOM'S TAXONOMY – Original (1956)



### REVISED BLOOM'S TAXONOMY – Anderson and Krathwohl (2000)



### WEBB'S DEPTH of KNOWLEDGE (1997)



### NEW TAXONOMY on EDUCATIONAL OBJECTIVES – Marzano and Kendall (2007)



#### b. Structure and Characteristics: What are the units of learning and how are they organized?

The structure of the units of learning is the spine of the competency education system, enabling transparency and alignment between standards, instruction, and assessments. It has also been referred to as the “blueprint for personalized learning,” as the explicitness and transparency of the learning objectives allow teachers and students to create highly personalized learning experiences. It is by having a unified, transparent system of what students are expected to demonstrate in order to advance that schools, teachers, and students can have the freedom to use different instructional approaches and ways to demonstrate learning. In competency education, with its emphasis on transparency, this becomes even more important. Students and parents are going to know when an assessment is assessing something beyond the standards and the curriculum. Some districts use the Common Core and state standards after rewriting them in user-friendly language. Some narrow the number of standards by focusing on the power standards, while others expand the structure to include bridging standards for even more specificity about what students will need to succeed in mastering a standard.

RSU2 and Lindsay have developed a three-level structure of [overall competencies, measurable topics, and learning targets](#) with the support of Marzano Research. Forming clusters of standards, or learning targets, into measurement topics focuses instruction and assessment and creates a “vehicle for learning” that teachers can use to keep track of the progress of individual learners.

Measurement topics clearly identify the level of knowledge that students need to be considered proficient. Students are expected to reach the designated level of knowledge to be determined proficient. Levels of knowledge are not synonymous with rigor. A student memorizing the alphabet is working hard at Level 1. However, as skills are developed, it is likely that the appropriate level of knowledge is Level 3 or above. Level 3 is what the [New Taxonomy](#) (Marzano & Kendall) would refer to as Analysis, including Matching, Classifying, Error

Analysis, Generalizing, and Specifying. Level 4 is considered to be Knowledge Utilization, in which students apply the skills in ways beyond what was taught in the classroom. All Level 3 knowledge and skills are formally assessed, scored, and reported, whereas Levels 1 and 2 may be tracked but not formally assessed when they are steps on the way to Level 3.

At this point in the development of competency education and the availability of technological tools to support it, there is little consensus about the level of granularity that should be used in organizing and assessing standards. Smaller learning targets may be easier to assess and provide students with a sense of progress. However, there is concern that the number of standards and the degree of granularity is unmanageable within the current budget and time designated for schooling. This line of thinking argues that teachers need to spend time on assessing at larger units of learning rather than every standard because it keeps the focus on the most important skills and creates the opportunity for deeper learning.<sup>24</sup> For example, at Sanborn Regional School District, competencies and essential standards are equal. Teachers design units based on Understanding by Design to identify the most important anchor standards and write them as “I can” statements. By focusing on the anchor standards in this way, they reduce the chance that the vast number of standards (kindergarten alone can have as many as 100) will become overwhelming.

Some suggest that it is the creative tension generated from holding ourselves accountable to teaching students the standards with greater granularity that will create the conditions for innovation, forcing us to seek other ways of organizing learning so students can learn more within the current frameworks, budgets, and timeframes. Certainly, with greater technological solutions designed for the competency-based classroom, we can imagine that one day teachers will be able to assess and track student progress in real-time.

A second decision related to the structure that districts make is how they are going to talk about academic levels as being different from grade levels. If you are going to break the link with advancing students in age-based cohorts, regardless of their level of learning, then what type of language and construct do you need to determine advancement upon mastery? Most districts retain age-based grades for a number of reasons—parents are used to it, there are developmental issues that are logically related to age regardless of academic learning, there are some disciplines in which students can work together without concern for their academic levels, and there is a social context to learning, with students eager for a sense of belonging. Certainly, in high school there are a number of developmental benchmarks (getting a car, prom, and graduation) that are traditionally based on age.

Districts have organized academic levels in a number of ways. Some have the same number of academic levels as grades. Some have tried to create approximately two academic levels for any grade level to differentiate between the two as well as provide a greater sense of progress for students. Some use the Common Core academic levels for ELA and mathematics but organize social studies and science in age-based grade levels. As described previously, Chugach School District created a unique set of ten levels with very specific determinations for graduation requirements. Adams 50 in Colorado tried organizing academic levels so there were two for each grade level, but returned to alignment of academic levels to grade levels after finding that a separate structure of academic levels created confusion among parents. Now if a sixth grade student is reading at level 7 but doing level 5 math, parents have a very clear sense of how their students are doing.<sup>25</sup>



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- If your culture of learning is strong, students will be comfortable talking about their grade levels and academic levels even if they are on academic levels below their grade level. Pay attention to language about progress—emphasize efficacy, depth of learning, and working harder to tackle challenging material rather than falling into the trap of referring to students as fast or slow.
- Create an innovation opportunity for your organization by engaging a discussion around the questions, “What would your school look like if you did away with grade levels? How might you organize and flexibly group students? How might you deploy teaching staff differently?”

### c. Developing a Continuum of Learning: How will content be organized within the structure?

Once a district has established what the structure will be, the next step is to organize the content areas or domains into the structure or a continuum of learning. The task at hand is to create a learning continuum for each domain that has been determined as important to graduation expectations, stretching from K through 12, with a clear indication of what it means to advance upon mastery. In thinking about the definitional elements of competency education, this is where districts create a transparent set of explicit and measurable learning objectives and a system of assessments that are designed to advance student learning.

The process of developing the learning continuum, defined as an aligned set of standards and rubrics, can be designed as embedded professional development. Working in groups, teachers unpack standards, share student work, and write the standards in user-friendly language. While a vital step, this can also become an overly iterative process when the focus turns to getting every word right rather than building a shared understanding, holding deep conversations about learning progressions that describe how students move from one concept to the next, and building assessment literacy. Schools may develop and review rubrics simultaneously or as a subsequent step. (The topic of rubrics and calibrating the determination of proficiency is discussed separately below.)

Much of the conversation in preparing learning continuums will be in the context of the specific discipline. Jeni Gotto of Adams 50 explained that in a competency-based school, it makes a difference when teachers really understand the content discipline. They aren't teaching ninth-grade curriculum anymore, they are teaching teenagers who may be at different places along a learning continuum. Teachers who can teach students at their grade level and diagnose why students are struggling are going to see their students make progress. Teachers with deep content knowledge will be valuable in determining which standards are worth tracking because they are pre-requisite skills for more advanced learning, rather than trying to track student progress on every standard.

Danielle Harvey, Dean of Instruction at Pittsfield, believes that writing competencies is primarily about communication. The personalized learning structure they've implemented helps both teachers and students recognize when the student isn't “getting it,” thereby opening the doors for next steps. This kind of transparency carries over to the competency-based structure itself. Harvey recommends that schools should have an implementation plan and not try to tackle everything at once. There will always be refinements in improving and aligning competencies, rubrics, and assessments. For example, Pittsfield started with the standards they had rather than trying to operate on a blank slate. They relied on the Understanding by Design model to support teaches in identifying the essential learning components and designing a structure that would help students learn. They also found it helpful to make a distinction between closed competencies that are more time-bound and open competencies that might require a year to develop.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Districts should set the goal as creating continuums of learning across elementary and secondary schools, not just as segments for each grade level. It is important to think about vertical alignment. Once teachers have organized the learning continuums, be prepared for frustration that curriculum isn't designed well for the competency-based classroom. Publishers create curricular resources on specific grade levels, with different products for elementary, middle, and high school. Thus, a teacher in seventh grade trying to teach students with gaps at the fourth- or fifth-grade level may not have any resources within the middle school curriculum or be familiar with the elementary school curriculum. As a partial solution, Adams 50 turned to an open source curriculum, Progressive Math Initiative from the New Jersey Center for Teaching and Learning.
- Even though learning continuums may be organized in sequence, that doesn't mean students have to learn in a rigid linear fashion. There are some standards that are prerequisite for another and need to be taught sequentially. However, if teachers are using worksheet after worksheet in their first year of implementation, it is likely they need some help to transition to a personalized approach that creates more engaging learning experiences and embeds student choice into unit design. As teachers become more comfortable with the flexibility enabled by competency education, it is likely they will begin to use more creativity in how they design units.

### **d. Rubrics and Calibration: How will you know students are learning and what they need to reach proficiency?**

As districts are designing the structure of learning, they are also thinking about assessment. Doug Penn points out, "We need to always know the purpose of assessment. It is to help students and the teacher understand what students know and what they don't know, and to provide insights into the steps that are needed to learn it. Too often, assessment is used as a hammer and a gateway. For us, we see it as a process of helping students get from don't know to knowing."

Thus, as teachers develop the learning objectives, they also consider how they will structure rubrics to provide meaningful feedback as well as determine that students have met appropriate levels of knowledge. The process of creating norms about what proficiency means at each unit of learning and determining when students should advance to the next academic level depends on four things: clear criteria or rubrics, calibration, assessment literacy, and quality control mechanisms. In the initial years, the primary focus tends to be on rubrics and calibration. Districts and schools invest in strengthening assessment literacy, specifically building capacity for formative and performance-based assessment, and design quality control mechanisms at a later date.

### **Rubrics**

In the early days of the transition to competency-based education, many schools continue to rely on students taking tests and getting a number of the answers right. Over time, however, they increasingly turn to rubrics that provide more in-depth insight into how students are advancing toward proficiency. There are many ways these are structured—some indicate progress (emerging, proficient, beyond proficiency), while others are highly aligned with the knowledge taxonomy (recall, comprehension, analysis, knowledge utilization). Teachers may also take the language and create their own variations with student-friendly language or engage their students in creatively naming the levels of the rubric.

Given that grading systems are often developed on the backs of the rubrics, it is important to think about how parents will understand the language, as well. At Memorial Elementary School in the Sanborn Regional School District, they found the process of developing a system of grading and assessing was best described by the Goldilocks story, in which they had to search to find the perfect fit. At first, they moved from the 100-point scale to a four-point rubric, which included E (Exceeding), M (Meeting), IP (Inconsistent Progress), and LP (Limited Progress). However, some of the terms carried negative connotations, and most parents made a mental link between an E and the traditional A grade, even though the school considered M to be the goal and E to be a demonstration of rare and exceptional work. Over time, they had to adjust the letters to align better with what parents were able to understand and accept. They now rely on E (Exemplary), P (Proficient), IP (In Progress), and LP (Limited Progress).<sup>26</sup>

### Calibration

Calibration is one of the core processes to ensure that competency education consistently produces higher achievement while also addressing achievement gaps. Without calibration, it is unlikely that your I&A model will be effective in ensuring all students are reaching proficiency.

The process of calibration (also referred to as norming, moderation, or tuning) is a conversation among teachers about student work and building agreement about proficiency. This is often done within PLCs. Over time, principals will want to organize opportunities for vertical and horizontal alignment within their schools while districts seek to build consistency across schools. This is an ongoing process, and larger districts will need to think more deeply about how to create ongoing mechanisms to ensure consistency and rigor across the district.

At Memorial Elementary School, a “writing wall” has been developed to enable teachers to develop a shared understanding of what grade-level writing looks like. Over a three-year process, the teachers at Memorial have devised a system to analyze student writing as a cohesive staff and with a focus on all grade levels at once. By making a large table that contains every student’s writing and progress and placing it in a school-wide continuum, they are able to cluster data by grade level, by classroom, and by individual child growth. In this way, the entire staff can dissect results and come up with vertical teams to address strengths and weaknesses and share best practices. Currently, Memorial is also working to strengthen assessment literacy, specifically related to performance assessment, as part of its participation in New Hampshire’s PACE initiative to design a statewide performance assessment system.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- In the early stages of implementing competency education, teachers will begin to recognize that they are teaching and assessing at levels of recall and comprehension rather than higher levels. This may cause frustration, disappointment, and even a bit of shame. This is an important point to instill the culture of learning—helping teachers to recognize the value of a transparency system, collaboration, and learning from mistakes. This can also be a place to develop teacher leaders who embrace the mantra of “doing right for our kids” to help move past the frustration, turning it into a drive to do better.
- Great professional development can take place when teachers talk about student learning, instruction, and assessment as they design and refine the learning continuum. However, watch out for constant re-writing of standards and rubrics. It is easy for this to become a bureaucratic process

rather than one focused on teaching and learning. Make sure teachers are spending time looking at student work, talking about what proficiency looks like, and building their assessment literacy. Manage refinements of documents on an annual basis so that it doesn't take up too much of teachers' precious time together.

#### **e. Habits of Learning: What are the skills students need to manage their own learning, and how are they developed?**

Creating empowered students isn't about moving them through a curriculum. It requires schools to organize their learning experiences to help students build all the skills (referred to by many terms, including habits of learning) to become independent learners ready to pursue college and careers.

In order to separate out academics from behavior in the grading system that indicates how students are progressing in reaching proficiency (i.e., a progress monitoring system), competency-based districts and schools must establish a set of skills or behaviors that are important for learning or are needed for college and career readiness. For example, at the Sanborn Regional School District, teachers have learned that assessing behaviors in elementary school students is an important step in helping students make academic progress. The Responsive Classroom CARES (Cooperation, Assertion, Responsibility, Empathy, and Self-Regulation) project focuses on developing work-study habits early on.

The most advanced competency-based districts have discovered that these skills and behaviors are in fact an essential element of creating student agency and improving academic achievement. They are beginning to think about what the habits should be developmentally and how they interact with efforts to address social-emotional learning and the school culture.

Helping students stay on a meaningful pace toward graduation goals, regardless of their grade and academic levels, requires attention to students' strengths in the habits of learning as well as adequate coaching from teachers. Jaime Robles explains Lindsay Unified School District's approach as, "Our lifelong learning competencies have been developed around our strategic design for graduate outcomes. We have created a school-wide focus on progress. This starts with frequent check-ins. We do not wait until the end of the semester; we are constantly checking. We review learner progress and indicate whether they are at a 3 (on pace), 2 (indicating they can catch up), or 1 (indicating that the student needs additional support). However, we do more than look at learner pace, we are also reviewing their scores in lifelong learning and seeing what areas need to be addressed and supported by learning facilitators or in advisories."



### **LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES**

- Only after defining the knowledge taxonomy, structure, and continuum of learning should districts seek out the Learning Management Systems and digital infrastructure to support learning. Some districts make that decision too early and are then constrained by the existing product architecture. It will help to include the chief technology officers and/or technology department in the early conversation around structure and the learning continuum so they can understand the vision and begin to seek out potential technological solutions.

- Districts and schools can save time by adopting approaches developed by other schools or working with vendors. However, invest time and resources to support the process of calibrating the determination of proficiency, as it is part of the process for creating a competency-based system. The process of creating the I&A model can also help educators shake off the beliefs of the traditional education system and embrace the assumptions underlying competency education.
- Also remember that the work of developing the I&A model is never fully completed in the first attempt. Even the most developed competency-based districts tend to have some but not all of this in place, or they are continuing to refine. Thus, it's best to think of this as a work in progress. It's a meaningful process for educators to unpack the standards, think about the level of knowledge, turn it into user-friendly language, and discuss how they would know if a student had mastered the skill or content. Make sure that realistic goals are set. Learn as much as you can from other districts so that not everything is built from scratch.

## D. Forging Policies and Operating Procedures for Personalization

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*Our goal at Making Community Connections Charter School is to develop graduates who are empowered with the knowledge and skills to use their unique voices effectively and with integrity in co-creating their public global world. This is, in effect, our One Big Competency.*

– Kim Carter, QED Foundation

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If a district puts into place all the pieces described above, they will be well on their way to creating a strong standards-referenced system—but not a student-centered one. The new value proposition is based on an integration of personalized learning that takes into consideration students' needs, interests, and aspirations along with a competency-based infrastructure focused on proficiency, pace, and progress.

The following discussion is on the policies and procedures that need to be in place to ensure that the system you are implementing has students and their academic success—not the standards themselves—at the center.

### 1. Student Agency

Personalization and student agency go hand in hand—it is nearly impossible for teachers to manage a personalized classroom if students are constantly turning to them for direction. Thus, as schools move toward personalized, competency-based education, they will also want to create the conditions for students to take ownership over their education (i.e., student agency). There are a number of essential ingredients required to create an environment and learning experiences that help students build the skills they need to have agency: a school culture that is grounded in a growth mindset, strategies to help build habits of learning, opportunities for choice and co-design, transparency of learning objectives with well-developed assessments, and high levels of teacher autonomy.

As schools commence on the journey toward competency education, they are likely to find themselves thinking more and more deeply about the implications of student agency in practice, operations, school design, and policy. Below are three areas that schools will encounter and want to begin to create policies, guidelines, or operating procedures for.

*How are you going to develop habits of learning?* Habits of learning are an important ingredient in building student agency. Habits of learning cannot be taught only by talking about the habits—students must have the opportunity to develop, practice, and reflect upon them. Thus, districts will need to think about offering a mix of developmentally appropriate project-based and experiential learning opportunities. This may require thinking about the school calendar, changing the schedule, and/or committing resources to develop and sustain partnerships in the community.

Pittsfield School District has created a dynamic extended learning program that enables students to build skills, demonstrate competencies, earn credit from experiences gained outside of the school environment, and even partner with higher education institutions to gain college credits. These Extended Learning Opportunities (ELOs) integrate with the competency-based structure by connecting the learning experience to core content areas. Each ELO is different based on student interest and the skills they are developing, but shares a commonality of involving research, reflection, and a presentation or project that links to the Common Core standards.

*In what way will you offer students voice, choice, and opportunities to co-design their learning experiences?*

The transparency of the learning expectations enables teachers to create choice about how students learn, the context of their learning, and how to demonstrate learning. It may be a discrete choice, such as selecting which animal to investigate when looking at an aspect of biology or selecting which poet to learn about in English. In many cases, teachers provide options with the caveat that students may suggest alternatives. Choice in how to demonstrate learning will require schools to have well-developed rubrics that focus solely on the specific skills to be assessed so that students may submit written materials, presentations, or more creative products such as a play or 3-D model to demonstrate their learning.

Rose Colby has observed that teachers are changing some of their practices for unit planning to provide more of this kind of choice. In the teacher- and time-driven practices of the traditional education system, teachers often spend Fridays going over their plans for the next week's curriculum. In a personalized, competency-based environment, this curriculum serves as a basic roadmap, but teachers make room for flexibility. This way, when students raise unexpected issues, want to explore an area more deeply, or simply need additional learning support, there is room already built in. As Colby explains it, "There is a resiliency that develops in order for educators and administrators to respond to student agency in the moment."

**Transparency  
empowers students  
to have voice  
and choice.**



Schools are also creating opportunities for students to co-design their learning with teachers. This entails creating the structures for students to identify areas of inquiry and then organize the learning goals as defined by the standards and habits they intend to fulfill. The I&A model becomes a common language that allows students, teachers, and any partners in the community to discuss the projects and learning expectations.

***What are the skills and autonomies teachers need to nurture student agency?*** Teacher autonomy and student agency go hand-in-hand. In order for teachers to be able to be responsive to students' learning, they need to be able to have some degree of autonomy in terms of pacing and their professional judgment. Kim Carter notes, "Teachers need to know how to manage motivation—when to push, when to pull, when to pause. They need to know how to give feedback that helps students navigate the gaps between where they are and where they are going in terms of their learning targets. Equally importantly, teachers need to know how to solicit and receive feedback *from* students about which instructional practices are helpful and which aren't. One of the most important skills for teachers to nurture in themselves and in their students is metacognition."

Don Siviski, previously the superintendent of RSU2 and the Maine Department of Education's Superintendent of Instruction, currently at the Center for Secondary School Redesign, spoke on this point with, "Everyone in the education system has to model 'agency' and the empowerment of others. The superintendent has to honor agency with principals, principals with teachers, and teachers with kids. Remember—kids learn from what we do, not from what we say."

Most importantly, districts and schools need to think strategically about what supports teachers need to help build student agency. Most teachers have not received training about assessing or helping students to build strong habits of learning. They will need support in learning how to manage a personalized classroom rather than a teacher-driven one. Some teachers may find themselves outside their comfort zones when trying to empower students or discover they don't possess adequate assessment literacy needed to manage a wide range of choice in how students demonstrate learning.

## **2. Levels, Pace, and Progress**

Districts will need to develop a set of policies or guidelines regarding pace. The function of keeping students learning at a meaningful pace (as compared to delivering curriculum) is one of the most important and challenging aspects of the conversion to competency education. As a field, we have yet to create new language, concepts, or metrics that help us understand pace and progress. As you consider the following questions, understand that you are on the edges of the frontier.

***What academic level are students?*** As students enter a competency-based school, teachers will need to know their academic levels. Some schools do formal assessments using an array of formats. Some turn to one assessment system, such as NWEA Map or Scantron. Others have found that this can be off-putting for students, and look to teachers to use their professional judgment in leveling students. Teachers continue seeking understanding of the skills and knowledge students bring into the classroom by using pre-assessments to assess what students know or don't know so they can respond more quickly to students who need extra help.

***What is a meaningful pace?*** Flexibility in pace and pacing is one of the most important concepts in competency education and also one of the most challenging. Kim Carter explains, "One of the most significant distinct aspects of a personalized competency-based system is the ability to adjust pacing to meet every learner's needs. This shouldn't be construed to mean that each learner gets to set his or her own pace. At MC<sup>2</sup> we rely on

‘negotiated pacing with gradual release.’ This is an integral aspect of developing student agency and the central role of managing motivation in an educational system designed to create proficiency not just in facts and skills, but in habits and dispositions to be critical thinkers and lifelong learners. Determining progress is very clear in a competency-based system because of the transparency of the learning objectives. Pace is the progress (amount of learning) divided by an amount of time. Depending how a district has developed their academic levels, competency-based schools can determine the expected annual rate of learning.”

The term *pacing* is sometimes used to talk about the planning and supports needed to help students make progress. When learning is a constant and time is a variable, more instructional supports and more time on the part of the student and teachers will be needed when students are not “keeping pace.” If pacing is not adequate, schools need to engage students and their families, seek out additional resources, or plan for more time for the students to make adequate progress. If there is an issue at play that is preventing the student from advancing at an adequate pace, then individual plans can be created.

The issue of pace, progress, and pacing is made more complex by the fact that students in the same grade may enroll in school with a difference of two, three, or even more academic levels in their skills. Thus, one student may not yet be proficient but learning at a more rapid pace than the student who entered on academic/grade level. Schools develop individual plans to support students who are substantially behind academically, setting a path to keep them on a pace that makes sense for them.

***How will you ensure consistency in determining students have acquired the level of proficiency to advance to the next level (i.e., quality control)?*** Districts will need to decide how students are determined to be ready to “advance upon mastery.” Is it based on units, courses, academic levels, or major benchmarks such as the transition into high school? In many cases, the authority to credential students rests with teachers. The performance-based system at Chugach School District has developed over time, with the district taking responsibility for ensuring students are proficient before advancing to the next level by relying on cumulative assessments. Teachers have autonomy and use their professional judgment to determine proficiency within levels. At Making Community Connections Charter School, teachers and students determine when students are ready for the four gateway performance assessments of which the last one is graduation. Students prepare a portfolio and present to a review panel that includes community members.

Some schools that convert to competency education find that after leveling, they have many secondary school students who are two or more academic levels behind their grade levels. This same situation exists in the traditional system, but competency education makes it explicit and demands a response. Schools are using a variety of techniques, including ninth grade academies, creating a schedule where students spend time building their foundational skills, after-school tutoring, and adaptive learning that provides rapid feedback. Adaptive software can be very helpful when students have foundational skills but lack fluency. Teachers can then focus their attention on working with students on higher level thinking skills while students continue to strengthen their skills with digital support. Schools may also set the expectation that middle school students will need to strengthen reading, writing, and mathematics before entering high school, assuming it makes sense developmentally. In partnership with students and parents, plans may be developed for how students will advance on an individualized plan that may depend on a steep learning trajectory to graduate with their cohort or plan for an extended graduation date.

***How will you monitor and communicate student progress?*** Transitioning from traditional A–F grading and the 100-point system to monitoring and communicating student progress is one of most important implementation

steps—and one that is loaded with pitfalls.<sup>27</sup> Many districts start off with a hybrid model, attempting to join a standards-referenced system with the elements of the grading system that are most well-known by teachers and students. Over time, however, this can cause ongoing headaches. One teacher at Sanborn High School described this dilemma, “If you are going to be rubric-based, then you have to have a rubric grade. Trying to marry the 100-point scale to rubrics doesn’t work. The 100-point scale just has to go away. It’s a hindrance.”

At the high school level, it may be harder to break away from traditional grading because the point system is the basis of the GPA. Using a hybrid grading system may make it even more difficult to create a shared focus on learning, as some students will be more focused on how points are distributed than learning. Be prepared to engage educators, students, and families about the limitations of the traditional grading system for “college-bound” students, in that they may have a high GPA within their own school but still not be college-ready or competitive on a national or international level.<sup>iii</sup> Make sure you offer ways for students to advance beyond twelfth grade skills and build an academic résumé through deeper learning projects that will help them in the college admissions process.

Even with these precautions in place, parents and students will naturally worry about competency-based grading and college admissions. Thus far, this has not been a problem, as colleges are used to receiving a wide variety of transcripts. In general, schools should prepare an attachment that explains the school and its grading process. Great Schools Partnership has engaged college admission officers in the New England region to ensure that there are no obstacles. To date, fifty-five colleges, including the public university and community college systems, have agreed to accept proficiency-based transcripts.<sup>28</sup> Worst case scenario, schools can translate back into the point system if needed.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Conversations about grading among educators are an opportunity to look at the underlying assumptions of the traditional system and how it compares to research on teaching and learning. Is competition really motivational? What are the implications of adding or deducting points for behavior? What are the implications and reasoning for advancing students to the next course or grade level without adequate skills?
- Once districts establish the level of proficiency for learning objectives based on a knowledge taxonomy, the question arises of what “beyond proficiency” means. It doesn’t mean advancing to the next standard, as a separate rubric would be used. It doesn’t mean extra credit or extra points. So what does it mean? This can lead to a rich conversation about what happens when students reach proficiency: creating opportunities for working on further application, creating capacity to advance to the next level, or going deeper.
- Guard against language of students being “fast learners.” It is a red flag for two different reasons. First, it is possible that students are not being offered enough opportunities for deeper learning, which generally takes more time. They may be fast only because the level of knowledge is closer to recall and comprehension than it is to knowledge utilization. Second, the term “fast learner” implies a fixed mindset—you are or you aren’t. To keep your culture of learning robust, focus on effort rather than comparison.

<sup>iii</sup> According to an [international study by the Education Testing Service](#), American millennials (those born between the 1980s and early 2000s) are lacking literacy, math, and problem-solving skills.

### 3. Not Yet Proficient

The phrase “not yet proficient” illustrates how competency education shifts the focus to students and their needs. Students are not going to be passed along without adequate skills. Instead, schools will continue the instructional cycle with students who are not yet proficient until they are successful. Brian Stack reflected on the experience in Sanborn by stating, “In a competency-based school, the bar is getting raised. For the first time, we expect students to understand and be able to apply the curriculum. At first, teachers were worried about a higher failure rate. But that doesn’t happen because of our design to provide intensive support to students during the ninth grade, the combination of students taking more responsibility for their learning, and structuring adequate level of supports into the school day and year.”

*When and where will students be able to access additional supports?* All students, whether in AP physics or at an academic level lower than their grade level, will struggle with material at some time or another. The most important thing schools can do is offer daily flex time for students to get the help they need, when they need it. It is not sufficient to rely solely on after-school or lunch periods—dedicating time for getting help reinforces a school culture that sometimes it takes extra effort and asking for help to be successful.

At Memorial Elementary School, teachers found that they had to build greater flexibility into their lessons and units to respond to students who needed more time. The school created LEAP (Learning for Each And every Person), a time scheduled each day for students to get help through re-teaching, reinforcement, or enrichment. As they realized the amount of extra support students needed, they began to use student data as a starting point to search out root causes. For example, teachers realized that they had a curriculum problem in fourth grade that was creating a wider skills gap. In the short run they strengthened word study, and in the long run began the ongoing conversation that revolved around, “What do you do when students aren’t reading well?” This conversation opened the door for collaborative efforts to better serve students needing help with phonics.

The common language of the I&A model can improve the effectiveness of systems of support as well. Teachers at Gonic Elementary School in New Hampshire’s Rochester School District found that their tutoring program was greatly enhanced by being able to use the standards to focus in on specifically where students needed help. When tutors felt that students had become proficient, students were able to bring back evidence of their learning to their teachers.

Online curriculum that can be designed to be highly modularized can be very helpful in helping students target specific areas of weakness. New Hampshire’s open-enrollment online school, Virtual Learning Academy Charter School, offers competency recovery that can be made available to students the minute they are having difficulty. Jane Bryson of Education Elements suggests selecting a portfolio of two to three types of providers that students can turn to when they need support based on what works best for them. Students should know that when they are struggling with a concept, they can turn to a provider like Khan Academy for a quick tutorial video or a more interactive step-by-step provider like I-Ready. Another useful strategy is the flipped classroom approach of teachers recording themselves giving a mini-lesson using videos that students can watch as needed. Bryson goes on to recommend that students be offered choices to come at concepts from different angles. It may be that they find one tool more effective than another, which builds awareness about their learning process and increases their ability to make better choices for themselves as learners. However, it’s important to note that, to date, there are more digital content options in math and literacy than in other subjects that support this type of student usage. When selecting digital content, it’s imperative to understand how students can navigate material in competency-based environments before making final selections.

*How can districts support the transition to high school for students who may be behind?* Some schools are beginning to invest in time upfront rather than waiting for students to have troubles. At EPIC Schools, an

initiative of the New York City Department of Education, ninth grade students participate in a three-week session before school starts to address habits of learning, build a sense of community, and brush up on basic academic skills. Harvey Chism explains, “We wanted to help students prepare for taking ownership of their education. Unfortunately, many have been used to a culture of compliance and were subject to punitive disciplinary policies that undermine their motivation, engagement, and learning. We wanted to work with our students closely to build their self-awareness, ownership, and efficacy as learners. Relationships are invaluable to the risk-taking and persistence involved in competency-based learning environments. Therefore trust, confidence, curiosity, and belonging must be called out and valued as factors that inspire and support learning.”

Sanborn High School created a transition year for ninth graders, assigning them to an interdisciplinary [Freshman Learning Community \(FLC\)](#) of five teachers, a literacy coach, and a special education teacher. Teams of teachers operate as a PLC, with a great deal of autonomy to respond to the needs of their students in their learning community. They focus on data about student progress to make sure students are getting what they need to be prepared for the transition into high school. When students aren’t making progress, teachers immediately intervene to find out what is happening. Essentially, Sanborn has created a structure in which a team of teachers is responsible for ensuring that each and every student gets off to a good start when they enroll.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Schools will find that the areas in which students struggle also provide feedback about where educators can build up their instructional skills. In some schools, teachers are turning to the research based on learning progressions “rooted in coherent and well specified conceptions of how students’ knowledge and skill in particular subjects should develop over the school years”<sup>29</sup> to help them better understand how students move from one conceptual idea to another.<sup>30</sup>
- District and school leaders should pay close attention to the language and procedures used to describe what happens when a student doesn’t reach proficiency. Educators use a variety of terms, including re-teaching, re-assessment, re-take, and competency recovery, while others see it as a continued cycle of instruction that doesn’t end until the student reaches proficiency. Some of the differences in terminology are based on whether teachers are giving scheduled assessments, such as a test to the entire class all at the same time (thus some students need to have a re-assessment), or if the classroom is more personalized with just-in-time assessment when students have shown evidence that they have reached proficiency.

### 4. Advancing Upon Mastery

Eventually competency-based schools will want to create the capacity for students to be able to immediately advance upon mastery. Although most schools aren’t ready to address this in their first year, this will be an eventual point along the path. It may start by enabling students to move onto units within a course, the next level of study, or to the next grade level. Online and blended learning can be invaluable for creating just-in-time learning so that students can advance beyond the “teacher pace.”

Issues may develop if students are learning at levels beyond their grade level and the expertise of the teacher. Schools find that frequent grouping/regrouping can be beneficial for students to advance beyond their grade level. The A La Carte model of blended learning can be particularly helpful for students who are advancing well beyond their grade level but want to stay with their peers. Finally, dual enrollment college courses allow students to remain with their peers in high school while advancing academically.

## E. Empowering Teachers

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*At Sanborn, we believe that great leaders are not great because of their power but because of their ability to empower others. Administrators at the district and school level worked shoulder to shoulder with teachers as we became a competency-based district. Our students have benefited as well as our teachers. We have developed a cadre of teachers who are always seeking to build their expertise in instruction, assessment, grading, and technology. We are drawing on the collective expertise across the district as we constantly improve our ability to support our students.*

– Ellen Hume-Howard, Director of Curriculum, Sanborn Regional School District

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In competency-based schools, a collaborative and empowered cadre of teachers is the engine that drives learning. Student learning depends on a strong adaptive instructional cycle that, in turn, depends on skilled teachers using their professional judgment that, also in turn, depends on the structures and cultures of the organization. Missy DeRivera, a homeschool teacher at Chugach, explained, “The leadership question is always central to our work. Is this best for kids? That is at the core of our entire district. We identify what is best for kids and then we figure out how to make it happen.”

### **1. Strong Professional Learning Communities**

It is difficult, if not impossible, to build the calibration mechanism that is essential for competency education to be effectively implemented without strong professional learning communities. It is also an ingredient for an empowered cadre of teachers. Sanborn Regional School District placed PLCs as core to operations right from the start. Their administrative team recognized that reorganizing in the district would require an investment of time, and opted for Professional Learning Community meetings over weekly informational staff meetings. As Ellen Hume-Howard, Director of Curriculum and Instruction, stated, “Doing this has been challenging and the administrators have worked hard at communicating to staff in other ways, but we believe PLC time is important and our calendar reflects this belief.”

Jonathan Vander Els, Principal of Memorial Elementary, emphasized that one of the principal’s most important leadership functions is to support PLCs, making sure they have the time to meet and are staying true to the norms that allow them to be a source of collaborative, professional development. “Principals and district leaders have the power to make sure there is freedom to have hard conversations in safety,” he said. “It starts with distributed leadership models that understand and value teacher leadership in creating a dynamic learning culture within the school.”

### **2. Aligned Human Resources System**

Soon after converting to competency education, many districts find that they need to modify their human resources operations, including hiring, orientation, professional development, and evaluation.

#### **a. Hiring and Orientation**

Competency education is changing the way districts think about hiring. In the traditional model, they searched for teachers who had experience in teaching the curriculum for a specific grade. “Now we look for teachers

who are interested in teaching students and know the discipline so they can help students who are in different places along their learning progressions,” explained Ellen Hume-Howard. Doug Penn, Districtwide Principal at Chugach, emphasized this with, “We don’t hire teachers, we hire members of a team. We don’t want people to compartmentalize.”

At Lindsay Unified School District, the hiring process is more robust now than it has been in years past. Prospective employees are introduced to the model ahead of time to gauge their interest, and the final step is an in-depth conversation with the principal regarding the district philosophy. “We always empower our staff,” said Jaime Robles, “so we need to make sure we hire individuals who share our belief systems on how students learn and what motivates them.” At Sanborn, much of the orientation takes places within PLCs, while new teachers at Pittsfield are assigned a mentor to help them align competencies, rubrics, and assessments, as well as learn how to manage a personalized classroom.

### **b. Professional Development**

In the well-developed competency-based districts, student learning is the driving force behind professional development. Teachers pursue opportunities that build the skills they need to be more effective in helping students to learn and to pinpoint those areas where learning isn’t yet taking place. Professional development takes place within the classroom as teachers use formative assessment to inform their own instruction. It takes place within PLCs and in designing individual professional development plans. When teachers work together collaboratively, knowledge is constantly being exchanged. The ongoing process of calibration and discussion of student work builds assessment literacy so teachers are better able to provide feedback to students. According to Doug Penn, “Performance-based approaches encourage collaboration. Once we became performance-based, the teacher retention rates shot up. It helped us to create the conditions to pursue professional development.”

At Lindsay Unified School District, attention is also paid to educator learning through the development of a set of adult competencies. Rebecca Midles explained it as, “At Lindsay, we are growing mastery at all levels, supporting adults in the system as respectfully and as meaningfully as we support our learners in the K12 system.” The district’s work on adult learning is considered part of a continuum, not a static curriculum. The topics covered include focus areas such as leadership (purpose, vision, mindset, capacity building, and relationships), personalized mastery, instructional and assessment strategies, and data driven cycles of improvement. These adult learning opportunities are role-specific so principals can use this information to determine needs of their staff and highlight strengths.”

Exhibit 7 provides a quick look at the types of rubrics Lindsay is developing to support the development of the adults in the system—especially as it pertains to developing a learner-centered environment.

### **c. Evaluation**

Chugach has developed an evaluation system that reflects the organization-wide focus on learning. The staff development and evaluation process is remarkably similar to how students are assessed, in that it’s all about learning. It’s based on standards wherein staff provide evidence of their learning. The evaluation has several components, including self-evaluation; comments and observations from students, parents, coworkers, and community members; individual meetings with the administrative supervisor; development of individual goals and action plans; collection and presentation of artifacts to support self-evaluation; and assistance in meeting district goals.



The evaluation process feeds directly into a performance pay policy structured in alignment with the district's shared purpose and team spirit. The individual evaluation scores are averaged across the workgroup each year, and the average score is used as the multiplier for performance pay. Bob Crumley notes, "We've balanced individual improvement with incentives to support each other. While the score and the performance pay are significant, even more significant is the process of holding deep reflection-based discussions about our work; what is going well and what are our individual and organizational opportunities for improvement."

At Sanborn Regional School District, Superintendent Brian Blake expanded the evaluation system to focus on the domains of learning communities, student engagement, and climate and culture as well as classroom competencies focused on instruction. They continue to explore how to build in more formative assessment that can help improve practice and what it means for teachers to become master teachers when they exceed the standards of the evaluation system.



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- More advanced competency-based districts find they need to rethink teacher evaluation to be consistent with the organizational culture and guiding beliefs about learning and motivation. There are likely to be inconsistencies between the values and beliefs undergirding the personalized, competency-based approach and those informing the state teacher evaluation systems and state professional teaching standards. These are opportunities to engage state leadership as well as reflect more deeply upon and re-commit to the shared purpose and guiding principles focused on helping students learn.

### d. Autonomy and Creativity

Doug Penn suggests understanding the role of educators by thinking about "a triangle surrounded by an enormous circle of students' ever-changing interests and passions." In his description, the triangle sides are made up of a) the standards that define what students need to know, b) how they consider the assessment in the design process, and c) instruction that identifies how the students are going to learn it. There is ample room for creativity in this model, as it can be co-designed with students and act as an iterative process that takes time to fully align. "The opportunity for creativity can be intimidating," Jed Palmer, head teacher at Tatitlek Community School, adds. "We are open about it—it can be scary when you know you need to do better, but it's not exactly clear how... It may feel like a teacher is walking on a tight wire without a net, but our job is to not let each other fall off. It can be really rewarding." Thus, supporting teachers requires conditions that provide collaboration, coaching, and supporting professional development as educators.

Teachers in competency-based environments have significantly more autonomy than those in traditional schools to be creative in how they engage and design learning experiences for students. In return, they have the responsibility for helping students reach proficiency. Teachers often have the primary responsibility of credentialing students based on the demonstration of mastery of the learning objectives, although districts may have other mechanisms in place to manage quality assurance. Thus, teachers are often asked to use their professional judgment in facilitating student learning and progress, providing additional instructional support when needed, and credentialing that students have reached proficiency.

In describing how Chugach provides autonomy for teachers, Doug Penn explained it as, "You can't empower people by just saying it. We have to create the conditions for our teachers to succeed. We foster a culture where

teachers can find success through networks and structures, and where they have the freedom to work together to find solutions and make decisions. We also have systems in place. You need both a strong culture of learning and the systems to support it.”

## MANAGING THE PROCESS OF TRANSFORMATION

Any district involved in large-scale transformation needs to build its capacity to manage the change process. Several aspects of the change process that districts will want to consider in preparing for the transformation to competency education include:

1. **Decentralize District Operations:** In order to respond to the changing needs of students, schools require greater school autonomy. Increased access to data and responsibility in the hands of teachers means they must be able to use their professional judgment, and schools must have the flexibility to quickly respond to the needs of their students. In turn, this requires districts to shift their culture from compliance to support.

Structural changes within districts can clarify autonomy and accountability between districts, schools, and teachers. With well-defined competencies, learning progressions, and systems of assessments, there is greater autonomy on the part of schools, teachers, and students. It also makes sense at this time to explore changes in the structures and policies of finance, human resources, procurement, technology, building design, calendars, scheduling, and professional development around designing new school models. By maintaining open processes for identifying barriers and supports, school-level leadership can better manage school cultures in which both students and teachers are empowered.

2. **Define District Staff Roles:** As the locus of control shifts toward schools, teachers, and students, district staff will find themselves wondering what their new roles should be. In general, the shift will be one that moves from compliance to problem-solving, which will include listening to what the needs are, identifying common issues, engaging the appropriate stakeholders, providing differentiated support, and facilitating the development of competency frameworks and systems of assessments.

3. **Create an Overall Transition Strategy:** Leaders who have advanced through the transformation to a personalized, competency-based system describe the importance of starting with commitment first. This differs significantly from a pilot-first program begun with the hope that it will eventually scale. Districts commit to competency education with the understanding that they will have to make many mid-course corrections along the way.

Within the transition strategy, districts will also need to clarify accountability for managing change. Districts invest in a leadership team, building their capacity for project management, familiarity with how other districts are implementing competency-based models, and distributed leadership approaches. The team creates timelines, benchmarks, and metrics to hold themselves accountable. Embedding an iterative planning process so that problems can be quickly identified and resolved can be helpful in managing the change process.

Adapted from *Maximizing Competency Education and Blended Learning: Insights from Experts*.<sup>31</sup>

## v. Transitioning to a Competency-Based System

The transition year(s) is the period of time when people use the phrases “building the ship in the water” and “constructing the plane in the air.” Educators are doing double-duty setting up the new system while also educating students within the traditional system, which makes this a time of excitement, nervousness, challenge, and frustration. Below are a few of the major activities that districts undertake during the transition year(s).

### A. Preparing for the Leadership Lifts

*The scary part of this style of teaching and managing is that to empower someone you must give away your own power. Once we had a shared purpose of what we wanted to accomplish, I gave the power to the kids. Everything went smoother, and discipline problems went away. Of course, as an administrator, it's even scarier to give up power to teachers. When I first started to develop this management style, I was afraid I might lose all my credibility and authority. Then I realized I was just changing the source of my credibility and authority. And once again, everything went smoother.*

– Dr. Bob Crumley, Superintendent, Chugach School District

The leadership demands are high during the transition years—it is crucial that the culture of learning is reinforced, as teachers may feel that they aren't succeeding in either the traditional system or the new one being put into place. Moreover, as teachers begin to focus more sharply on helping students learn rather than delivering a curriculum, their own gaps in skills will become evident. Leadership will find that the shared purpose and guiding principles emphasizing learning and collaboration can become a shield to minimize the disruption caused by top-down policies that emphasize evaluations of individual teachers.

Oliver Grenham and Jeni Gotto of Adams 50 in Colorado warn that districts converting to competency education need to be ready for a “bumpy journey,” as it is impossible for everything to be perfectly designed. Their advice is for educators to:

- Start from where they are and prepare to learn and improve along the way,
- Think differently and help others think differently regarding student learning,
- Seek ways to better align the system as it progresses, and
- Remember the compelling purpose and the learners, and focus on the shared goal.

District leaders and principals will need to turn to the shared purpose and guiding principles to help make decisions both during the transition year and in the years to come. Virgel Hammonds, Superintendent of RSU2 in Maine, states that he is often asked about the Lindsay story (he was a high school principal in that California district) or the RSU2 story, as if there is a step-by-step process that other districts can follow. “It’s not about one method,” he says. “Every district and school has its own history and culture. They need to be able to tap into the assets of their communities and schools to develop the vision, guiding principles, and process that is right for them.”

One thing superintendents have to ensure is that decisions are being made in the best interests of students. Adult issues or traditional ways of doing things—contracts, bus schedules, and athletics—can easily drive decision-making if superintendents, districts, and school leaders aren't vigilant. With all the complexity of how schools operate and the incredible number of small decisions that need to be made daily, Hammonds warns that leaders can get stuck being a manager rather than a leader. Leadership is needed to take a step back and ask, "How is this moving our kids along their learning progressions? How is this providing learning opportunities that are meaningful to our kids?" Hammonds emphasizes that superintendents have to consistently role model how to make decisions in the best interest of learners.

In a culture of compliance, leaders rarely talk about courage. After all, educators don't need to if they are only following directives from above. In competency education, leaders often talk about their fears and the need to overcome them (i.e., courage). Leaders will describe the courage it took to give up power within a distributed leadership model. They describe turning to a burning desire to do better for children as the force that lifted them over the fear of failure.

It also takes courage to be honest about how students are achieving. In his presentations about the transformational process that Lindsay Unified School District has undertaken, Superintendent Tom Rooney found that district leadership had to have the courage to recognize that they'd betrayed students, parents, and the community by graduating students who did not have the skills to go to college. District leaders need to nurture courage in their teacher workforce, as well, as they will be the ones who will need to have honest talks with parents, often for the first time, about where their students are in terms of academic levels rather than in terms of completing assignments or behaviors.



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- Transition time is one of substantial discovery for the adults in the system—keep the focus on the growth mindset and celebrate learning. Teachers will often need time to unlearn practices before they can integrate new ones.

Meetings are the most important way to bring people together to discuss issues arising in implementation. Invest in building up the capacity of the organization to use effective facilitation strategies. Build a tool kit to create structures for process, input, and decisions depending on the purpose of your meeting—problem-solving, continuous improvement, or reflection.<sup>32</sup>

Consider placing a poster of the shared purpose on the wall of the conference room used for school board meetings and other decision-making groups. Point to the poster at critical decision-making points to ask how the shared purpose impacts the decision being considered. The practice will eventually transfer to other members of the school community and help you remain grounded in your shared purpose.

Meetings are also important in developing ownership for the new system. Make sure that input is acknowledged, addressed, and used. If leaders don't routinely ask for input and deliberately use it, it is easy for stakeholders to become discouraged. Each interaction is an opportunity for building trust...or not. Strategically communicate about who has offered input and how it has been used to build the new system. Share the credit.

## B. Selecting a Rollout Strategy

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*We discovered that in our rollout of performance-based systems, that although many of our learning facilitators were having rich conversations in small collaborative groups, we were struggling with systemic application. Learning Facilitators wanted instructional strategies, exemplars, and opportunities to observe one another. In response to this, we developed an instructional design and delivery coaching team to be at the site level to support and guide the work. This involves critical data based discussions, planning, role modeling, and goal setting, as well as feedback loops.*

– Lana Brown, Assistant Superintendent, Curriculum and Instruction, Lindsay Unified School District

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To date, there is no magic formula for how to roll out the conversion to competency education. Districts consider where leadership and enthusiasm is in place, where faculty is ready for the change, and where the most urgent need is based on academic scores. Adams 50 started with elementary schools, Lindsay started with the high school and has now rolled all the way back to elementary school, Pittsfield School District started with their Middle High School, and Charleston has started with a few of their elementary schools. At Sanborn Regional School District, significant elements of the effort began at the elementary and middle school levels and eventually progressed to the high school level. RSU2 asked faculty to vote whether they wanted to go forward before moving toward the transition after a year of inquiry and research. They then developed a rollout strategy to implement their learner-centered instructional strategies throughout the entire K–12 system.

In Chugach School District, district leadership clearly and publicly announced the direction, then each school developed their individual timeline. Some schools jumped in headfirst, while others phased in the new system over time, content area by content area. Along the way, each school shared successes and challenges, learning from each other, and eventually all realized they successfully achieved the same transition.

Fulton School District, neighboring Atlanta, Georgia, is using a multi-pronged rollout. They started by transitioning their summer school sites for middle and high school students from a traditional model to a competency-based model. This year, all K–12 summer school programming will be competency-based. In addition to being a cost-effective use of resources, teachers had the opportunity to see competency-based learning up close. They've also partnered with Marzano Research Labs and are developing and implementing proficiency scales, starting with K–12 Social Studies teachers. An additional partnership with [New Classrooms](#) brings the Teach for One math model to three middle schools within the district, which is already seeing positive results in improving progress and pace of students.<sup>iv</sup>

Districts and schools may want to have an even more discrete rollout strategy by beginning with a pilot. This can be helpful in identifying where capacity will need to be developed and anticipating issues. Jim Rickabaugh, Director of the [Institute @ CESA #1](#), describes a piloting process used by some of the schools in their Wisconsin network. When initiating a new practice, schools use a prototyping cycle within a finite period of time. If the benefits are significant, then a planning process begins to implement the practice school-wide.<sup>33</sup>

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<sup>iv</sup> To learn more about information management systems, see [Re-Engineering Information Technology: Design Considerations for Competency Education and Roadmap for Competency-based Systems: Leveraging Next Generation Technologies](#).

Based on the choice of rollout strategy, districts will need to think about the types and amount of support that will be needed. This may include training, coaching, and data collection to create a feedback loop to guide refinements. Students, parents, and teachers will all need to be prepared for the rollout.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Consider the capacity of the district and school leadership to continue to use shared leadership strategies during implementation. Once the rollout begins and the school moves into the transition stage, the leadership demands will only increase. Determine what types of supports will be helpful for district and school leadership during this period.
- Teachers need time to work with each other. As students build agency and teachers gain more authority and accountability, it is essential that they be treated with respect as professionals and have time to meet and plan. If a school can't find time for PLCs and common planning, then it isn't ready for the transition.
- When designing pilots, be sure to include some of the high leverage elements of competency education, including transparent learning targets, calibration among teachers, and ensuring adequate supports. Very small pilots that focus on a few discrete elements of competency education such as personalized pacing may not generate results, as teachers are using lower levels of depth of knowledge, operating in isolation without adequate peer support, or unable to meet all the needs of students for instructional support without an organizational commitment of resources.

### C. Preparing Teachers for Personalized Classrooms

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*As the navigators of learning, our role isn't to march students to their destinations, but to provide the feedback they need to get there themselves. While we try to keep them all on the path, we know that we will have some who will want to stop to smell the flowers, those who want to go the other way because they hate always being behind the pack, and those who try to convince the group to stop because it is a conspiracy launched by the adults to control their minds. Nothing works for all students. But if we know where we need to get them, it makes it easier to guide them.*

– Bill Zima, Principal, Mt. Ararat Middle School

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One of the necessary steps to ensure a district is creating a student-centered culture rather than one solely driven by standards is to prepare teachers for managing personalized classrooms. Pittsfield School District provided professional coaching courses for all their teachers. Don Siviski, former Superintendent of RSU2, describes eliminating all travel and non-related professional development in order to stop doing what wasn't working and marshalling all resources to supporting teachers to prepare for the transition to proficiency-based learning. Maine districts, in partnership with the Reinventing Schools Coalition, offered training on classroom design to help teachers look at their own beliefs about learning, examine tenets of personalizing learning,

build student agency by creating classroom codes of collaboration, introduce new operating procedures, enhance formative assessment, develop and take advantage of transparency of learning targets, and plan for a competency-based instructional model that emphasizes higher order skills.<sup>34</sup>

Teachers can begin to use a variety of ways to manage their personalized classroom, including creating a shared purpose with their students, standard operating procedures that emphasize how students can get help (re-read the directions, ask a peer, then ask the teacher), visuals with the standards to indicate how students are progressing, posters that emphasize a culture of learning and the idea that mistakes are simply part of that process, examples of student work that are considered proficient, parking lots, and planning tools to guide students in thinking through what they will need to be successful.<sup>35</sup>

Many schools fall into a trap in the first years in that they teach learning continuum in a rigid, linear fashion because they have been written that way. Brian Stack, Principal at Sanborn Regional High School, explained that the very opposite should be happening. “The competencies target our learning for us and help us see how we can connect learning.” For example, one team in the Sophomore Experience created a unit on epidemics. They read [The Hot Zone](#) as part of their English Language Arts, looked at the government’s role in crisis for social studies, and built knowledge on viruses for science. They then tied it all together by producing and presenting an emergency response plan.



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- Many schools encounter unintended consequences during the transition from a time-based, one-size-fits-all culture to a personalized culture invested around intrinsic motivation and student agency. Teachers may find that some students fall behind when they are given too much leeway in moving along at their own pace. Other students may not submit homework because there are no longer points attached to it, or fail to study for tests because they can count on taking a re-assessment later on.

To prevent this, educators must make sure that each class develops a strong code of collaboration or shared purpose to help shift the ownership of learning to the students. A meaningful set of habits of learning is also important so that teachers can use them to reflect with students on their behavior and the consequences. Teachers can negotiate how much independence students have based on their demonstration of the habits. When students do try to take advantage of the greater flexibility to do less, teachers can engage them on their habits and the impact they will have on their future lives in college and careers.

Beware of how “time is a variable” can be interpreted. Emphasize that pace matters and turn to the idea of the growth mindset to put the focus on effort. The variable of time doesn’t mean that students can lag behind—it is that students may need more time during the day or week to work on the concepts with the necessary instructional support. Make sure that students know they need to demonstrate proficiency before they take an assessment—thus assignments may be opportunities for practice and to demonstrate learning. Re-assessments cannot be taken until additional work is done to demonstrate their learning—thus students will have to do more work, not less, if they choose not to study for exams.

## D. Planning for Leveling and Parent Conversations

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*First, we need to make sure the system is transparent about where students are on their learning progression and how they are progressing. And we need to have honest conversations about it without blaming the child, educator, or system. We can't hide behind any excuses. We need to have the courage to act in the best interest of our kids.*

– Virgel Hammonds, Superintendent, RSU2

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As described previously, schools will need to determine students' academic levels as distinct from their grade levels (often referred to as leveling). It will be important to help teachers prepare for engaging parents in the initial conversation about where students are on their learning progression. Anticipate questions such as, "Why is my child not at grade level? Why are you starting him on an academic performance level rather than on grade level? Why is my child's target for growth an academic level or two rather than their grade level?" (Listen between the lines, as what they are really asking is, "Will my child ever catch up?")

According to Copper Stoll, formerly Chief Academic Officer at Adams 50, the district dedicated a day to meet with every parent to inform them of their child's placement in ELA and math the spring before they began their K-8 competency-based system. Teachers had talking points to help create a consistent message. They personalized the conversation by providing folders that included information on the standards their child would be learning based on the student's academic placement as well as brochures that explained the personalized mastery system. This laid the groundwork so parents wouldn't be surprised if their child was placed in an academic performance level below their chronological grade level in the coming year. They continued to use a quarterly reporting system that parents were used to while introducing the standards-based progress reports. They also offered parents access to the electronic information system so they could monitor progress independently. According to Stoll, "Parents didn't express any concerns, as they knew their kids were behind and they were grateful that we were finally doing something to address it!"<sup>36</sup>

Ephraim Weisstein, founder of Schools for the Future, recommends expanding the conversation. The discussion with parents and students about learning, progress, and pace should be followed by conversations about the bigger picture—the development of their child, their habits of learning, and their path toward graduation and beyond.

Creating access for parents and students to the digital information system is a powerful step for reinforcing student ownership and a culture of learning. At Chugach, the initial discussions were centered on the students who performed below their "age level," and eventually moved to areas where they might already be ahead. The result was a series of productive conversations about student strengths and interests as well as areas for improvement. As Superintendent Bob Crumley put it, "Adults had the most concern about student performance placing them in levels below their perceived 'age level.' Students had less concern about this because it was information they already knew. The new system seemed like common sense to them, as they intuitively knew that all students were different and performed at varying levels across the content areas. This dynamic led to students increasing their likelihood of providing peer help and asking for peer help. Over time, the conversation changed. Rather than focusing on students who were 'behind,' the light began to shine upon where students were actually performing and what strategies and resources were going to help them advance."



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- One of the big shifts of culture in a competency-based system is that the idea of being “fair” to students and their families is no longer about giving them a higher grade or points for good behavior. Instead, educators are honest about where students are on learning progressions and ensure they have adequate supports in place so that students are not academically behind indefinitely. Because a competency-based system is transparent and honest about where students are on the progression, it gives them the chance to build their skills—an opportunity that is denied them when we say students are getting an A, B, or C but are not actually learning the skills they need.

### E. Making Mid-Course Corrections

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*We need to have honest conversations about when a process or approach isn't working. Adjust it now if you know it's not working. It can be difficult because everyone is working so hard, and they might have spent months trying to develop a new process. But if it isn't working, they need to deal with it, not wait until the end of the school year. We have to be courageous to confront activities that aren't moving kids in their learning. We can't be afraid to confront the truth. If a process isn't working, either refine it or scrap it.*

– Virgel Hammonds, Superintendent, RSU2

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Bob Crumley explained that in the early years of the transition at Chugach School District, he felt like he was “pulling weeds.” As the team implemented the new instructional models, they kept stumbling over practices and operational issues that were rooted in the traditional, time-based system. For example, students were learning through extra-curricular activities, but CSD wasn't including that performance data within their system. They turned extra-curricular activities into co-curricular activities by building in processes, students, and stakeholders until they began to see that learning occurs anywhere and at any time. Expanding the walls of the classroom to include athletics, student government, field trips, the arts, and career development created opportunities for students to pursue high interest learning opportunities.

Both Brian Stack, Principal at Sanborn Regional High school, and Jonathan Vander Els, Principal at Memorial Elementary, have described having to refine their grading and scoring systems after the first year of implementation. Stack pointed out, “As a leader, what stood out for me as an example of resolute leadership was when my fellow administrators and I had the courage to recognize that a decision we made was not working, and we were able to make a change mid-year. It would have been very easy to use that mistake as an excuse to go back to our old system, but we managed to stay true to our vision for competency education and find a way to overcome the hurdles and roadblocks that were put before us.”

Keeping the community engaged throughout implementation is critical. As Pittsfield School District began implementation, they alerted their Community Advisory Council (now called the Good to Great Team) as they hit implementation issues to engage them in problem solving around mid-course corrections. Rick Schreiber of the Reinventing Schools Coalition cautions, “Often a district will establish a strong shared vision but fails to implement regular communication with stakeholders to seek out further input. In the beginning, stakeholders

are building trust, and there is excitement about the upcoming changes. The second and third years are critical for leaders to continue the shared vision process to address the social, emotional, and logistical issues that arise from second order change.<sup>37</sup>

Principals will find that as teachers stretch themselves to meet the needs of students, there will be significant demands to increase the responsiveness and flexibility of the school to provide resources. If schools didn't organize a flextime for instructional support, they will want to do so immediately. There will also be demands for more modular calendars so that frequent regrouping can happen to help students who need additional support advance to where their academic and grade levels are closely aligned (i.e., staying on track).

Memorial Elementary School found that their competency-based approach "fit flawlessly into our tiered-response model." Still, creating a schedule wasn't easy. Team leaders worked together to devise a schedule that provided time for intervention and extension, the LEAP block, for every grade level. There were varying points of views and considerations about how to do this, and they ultimately designed a schedule that took into account the developmental needs of students. The result is that every student can get extra help on whatever is most challenging to them every day. Similarly, Pittsfield School District had to go through several iterations before landing on a fairly traditional schedule four days of the week, with Wednesdays having a late start and shorter classes to create time for teachers to meet and pursue professional development, to have a block of time to support students academically and in leadership development, and to offer the high interest, project-based learning in Studios.



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Practices that need to be discarded or refined are often related to the master schedule; assessment, grading, and reporting; honor roll and valedictorians; competency recovery; athletic eligibility; and transcripts and college and career planning. Some of the mid-course corrections will be easy to facilitate, while others will have much more complexity, challenge deeply held belief systems, and may even feel counter-intuitive.
- Culture change is slow and needs constant reinforcement. Fidelity of implementation will be dependent on the ability of district and school leadership to tap into the motivational drivers of educators and engage with skeptics to overcome their resistance. Leadership attention is needed to fully integrate new practices.

## F. Refining the Instructional Model and Enhancing the Instructional Cycle

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*Is it just enough for us to say that in education we are standards-based? Does that result in students who are competent? Not necessarily so. We do need to have students learning what they should know and be able to do within a discipline. However, competency really speaks to a depth of knowledge that is beyond knowledge of content and skills. Competency requires that students acquire, make meaning of, and also transfer their content and skills.*

– Rose Colby, Consultant on Competency Education

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The instructional infrastructure and its focused attention on student learning, the instructional cycle, and teacher skill-building will be a work in progress for several years. The first year, teachers will offer a flurry of ideas about problems, refinements, and innovations. It is important to create a strategy for managing the revision process. Summit Public Schools has a lean start-up model that quickly tests out ideas to see if they are valuable before implementing them school-wide.<sup>38</sup> Many districts engage educators in dialogue to determine which items are critical to change and which can be addressed later on, which helps to prevent the new system from imploding under the weight of its own potential.

Many issues are likely to emerge at this time: how to improve consistency on assessing student work, how to lift up both assessment and instruction to higher levels of learning, how to better support students who have difficulties with subject matter, how to provide more opportunities for students to personalize their learning experiences, and more. It is likely that the misalignment between the desired depth of knowledge, assessment, and instruction will emerge as a healthy tension as educators recognize that it is an obstacle to ensuring students are attaining higher levels of learning. Based on the feedback from educators, principals can co-design a strategy to strengthen assessment literacy, deepening their knowledge of teaching disciplines through the work on learning trajectories (now referred to as learning progressions), and building performance assessment capacity. It's not all going to happen in the first year.

In the third year of implementation, Memorial Elementary School began to focus on strengthening their instructional capacity in math. They turned to the Ongoing Assessment Project ([OGAP](#)) that is based on research on learning progressions and cultivates the use of formative assessment in the instructional cycle. Teachers worked together on learning progressions to more deeply understand the reasoning behind major concepts, such as multiplicative reasoning, and expanded their instructional strategies to help students learn. For example, students were expected to explain their reasoning and unpack how they were solving problems so teachers could have more data on where to provide formative feedback. Teachers began to build up item banks that provided substantial information on how students approach math problems. They also developed additional assessments of major concepts to ensure students understand the fundamentals they will need for later courses.

Chugach made three significant enhancements to their instructional framework. First, they focused on “inter-rater reliability” or calibrating assessment of performance-based assessments. Dedicated time for staff development and the opportunity to score the same student work led to discussions about the assessment tools and processes. Over time, this expanded to include refinement of the tools, instructional alignment, and more meaningful feedback for students and parents. Second, they introduced process standards in all content areas to better prepare students to be lifelong learners. Beginning with the scientific method and later including others such as writing processes, math problem-solving processes, and conflict resolution, staff worked together to build their skills at teaching processes. Eventually the process standards were embedded into the performance-based assessment structure. Older students now use the process standards in developing their individual learning plans. Third, the teacher evaluation system at Chugach was upgraded to reflect the same values and principles. Today, all staff are involved in a year-round Performance Evaluation Process (PEP) that is part of the pay for performance system. Teacher scores are averaged across the district so that Performance Pay is equal for all teachers. This has led to teachers who are scoring higher to be more likely to reach out to assist those who are new to the profession and those in need of assistance. All of this is done in a collaborative spirit where teachers understand that they are all in this together, and ultimately for the good of the students.

## G. Preparing for the Implementation Dip

There is likely to be an implementation dip during transition years. After the initial work is done, confusion tends to rise and achievement scores may go down. The question is, how fast can districts get beyond the dip and embrace the new practices?

Pittsfield invested heavily in preparation and engaging the community, and then implemented the redesign in one year. It was a challenging year of “ripping off the Band-Aid.” But when they came back in September of the next school year, they were all going in the same direction and were ready to begin refining and enhancing their student-centered approach. Building in a late start Wednesday for teachers to meet made the implementation year manageable.

Chugach solidified the school board and district leadership commitment to a long-term strategy and created an intentional communication strategy that reinforced the idea that the system transformation will take several years. They also used data to intensify the sense of urgency by reminding people of the poor results in the traditional system as well as celebrating small steps of progress. Most importantly, they kept their community engaged so members could continue to deepen their understanding and celebrate alongside the students who were beginning to thrive and enjoy coming to school.



### LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- Remember to use the shared purpose and guiding principles when doubts arise during difficult times in the first years of implementation. There may be times when it feels best to create hybrid models that maintain parts of the traditional system. Test those ideas out with your guiding principles to ensure they won't undermine the commitment to learning and supporting all students to reach proficiency.
- Districts converting to competency education know they need to invest in organizational learning in order to fully integrate the new infrastructure. Learning means mistakes are going to happen. Just as competency-based schools need to create a safe place for students to make mistakes, those districts converting to competency education need to create safe environments for educators. This means district leadership will need to engage state leadership with the institutional power to create room for innovation. Invite policy leaders to site visits with you to more developed competency-based schools. Encourage them to read [Necessary for Success](#) about how other states are creating innovation space. Most importantly, recognize their leadership when they take risks themselves to change the top-down compliance culture of state-level organizations.

## THREE WAYS DISTRICTS STUMBLE IN IMPLEMENTATION<sup>39</sup>

In interviews, district and school leadership have shared the ways they learned from their mistakes when they stumbled or the ways their neighboring districts have encountered troubles.

### A. Are Your Shared Values and Shared Purpose Alive?

If districts and schools do not have a clear, shared purpose or do not consistently use their shared values in daily decision-making, it is difficult to develop or maintain the desired culture. To ensure that shared values are embedded within the fabric of the schools, create a shared purpose for the entire district, with schools developing a variation for themselves and with each teacher developing a “code of cooperation” with their students to ensure ownership of the commitment to learning.

At RSU2, complex problems are addressed using the school’s set of guiding principles such as, “Students learn in different ways and in different timeframes” and “mistakes are inherent in the learning process.” For example, by using the guiding principles at public discussions on the budget, RSU2 has been able to resolve issues and reinforce the shared purpose of the school system.

### B. How Distributed is Your Leadership?

When processes are inadequately inclusive or shared leadership is in name only, schools will quickly revert to turning to higher levels of governance, the district, or school leadership to make decisions. This can also open the door to mistrust if people are invited to participate in processes only to find that top management makes decisions through separate processes. Educators need to understand the decision-making processes, their role in it, and when they will have opportunity to have input. District and school leadership will need to take the responsibility to design, get feedback, and then implement decision-making processes with integrity.

There are several ways districts can invest in distributed leadership to ensure it is sustainable. First, create organizational structures that ensure participation, be clear about responsibilities, and encourage membership. Second, leadership needs to ensure that processes are clear and that there is someone to check that they are implemented with integrity. Third, the focus should remain on the shared purpose. Distributed leadership can create difficulties when individuals take ownership but are more enthusiastic about their own ideas or only consider their team rather than the whole. District and school leadership may need to make interventions to help people see how ideas might work for them but not for everyone else.

### C. How Strong is the Ownership?

Districts have often relied on marketing or buy-in methods to introduce new initiatives. However, community members or educators may accept the initiative without ever having a sense of ownership and can begin to blame the district when implementation doesn’t run smoothly. Superintendents who have converted to competency education suggest engaging community members and students in developing and periodically revising the shared purpose so that new community members have a chance to have ownership. Internally, you may wish to develop processes that take into consideration motivational theory and clear decision-making processes so that staff understand the scope of their autonomy. Consider making the process of creating shared values and a code of cooperation a non-negotiable for educators. Perhaps, as Pittsfield School District has done, students can become part of policymaking processes. Embed reflection by all stakeholders to think about their contribution and ownership into operations.

## vi. Embracing Continuous Improvement and Innovation

*We aren't done innovating until 100 percent of our students are graduating.*

– Ty Cesene, Co-Director, Bronx Arena

It is no surprise that Chugach School District received the [Malcom Baldrige National Quality Award](#) in its seventh year after creating a performance-based system. Competency education creates the conditions for continuous improvement and mutual accountability in managing school operations. When the only data is attendance and A–F grading scales, districts do not have access to data that allows them to track student progress in learning. With the rich data produced in competency education, schools can drive towards what Marzano Research refers as “high reliability” schools—schools that are able to continue to reflect upon their own performance and adjust to better meet the needs of students.<sup>40</sup>

There is a tremendous shift for leaders to move from compliance to continuous improvement. Compliance has an inherent element of fulfilling specific requirements where continuous improvement reaches for the stars. Oliver Grenham explained that at Adams 50, they discovered there was no middle ground. They were “all-in or nothing” because the shift to competency education requires a totally different paradigm. He compared it to that visual game in which you can see an old woman or you can see a young woman, but you can't see both at the same time. For district and school leaders, this means having to learn about continuous improvement management techniques early in the transition, even before the data may be fully available. There is simply no way to revert back to compliance management strategies after a second order change. The culture of learning expands to become a culture of continuous improvement with a focus on results.



Continuous improvement in this context is a formal methodology or a system to improve performance through reflecting upon data, engaging stakeholders in discussions about variation or low performance, planning for targeted improvements, and then repeating the cycle. Many districts use an easy to use process of Plan-Check-Act-Do to manage improvements. There are other techniques, as well, such as implementing quality controls or benchmarking against other organizations to seek out and adopt best practices.

At times, continuous improvement activities may be an internal process with educators fine-tuning the operations and practices within a school. For example, at Sanborn Regional High School, the ninth grade is organized into five academies, each with a team of teachers. The teachers, working as a PLC, use data to help students boost their skills, develop habits of learning, and successfully transition into high school. However, if the focus of the continuous improvement process has wider implications, a broader set of perspectives including students and community members will be brought into the process. Larger issues and more inclusive processes will of course affect the timeline. Over time, management teams will build the capacity to develop insightful management and exception reports that allow them to monitor performance (quality) and seek improvements to better serve targeted populations as students and as system-wide breakthrough innovations.<sup>41</sup>

New Hampshire's Virtual Learning Academy Charter School (VLACS) has embraced continuous improvement driven by a focus on student-centered learning. Already offering highly individualized, open-entry, competency-based online courses and competency recovery, VLACS began to seek ways to create greater personalization in which students could have more opportunity for learning experiences based on their interests and wider selection in how they learned and demonstrated their learning. VLACS is creating a variety of options for students to learn through projects and through experiences such as internships and college courses. Thus, students will have the opportunity to co-design their learning to a much higher degree as they select the mix of instructional approaches that are right for them.



## LESSON LEARNED AND LEADERSHIP OPPORTUNITY

- As districts build the capacity for continuous improvement, they find they need a more agile organizational capacity—they need an adaptive district. They may start by thinking about the organization differently by placing students at the top of the organizational chart rather than the superintendent or school board. Then they will begin, as Pittsfield School District and Chugach School District have done, to develop a flatter district organizational structure. Job descriptions are revisited, success measures put into place, and structures established to emphasize the knowledge, skills, and talents the adults need to succeed.

### A. Improving Performance and Personalization through Powerful Data

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*We've learned that in order to manage in a performance-based system, we need to start with a balanced scorecard. When doctors do a check-up, they look at your heart, lungs, and weight. They consider it in terms of your height, gender, age, and your previous health status. We know that to have an accurate portrayal of our health, we need a balanced scorecard of indicators. The same goes for education. We need to have a balanced scorecard of indicators for our students, staff, and stakeholders to use to make decisions.*

– Dr. Bob Crumley, Superintendent, Chugach School District

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Timely, relevant data plays an important role in the transition to student-centered learning. In the process of the transition to competency education, school leadership, educators, and students will want, or even demand, an integrated information system to take advantage of the increased data on student learning. The drive toward improved student performance will increase the demand for data to guide greater personalization. Teachers who recognize the value of tracking student progress based on standards will not be content with the modifications allowed in most traditional student information systems or learning management platforms organized around semesters and courses. They will want to be able to monitor, support, and credential learning on standards regardless of if students are working below or beyond their grade levels. This requires organizing standards in a learning continuum beyond the course structure and displaying data in a way that gives a picture of the student profile—an entire student's body of work and mastery, not just grading assignments and assessments within a course.

An integrated learning system to support competency-based environments starts with student profiles and standards-based learning continuums. Indicators of a student's progress on each standard across content areas are key. Many vendors are offering standards-based or competency-based grading, but don't provide the student-centered approach to managing progress along a learning continuum in all the significant domains. The student information systems that support traditional time-based schools are organized by courses or classes—not students—thus it is very difficult to generate a picture of how students are advancing across disciplines and over the years.

In early stages of the transition, most districts collect data on how students are progressing within the academic disciplines. As the competency-based system is further implemented, tracking of data on student learning often expands to include habits of learning, the type of learning experiences to ensure students are having adequate opportunities to apply learning in real-world settings or projects, and a broader set of domains. Bob Crumley explains, "It's important to send a message that the state testing indicators aren't the end all, even if that's the focus of state legislators. It sends a powerful message when the state only tests reading, writing, and math but not social studies or employability skills. As a district, we had to put into place a system that created a meaningful and balanced way to talk about student progress and our effectiveness in all areas. We believe all content areas are equally important. We dedicate staff development and resources on all ten content areas. We monitor progress and celebrate growth in all ten areas."

While stitching and patching together systems that require teachers to enter information into two systems can serve as a stop gap fix in the short run, this is absolutely unsustainable in the long run. New options for next generation learning platforms that are taking into consideration the needs of competency-based schools are beginning to emerge. Some districts are creating customized systems in partnership with vendors. Schools purchasing new products or working with small vendors may be frustrated with inadequate product support, and creating customized systems will raise issues of its own. It is best if a district takes the time, as Fulton County Schools is doing, to develop an enterprise architecture to guide decision making. The process of designing a full enterprise architecture requires districts to clarify—and, if need be, redefine—the core functions of district and school operations and the data needed to support it. The bottom line is that districts will make decisions based on local considerations and the urgency of their need to create transparency for teachers and students to track progress and help focus instructional support to ensure students are continuing to advance.

In addition to developing integrated management systems, districts will need to nurture the culture and capacity for data-driven learning. The student data for personalizing learning with a culture of continuous improvement can be deeply empowering to all the members of a school community. Students and parents can monitor progress in close to real-time. Teachers can more easily personalize education for students' needs, monitor progress, and see where they need to improve their skills. Principals can identify early on when there are students struggling in a number of disciplines or transitioning from steady progress to a slower rate of learning.

Integrated information management systems and blended learning can power personalized models and help bring them to scale. Data-driven instruction will require that teachers expand their skills. As reported by iNACOL, teachers will need to build their technical skills, competencies, and capacity to use data, including the ability to:

- Use qualitative and quantitative data to understand individual skills, gaps, strengths, weaknesses, interests, and aspirations of each student, and use that information to personalize learning experiences;
- Use data from multiple sources to inform and adjust individual student instruction and groupings; and

- Create ways to move ownership and analysis of data to students to promote independent learning. Continually evaluate technologies, tools, and instructional strategies to ensure their effectiveness.<sup>42</sup>

As districts and schools begin the process of designing information systems, it is important to keep the decisions about operations and data-driven instruction in balance with the availability and capacity of the technology. For example, as teachers build their capacity to manage flexible personalized learning environments, they will be generating data on student learning through direct observation, formative assessments, and in dialogue with students. It is important to consider in advance how much assessment data teachers are going to need to track, analyze, and adjust for instruction in relation to student progress—and then look at the degree of ease in digitally managing this information. Districts have learned to stay focused on the most important items to track so teachers can concentrate on providing responsive instructional support.

In developing an integrated learning system, districts will also want to consider how it enhances student ownership of how, when, where, and what they are learning. In making design choices about the information systems, districts have an expanded understanding of end users and are thinking about how students, parents, teachers, PLCs or departments, principals, and district staff can use data to enhance learning and increase the agility of the system. For example, dashboards can be created that facilitate the use of data from different stakeholder perspectives, thereby empowering teachers and students and helping to inform conversations about instruction and daily operations.

As districts continue to deepen their implementation of competency education, it is anticipated that a deeper understanding of the system requirements and capabilities for a comprehensive integrated learning system will be developed. Such a system provides the platform for a school's learning environment by enabling the management, delivery, and tracking of student-centered learning, and includes robust reporting and analytics capabilities. An effective and well-designed information system is an important tool for educators to input and analyze data about their students; to curate instructional materials; to track student mastery; to support students in documenting their work and progress toward mastery; and to communicate with students and their families about their progress. An integrated learning information system could also provide data to school and district staff on the use of instructional materials and their impact on student performance.<sup>43</sup>



## LESSONS LEARNED AND LEADERSHIP OPPORTUNITIES

- When writing requests for proposals (RFPs) for an information management system, start with describing the desired functionality (the ability of the system to accomplish a goal) rather than a list of features (tools or features). An RFP that is a long shopping list of features can cause difficulty in implementation later on. When using functionality, district and school leaders will need to describe use cases that can help them think through how single or multiple products will help meet their goals. This is particularly important for competency-based districts, as there are new functions being developed such as monitoring the level of the depth of knowledge students are demonstrating.
- Districts will want to begin to build their analytical capacity to better support principals in designing and using management and exception reports as well as rethinking performance metrics for the system, such as doing cost-benefit analyses. How much learning is happening per unit of time? What strategies are working to address the needs of students not yet proficient? What are the most effective approaches? What is the most cost-effective use of resources?

- Be careful of expecting a one-solution approach and, alternatively, cobbling together systems that don't integrate well. Begin with an enterprise architecture approach. New platforms and technology tools are emerging that will better help meet district need expectations for data and information management, as well as content and learning management.

## B. Addressing the Needs of Struggling Students

After the first few years of transition, districts begin to have the bandwidth to look more deeply at where students are not advancing or are at a lower level academically than their age-based grade. Although not necessarily done in a linear fashion, there are three ways that districts and schools begin to respond to struggling students. First, they create strategies and direct more resources to struggling students. Second, they begin to explore more deeply how habits of learning impact student achievement, building out their capacity to nurture students. Third, they seek out ways to improve instruction overall so that more teachers within the school have the disciplinary knowledge to help students advance.

At Sanborn Regional High School, the Freshmen Learning Communities are designed to help ninth graders build the skills they need for success and identify where students need additional support. They are finding that the conversations about students with special education needs are more focused on learning and progress than behaviors. The understanding of standards, differentiated instruction, and accommodations for assessments has become much more clear and intentional.

Pittsfield Middle and High School (PMHS) is exploring different ways to respond to the needs of students who are struggling or enter school more than one year behind in grade level. They've developed a strong intervention system, with an emphasis on reaching students in middle school. They have reading and math specialists and are providing double doses of reading and math. They also are reaching into elementary school with a special education teacher at every grade level, working to help students learn foundational skills.

**Students receive  
more time, support,  
and instruction  
until they succeed.**



High school is harder, as many of the students who are struggling have given up and don't want to be in school at all. PMHS worked with the Virtual Learning Academy Charter School to provide competency recovery for students. They then began to build the capacity for competency recovery into Pittsfield, with resources set aside to support students during the summer. They also are exploring ways to use personalized learning to respond to the needs of struggling students, creating opportunities to build their skills through areas of interest instead of just repeating courses.

Lindsay Unified School District continues to innovate to better support students who don't have the skills they need. They have expanded the capacity of teachers to support literacy across the curriculum to better respond to English language learner students at the bridging level. They have added special programming for incoming freshmen who have weak foundational skills, and they offer online learning to fill gaps and build fluency. They have expanded their emphasis on habits of learning, what they refer to as lifelong learning skills, to be more powerful in engaging students and asking them to reflect on the skills they need to succeed. They are now beginning to think about ways they can better serve the group of students that are disengaging from high school by offering more flexibility, opportunities to work and take college courses, and support to address issues in their lives that may be getting in the way of school.

### **C. Revisiting Shared Vision and Instructional Model**

Districts can keep the shared vision alive by periodically revisiting it in partnership with their communities. This provides an opportunity for district and school leadership to engage new members of the community in the vision, continue to address the concerns of skeptics, and, if the demographics of the community are changing, revise the vision to encompass their vision for their children.

Similarly, engaging educators in revising the instructional model periodically is important. Rick Schreiber from the Reinventing Schools Coalition advises districts to strive to develop regular cycles for making adjustments. This allows schools to collect input over time and to consider that input and the reasoning behind the suggestions in a cohesive process.

Schools will vary in how much time they need to become comfortable with the new instructional design and when they are ready to begin a revision process. Depending on the rollout strategy used within a school, principals and district leaders will need to determine when is the best time to engage in revision based on the progress of their schools.

As teachers revisit the instructional model, it is likely that they will want to touch on the overall pedagogical approach, as well. Their understanding of motivating students and instruction and assessment will be growing, and they will likely want to enhance the description of the school's approach as well as the I&A model. For example, after a few years of implementation, Chugach began to monitor the instructional approach that students were using to learn. Based on a belief that it is important for students to have varied learning experiences (including direct instruction, interdisciplinary units, performance tasks, and independent learning), the schools and district staff use their AIMS web-based information management system to ensure that students are receiving a balanced approach to learning.

In Pittsfield, teachers have engaged in rich conversation about the implications of student voice and choice within the learning process. Former Dean of Instruction Sue Graham explained that as teachers unpack the

standards and competencies to identify the enduring questions, they begin to ask, “What are the different ways students can get to those competencies?” She pointed out that the depth of knowledge teachers have in their content area makes a difference. The more knowledgeable teachers are of the discipline and the competencies, the more comfortable they are in offering flexibility to their students. Increasingly, teachers are starting to understand that if they don’t know where students struggle and where the misconceptions are occurring, they are limited in how they can help students overcome them.

Other areas where districts are strengthening their approach include investing in knowledge on learning progressions, building systems of performance-based assessments that lift the level of knowledge to ensure students are able to apply skills, and developing a cohesive approach to helping students build habits of learning.

## D. Staying the Course

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*I don't manage through memorandum. I don't know the last time I made a district-wide mandate. They just don't work because there is no ownership. Practices are likely to be implemented at a minimal level and may slip away under new leadership. By having the chance to be part of the process, our team sees the value in decisions regarding district operations and the instructional model. By having a chance to do their own inquiry, they are developing their own understanding about the instructional approaches they can fully integrate into their own practice. It may take longer, but the investment in the process is well worth it.*

– Dr. Bob Crumley, Superintendent, Chugach School District

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Many districts are converting to competency education in states that have not yet begun to take the steps toward creating the vision and policies to support competency education. Even in states that have embraced competency education, leaders may need to respond to policies that have not yet been re-aligned. Thus, leaders must learn to stay true to their vision and purpose in navigating state policy. They may turn mandates into opportunities or actively work in partnership to co-create the new policy infrastructure. Essentially, they operate beyond the boundaries of the policies so that decision-making continues to be student-centered.

One of the leadership functions needed to stay the course is being able to turn top-down compliance requirements into opportunities to reinforce the empowered culture of learning and improvement. Bob Crumley talks about how he manages mandates by stating, “I’ve learned to see mandates from the state as opportunities. We will meet the letter of the law, but we aren’t going to let the tail wag the dog. For example, we have a state mandate about including state assessment scores in teacher evaluations. We have a great teacher evaluation tool developed by teachers and our administrative team. I’m not going to make any changes to the evaluation tool that causes a loss of ownership. Instead, I’m going to tell our teachers that there are state requirements we need to meet, and we’ll take this opportunity to see if we can improve the evaluation tool to help us get better at serving our kids. If we said that we were doing it only because the state required us to, it would send the wrong message to teachers and students. We look to see the value and opportunities that develop when outside forces require us to change and adapt. Continuous improvement is a core value and process at Chugach School District.”

States and districts are also finding ways to work together to advance competency education. For example, four districts in New Hampshire are partnering with the Department of Education to pilot the development of local performance-based assessments that will eventually lead to a state-wide system. These assessments, known as [Performance Assessment for Competency Education or PACE](#), are designed to provide richer feedback to teachers and students in a much more timely fashion than state assessment systems.

Brian Stack advises school and district leaders that, “Making the transition from traditional to competency-based grading is messy. No matter how much you plan for it, administrators and teachers will feel a sense of building the plane while flying it in those first few years of implementation. Stay the course in the face of adversity. Stay true to yourself and to the model. Trust that your teachers will stand with you, and together you will face the challenges that will lie ahead and find a way to work through them as a school community. Your patience and persistence will be rewarded.”

Bottom line, leaders will need to turn to shared leadership strategies to empower educators and engage the community through the ups and downs of the change process, even though there will be pressure to become the sole decision-maker.



**Students show what they know.**

## vii. Concluding Comments

During our research over the last five years, we have had powerful conversations with extraordinary educators leading the transformation to competency-based education. The conversations with district and school leaders have provided the insights and lessons learned throughout this paper.

The paper has explored four stages of the process of converting a district or school to competency education, emphasizing leadership strategies, community engagement, development of a culture of learning, and design decisions for creating an instruction and assessment model. The insights provided by innovators offer a shared recognition of opportunities and challenges encountered in the transition. The evolution to a district-wide competency-based system will not be easy, yet the strategic recommendations from cutting-edge leaders provide a basis to develop strategies to ease and accelerate the transition.

It is important to note that this journey requires a shift in paradigm from a system-centered approach to one that is learner-centered. Leaders and educators must understand the research on teaching and how students learn. They will need to redesign their instruction and practices based on these understandings, placing students at the center. Teachers have described their transition year to competency education as the most challenging year of their professional lives, the most reflective, and also the most meaningful. They have also emphasized that they cannot imagine going back to the old way of doing things.

As your district or school transitions toward competency education, don't expect to immediately observe wholesale changes in the classroom. Jonathan Vander Els and Ellen Hume-Howard both note, "A visitor checking out classrooms at the Memorial Elementary School might be surprised at how traditional everything looks. It's the little things that might catch your eye, however: the charts and graphs on the walls depicting student learning targets, the student work displayed with the standards identifying the learning outcomes, and the conversations students have identifying precisely what they are working on." In these early stages, teachers are busy collaborating with their peers and building new skills. In later stages, as teachers become comfortable in a competency-based learning environment, they will begin bringing new ideas to their leaders and pushing the concepts of what learning looks like as they co-design learning experiences with students that blur the boundaries of school walls, geography, and time, using technology and expanding opportunity for anywhere learning.

It is our hope that the discussion offered here will prepare you to begin the transformational process to design schools where success is the only option for students. As you enter this new phase and develop your own strategies and lessons learned, we hope you share them with your fellow innovators and peers on CompetencyWorks.

Again, thank you to these leaders for their commitment to share their experiences, their creativity in redesigning the system, and their continued vision of transforming the education system into a platform for student empowerment, equity, and success.

## Endnotes

<sup>1</sup> White, Taylor. *Giving Credit Where Credit's Due: A 50-State Scan of Course Credit Policies*, Carnegie Foundation (August 5, 2013). Retrieved from: <http://www.carnegiefoundation.org/blog/giving-credit-where-credits-due-a-50-state-scan-of-course-credit-policies/>. Note: Since the preparation of this report, the District of Columbia, Virginia, and Illinois have taken some steps towards opening up their policies.

<sup>2</sup> To understand the distinction and relationship between personalized learning, competency education, and blended learning, see [Maximizing Competency Education and Blended Learning: Insights from Experts](#), CompetencyWorks Issue Brief (March 2015) by Susan Patrick and Chris Sturgis.

<sup>3</sup> For an explanation of how the time-based system was developed, see [The Carnegie Unit: A Century-Old Standard in a Changing Education Landscape](#), Carnegie Foundation (January 2015) by Elena Silva, Taylor White, and Thomas Toch.

<sup>4</sup> There are several sources of introductory materials. The CompetencyWorks list of [Briefing Papers](#) offers introductory materials, including those for state and federal policymakers. Great Schools Partnership offers [Proficiency-Based Learning Simplified](#). Achieve has created a [Competency-Based Pathways Communications Toolkit](#) that provides key messages and talking points about competency education. Jobs for the Future's [The Past and the Promise: Today's Competency Education Movement](#) offers insights into the research-based underlying competency education.

<sup>5</sup> All references to Virgel Hammonds are based on an interview that was published as [Virgel Hammonds' Six Insights into Leadership](#), CompetencyWorks (October 8, 2014).

<sup>6</sup> The reference to understanding leadership through the metaphor of dance floor and balcony was suggested in an email exchange with Don Siviski, previously the superintendent of RSU2 and the Maine Department of Education's Superintendent of Instruction, currently at the Center for Secondary School Redesign. The metaphor was developed in *Leadership on the Line* by Heifetz and Linsky.

<sup>7</sup> All references to Sanborn Regional School District, Sanborn Regional High School, Memorial Elementary School, and the leadership team of Brian Blake, Ellen-Hume Howard, Brian Stack, and Jonathan Vander Els are based on site visit in February 2014 and their publications of their insights on CompetencyWorks. Please see [Sanborn Regional School District Flips District Reform](#) for the summary of the site visit. You can also find resources explaining the Sanborn Regional School District on the [CompetencyWorks wiki](#).

<sup>8</sup> Please visit [Bill Zima's contributing author posts](#) on CompetencyWorks to find the entire series on leadership and leading a proficiency-based school on which his insights in this paper are based.

<sup>9</sup> All references to Bob Crumley, Debbie Treece, Andrea Korbe, Jed Palmer, and Doug Penn are based on interviews conducted on October 8-22, 2014 during a Chugach School District site visit. Read the entire site visit overview starting with [Driven by Student Empowerment: Chugach School District](#), CompetencyWorks (January 6, 2015).

<sup>10</sup> All references to John Freeman, Tobi Chassie, Susan Bradley, Danielle Harvey, and Lois Stevens are based on an interview conducted on January 31, 2014 during a site visit to Pittsfield School District. Access the full site visit overview starting with [Redesign at Pittsfield School District](#), CompetencyWorks (February 21, 2014).

<sup>11</sup> Other suggestions for reading that can help build the new vision, catalyze a deeper understanding of leadership, and develop new capacity include: *Our Iceberg is Melting* by John Kotter; *Blended* by Michael Horn and Heather Staker; *Good to Great* by Jim Collins; *Drive: The Surprising Truth About What Motivates Us* by Daniel Pink; *The Human Side of School Change* by Robert Evans; *Visible Learning* by John Hattie; *Management of Organizational Behavior* by Paul Hersey, Kenneth Blanchard, and Dewey Johnson; *Learning and Leading with Habits of Mind* by Arthur Costa and Bena Kallick; *Scrum: The Art of Doing Twice the Work in Half the Time* by Jeff Sutherland; and *Learning for All* by Lawrence Lezotte.

<sup>12</sup> All references to Tom Rooney, Jaime Robles, Lana Brown, and Rebecca Midles are based on the October 2, 2014 Lindsay Unified School District site visit. Read about this site visit at [Six Trends at Lindsay Unified School District](#), CompetencyWorks (March 2, 2015).

<sup>13</sup> Interview with William Bryan, Center for Secondary School Redesign, March 10, 2015.

<sup>14</sup> *The Long Conversation*, or, "It's hard, but worth it. Did I mention that it's hard?", Maine Department of Education. Retrieved from: <http://maine.gov/doe/cbp/case-studies/rsu2-case-study.html>.

<sup>15</sup> *Bronx Arena: Organizing Spaghetti*, CompetencyWorks (December 10, 2014). Retrieved from: <http://www.competencyworks.org/case-study/bronx-arena-organizing-spaghetti-part-1/>.

<sup>16</sup> In the paper *Motivation, Engagement, and Student Voice*, the authors find that "Providing opportunities for choice, control, and collaboration are potent strategies for increasing academic achievement. Young people are likely to be more motivated and engaged in an activity when they feel they have a voice in how it is conducted and can affect how it concludes." Retrieved from: <http://www.studentsatthecenter.org/topics/motivation-engagement-and-student-voice>.

<sup>17</sup> Insight from Making Community Connections Charter School and references to Kim Carter were provided by a site visit in February 2014. For more information, see the site visit overview beginning with [Igniting Learning at the Making Community Connections Charter School](#), CompetencyWorks (April 1, 2014).

<sup>18</sup> The following resources can be helpful in beginning to develop a strategy for leveraging blended learning to improve and expand learning experiences for students:

Allison Powell, Beth Rabbitt, and Kathryn Kennedy. [Blended Learning Teacher Competency Framework](#), iNACOL (October 2014).

Rob Darrow, Bruce Friend, and Allison Powell. [A Roadmap for Implementation of Blended Learning at the School Level: A Case Study of the iLearnNYC Lab Schools](#), iNACOL (October 2013).

John Bailey, Carri Schneider, and Tom Vander Ark. [Navigating the Digital Shift: Implementation Strategies for Blended and Online Learning](#), Digital Learning Now! (2013).

<sup>19</sup> All references to Jane Bryson of Education Elements are based on an email exchange that occurred in March 2015.

<sup>20</sup> All references to Harvey Chism, Senior Director of School Design at EPIC Schools, are based on an email exchange that occurred in March 2015.

<sup>21</sup> The four questions are based on the work of Richard and Rebecca DuFour, with adjustments made for the emphasis on competency or the application of skills to new contexts.

<sup>22</sup> Sturgis, Chris. *The Art and Science of Designing Competencies*, CompetencyWorks Issue Brief (July 2012). Retrieved from: [http://www.competencyworks.org/wp-content/uploads/2012/08/CompetencyWorks\\_IssueBrief\\_Design\\_Competencies-Aug-2012.pdf](http://www.competencyworks.org/wp-content/uploads/2012/08/CompetencyWorks_IssueBrief_Design_Competencies-Aug-2012.pdf).

<sup>23</sup> Please visit [Rose Colby's contributing author posts](#) on CompetencyWorks to find the insights and blog posts on which all references to her in this paper are based.

<sup>24</sup> Ruff, David. *Thoughts on Grain Size*, CompetencyWorks (May 27, 2014). Retrieved from: <http://www.competencyworks.org/analysis/thoughts-on-grain-size/>.

<sup>25</sup> All Adams 50 quotes are based on an interview with Oliver Grenham and Jeni Gotto, found in *A Conversation with Adams 50*, CompetencyWorks (March 12, 2014). Retrieved from: <http://www.competencyworks.org/uncategorized/a-conversation-with-adams-50/>.

<sup>26</sup> Please visit [Jonathan Vander Els' contributing posts](#) on CompetencyWorks to access his experiences and insights at Sanborn Regional School District and Memorial Elementary.

<sup>27</sup> For resources on why the traditional grading system is ineffective and how to develop standards-referenced and standards-based grading, see *Progress and Proficiency: Redesigning Grading for Competency Education*, CompetencyWorks Issue Brief (January 2014). Retrieved from: <http://www.competencyworks.org/wp-content/uploads/2014/01/CW-Progress-and-Proficiency-January-2014.pdf>.

<sup>28</sup> All the public institutions of higher education in Connecticut, Maine, New Hampshire, Rhode Island, and Vermont and three private institutions have endorsed proficiency-based learning in partnership with the have joined the New England Secondary School Consortium. See <http://www.greatschoolspartnership.org/55-new-england-colleges-and-universities-support-stronger-student-preparation/> for more information.

<sup>29</sup> *Center on Continuous Instructional Improvement*, Consortium for Policy Research in Education. Retrieved from: <http://www.cpre.org/center-continuous-instructional-improvement>.

<sup>30</sup> Heritage, Margaret. *Learning Progressions: Supporting Instruction and Formative Assessment*, National Center for Research on Evaluation, Standards, and Student Testing (2008). Retrieved from: [http://www.ccsso.org/Documents/2008/Learning\\_Progressions\\_Supporting\\_2008.pdf](http://www.ccsso.org/Documents/2008/Learning_Progressions_Supporting_2008.pdf).

<sup>31</sup> Susan Patrick and Chris Sturgis. *Maximizing Competency Education and Blended Learning: Insights from Experts*, International Association for K–12 Online Learning (March 2015) Retrieved from: <http://www.competencyworks.org/wp-content/uploads/2015/03/CompetencyWorks-Maximizing-Competency-Education-and-Blended-Learning.pdf>.

<sup>32</sup> Zima, Bill. *Lens 3: Meeting Facilitation*, CompetencyWorks (August 1, 2013). Retrieved from <http://www.competencyworks.org/reflections/lens-3-meeting-facilitation/>.

<sup>33</sup> Interview with Jim Rickabaugh, Director of the Institute @ CESA #1, November 6, 2014.

<sup>34</sup> See *The Long Conversation (RSU 2 – Kennebec Intra-District Schools)* and other case studies on implementation of proficiency-based learning in Maine at the Maine Department of Education Center for Best Practices, <http://maine.gov/doe/cbp/case-studies/rsu2.html>.

<sup>35</sup> Courtney Belolan, an instructional coach at Mt. Ararat Middle School in Maine, has written extensively at CompetencyWorks on how to personalize classrooms in a proficiency-based environment, <http://www.competencyworks.org/author/courtney-belolan/>.

<sup>36</sup> *Preparing for Conversations with Parents*, CompetencyWorks (September 29, 2014). Retrieved from: <http://www.competencyworks.org/analysis/preparing-for-conversations-with-parents/>.

<sup>37</sup> From an email exchange with Rick Schreiber, Reinventing Schools Coalition, March 16, 2015.

<sup>38</sup> Gomes, Patricia. *The 'Lean Startup' Model Goes to School*, edSurge (March 26, 2013). Retrieved from: <https://www.edsurge.com/n/2013-03-26-the-lean-startup-model-goes-to-school>.

<sup>39</sup> *Juggling Frogs*, CompetencyWorks (May 10, 2012). Retrieved from: <http://www.competencyworks.org/uncategorized/juggling-frogs/>.

<sup>40</sup> Marzano High Reliability Schools, Marzano Research. See <http://www.marzanoresearch.com/hrs/high-reliability-schools>.

<sup>41</sup> See the [American Society for Quality](http://www.asq.org) for more information on continuous improvement.

<sup>42</sup> Allison Powell, Beth Rabbitt, and Kathryn Kennedy. [Blended Learning Teacher Competency Framework](#), iNACOL (October 2014).

<sup>43</sup> In 2015, iNACOL will launch a structured effort with districts to examine the specific set of system requirements and functional capabilities for an integrated learning system to manage student-centered learning.

## About the Author

### ***Chris Sturgis***

Chris Sturgis is Principal of MetisNet, a consulting firm based in Santa Fe, New Mexico, that specializes in supporting foundations and special initiatives in strategy development, coaching, and rapid research. MetisNet specializes in competency education, high school reform, dropout recovery, youth issues, and community engagement. Chris brings a commitment to drawing on local knowledge (metis) early in the design process to ensure that problem definition reflects the realities of communities. Her knowledge of philanthropy was developed while at the Charles Stewart Mott Foundation and Omidyar Foundation. Prior to joining the philanthropic sector, she worked in state government, human service organizations, and campaigns. She has consulted to the U.S. Department of Education on secondary school policy. She is co-founder of the Youth Transition Funders Group and contributes to the Connected by 25 blog. Chris is a co-founder of CompetencyWorks.

## Other Issue Briefs Available at CompetencyWorks

- Maximizing Competency Education and Blended Learning: Insights from Experts by Susan Patrick and Chris Sturgis, March 2015
- A K–12 Federal Policy Framework for Competency Education: Building Capacity for Systems Change by Maria Worthen and Lillian Pace, February 2014
- Progress and Proficiency: Redesigning Grading for Competency Education by Chris Sturgis, January 2014
- Necessary for Success: Building Mastery of World-Class Skills – A State Policymakers Guide to Competency Education by Susan Patrick and Chris Sturgis, February 2013
- Re-Engineering Information Technology: Design Considerations for Competency Education by Liz Glowa, February 2013
- The Learning Edge: Supporting Student Success in a Competency-Based Learning Environment by Laura Shubilla and Chris Sturgis, December 2012
- The Art and Science of Designing Competencies by Chris Sturgis, August 2012
- It's Not a Matter of Time: Highlights from the 2011 Competency-Based Summit by Chris Sturgis, Susan Patrick and Linda Pittenger, July 2011
- Cracking the Code: Synchronizing Policy and Practice for Performance-Based Learning by Susan Patrick and Chris Sturgis, July 2011
- Clearing the Path: Creating Innovation Space for Serving Over-age, Under-credited Students in Competency-Based Pathways by Chris Sturgis, Bob Rath, Ephraim Weisstein and Susan Patrick, December 2010
- When Success is the Only Option: Designing Competency-Based Pathways for Next Generation Learning by Chris Sturgis and Susan Patrick, November 2010



TOLL-FREE 888.95.NACOL (888.956.2265) DIRECT 703.752.6216 FAX 703.752.6201  
EMAIL [info@inacol.org](mailto:info@inacol.org) WEB [www.inacol.org](http://www.inacol.org)  
MAIL 1934 Old Gallows Road, Suite 350, Vienna, VA 22182-4040

**CompetencyWorks** ISSUE BRIEF

# A K-12 Federal Policy Framework for Competency Education:

## *Building Capacity for Systems Change*

WRITTEN BY:  
Maria Worthen  
Lillian Pace

*February 2014*

## About CompetencyWorks

CompetencyWorks is a collaborative initiative drawing on the knowledge of its partners and advisory board. The International Association for K–12 Online Learning (iNACOL) is the lead organization with project management facilitated by MetisNet. We are deeply grateful for the leadership and support from the partner organizations American Youth Policy Forum, Jobs for the Future, and the National Governors Association. Their vision and creative partnership have been instrumental in the development of CompetencyWorks.

## About iNACOL

The mission of the International Association for K-12 Online Learning (iNACOL) is to ensure all students have access to a world-class education and quality blended and online learning opportunities that prepare them for a lifetime of success. iNACOL is a non-profit organization focused on research; developing policy for student-centered education to ensure equity and access; developing quality standards for emerging learning models using online, blended, and competency-based education; and supporting the ongoing professional development of classroom, school, district and state leaders for new learning models. Learn more at [www.inacol.org](http://www.inacol.org).

## About KnowledgeWorks

KnowledgeWorks is a social enterprise focused on ensuring that every student experiences meaningful personalized learning that allows him or her to thrive in college, career and civic life. By offering a portfolio of innovative education approaches and advancing aligned policies, KnowledgeWorks seeks to activate and develop the capacity of communities and educators to build and sustain vibrant learning ecosystems that allow each student to thrive. Our portfolio includes New Tech Network, EDWorks and StriveTogether. Learn more at [www.knowledgeworks.org](http://www.knowledgeworks.org).



You can learn more about competency education at [CompetencyWorks.org](http://CompetencyWorks.org), as well as find links and materials for all the resources mentioned in this paper on the [CompetencyWorks wiki](#).

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# A K-12 FEDERAL POLICY FRAMEWORK FOR COMPETENCY EDUCATION: Building Capacity for Systems Change

## I. Introduction

The world is rapidly changing, and we must ensure that our education system prepares students to be successful in a future that continues to foster innovation and change in a way that is difficult to predict. Empowered and emboldened by the changes underway, we must take a serious step to reframe quality, accountability, and access to do everything in our power to ensure that each and every student is prepared for their future with a student-centered, world-class education.

It is time to move away from traditional assumptions about how schools should look, how teachers should teach, and how students should learn. These assumptions too often restrict learning to physical buildings, bell schedules, credit hours, and static, paper-based learning materials. Many of these assumptions are further reinforced by federal, state, and local governments that incorporate them through outdated compliance requirements and funding structures.

Our education system must break free from these traditional views so it can adequately prepare students for success in college, career, and the global economy. Fortunately, a growing number of districts and states have begun to think about the next step to increase equity, rigor, and relevance in the system, increasing achievement for students who have been underserved, and opening new opportunities for advancement. Using college- and career-ready standards as the foundation, these innovators envision a system in which students master deeper, aligned competencies that provide graduates with the skills to navigate the demands of an increasingly dynamic global economy. Their success rests heavily on federal adoption of a new student-centered policy framework that will advance the growth of competency education.



You can learn more about competency education at [CompetencyWorks.org](https://CompetencyWorks.org), as well as find links and materials for all the resources mentioned in this paper on the [CompetencyWorks wiki](#).

**Student-centered learning has four distinct elements that explicitly challenge the current schooling and education paradigm:**

- Embracing the [student]’s experience and learning theory as the starting point of education;
- Harnessing the full range of learning experiences at all times of the day, week, and year;
- Expanding and reshaping the role of the educator; and
- Determining progression based upon mastery.

– from the *Jobs for the Future report on Students at the Center (2012)*<sup>1</sup>

## What is Competency Education?

In 2011, iNACOL held a summit on competency education, bringing together educators, instructional leaders, and education advocates who believed in the promise of this new approach to teaching and learning. Participants developed the following working definition of competency education, which this paper uses as its definition:

- Students advance upon mastery.
- Competencies include explicit, measurable, transferable learning objectives that empower students.
- Assessment is meaningful and a positive learning experience for students.
- Students receive timely, differentiated support based on their individual learning needs.
- Learning outcomes emphasize competencies that include application and creation of knowledge, along with the development of important skills and dispositions.<sup>2</sup>

Depending on the state or district, competency education may be called proficiency-based, performance-based, standards-based, or mastery-based education. Although the terminology can vary, these approaches have in common the elements of competency education. Students in these environments receive a personalized education that meets each one at his or her level, providing robust, timely supports and interventions to keep them engaged and on track to college and career readiness.

## HOW DOES COMPETENCY EDUCATION WORK?

*Adapted from “How Does Proficiency-Based Learning Work?” by the New England Secondary Schools Consortium and Great Schools Partnership. Leadership in Action Issue Brief #11; A Briefing Series for New England’s Educational Leaders.<sup>3</sup>*

How is it possible that a student can graduate from high school and yet be unable to read or write well, do basic algebra and geometry, identify major countries on a map, understand how our political system works, or explain the scientific method? While it may be difficult to believe, countless students graduate from high schools every year without the fundamental knowledge and skills they will need to earn a college degree, succeed in the modern workplace, or contribute meaningfully to their communities. How is this possible?

The answer is that many schools do not use teaching, testing, grading, and reporting methods that require students to prove they have actually acquired the most critically important knowledge and skills. In fact, high schools give out thousands of grades, report cards, and diplomas every year, but many of them would not be able to tell you what their students have specifically learned or not learned.

### How it works

- **All students must demonstrate what they have learned before moving on.** Before students can pass a course, move on to the next grade level, or graduate, they must demonstrate that they have learned what they were expected to learn. If students fail to meet learning expectations, they are given more support and instruction from teachers, more time to learn and practice, and more opportunities to demonstrate progress. Until they acquire the most essential skills and grasp the most important concepts, students do not move on to the next level.
- **Teachers are very clear about what students need to learn.** In every class, students know precisely what teachers expect — no guesswork required. The learning expectations for the course are clearly described and communicated, and students will know precisely where they stand throughout the course — for example, a student will know that she has achieved three of six expected learning standards, but that she needs to work harder to achieve the last three before she can pass the course. Importantly, her parents will also know precisely what she’s learned and what she may be struggling to learn.
- **Common, consistent methods are used to evaluate student learning.** In many schools, different learning expectations are applied from course to course, and different methods and criteria are used to evaluate what students have learned. Consequently, one Algebra I course in a school may be very challenging, for example, while another Algebra I course may be comparatively easy — and a B earned in the “difficult” course might actually represent stronger learning achievement than an A in the “easy” course. Proficiency-based learning [i.e., competency education] applies the same standards to all students, while teachers use consistent methods of evaluating and reporting on student learning — everyone knows precisely what grades stand for and what each student has learned. As a result, grades mean the same thing from course to course, and schools can certify that students are prepared when they move on.
- **While learning expectations are fixed, teachers and students have more flexibility.** Even though learning expectations and evaluation methods are common and consistent, teachers can be given more flexibility in how they teach and students can be given more choice in how they learn. For example, teachers don’t need to use the same textbooks, assignments, and tests — as long as their students learn what they need to learn, teachers can develop new and more creative ways to teach. Similarly, students can be given an assignment — research an American president, for example — but they can choose which president to study or how they want to show what they’ve learned (one student may write an essay, while others may create a short documentary using archival photos or an audio podcast in the style of a presidential address). As long as students meet the course expectations — demonstrate a strong understanding of the election system, the executive branch of the federal government, and the role of the American president — teachers can teach and students can learn in the ways that work best for them.

## State and Local Innovation

The current competency education movement can be traced back twenty years to the Chugach, Alaska, school district,<sup>4</sup> which at that time faced grim statistics: 90 percent of its students could not read at grade level and only one student in 26 years had graduated from college. After implementing a new performance-based vision for education, the district saw dramatic gains. In just five years from implementation, average student achievement on the Terra Nova California Achievement Test rose from the bottom quartile to the 72<sup>nd</sup> percentile, the percentage of students participating in college entrance exams rose from zero to 70 percent, and teacher turnover dropped to 2 percent — a striking reversal from its twenty-year history of 55 percent annual teacher turnover.

As Chugach's success took hold, schools and districts around the country began to pilot their own competency-based models. Those with high-quality implementation experienced similar striking results. Barack Obama Charter School in Los Angeles, a K–6 facility in its fourth year of a competency-based implementation, reported a 150-point gain on the California Standards Test from the 2010-11 to the 2011-12 school year.<sup>5</sup> These results are particularly remarkable given that nearly 100 percent of the students are eligible for free and reduced price lunch, 50 percent of the student population changes every year due to high mobility rates, and less than 10 percent of the students were performing at grade level when they entered the school. In another part of the country, Colorado's Adams 50 School District celebrated the exit of its last school from turnaround status this past year. The district implemented a competency-based model three years ago, replacing traditional grades with Levels 1–10 that incorporate standards from elementary school through high school graduation.<sup>6</sup>

With exciting results, and a growing voice of local educators who believe in the approach, a number of states have since removed policy and regulatory barriers to make it possible for local innovators to scale competency education statewide. Thirty-nine states now allow schools to opt out of seat-time requirements for graduation,<sup>7</sup> and in New Hampshire, credit hours have been altogether redefined into competencies.<sup>8</sup> Additionally, some states and districts have begun to engage key stakeholders, including representatives from K–12, higher education, and the workforce to develop competencies aligned to their academic standards.

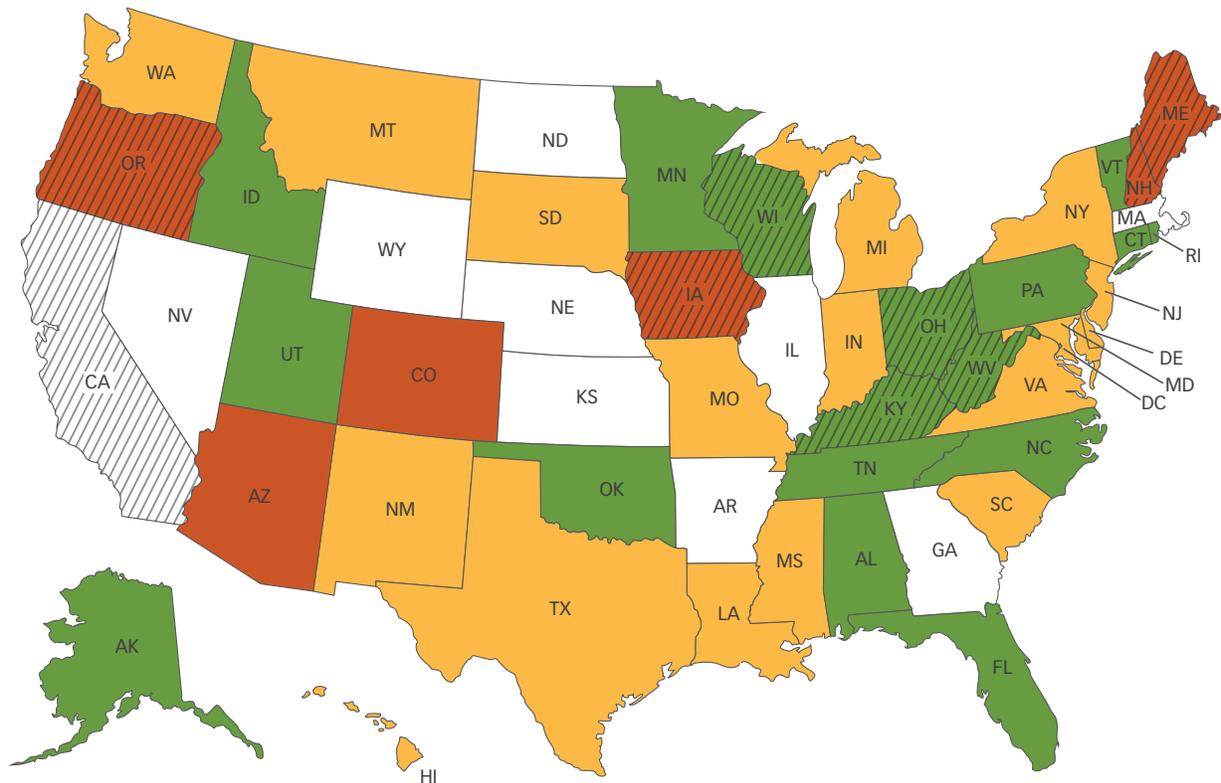
Despite this growing movement, local and state innovators continue to confront a number of federal policy barriers that make it challenging to fully realize their vision to fidelity. Many of these barriers stem from federal accountability and assessment policies, as well as policies for identifying schools for improvement.<sup>9</sup> Equally challenging is the long list of time-bound, compliance-focused federal data requirements that bind states and districts to a traditional culture of teaching and learning.

## An Emerging Federal Role to Build Capacity for Systems Change

The federal government is in a unique position to catalyze and scale student-centered learning approaches — including competency-based education. Federal policymakers can remove barriers, provide funding incentives, develop learning infrastructure, and invest in a cycle of research, development, and evaluation to identify the most effective strategies for student success. While the federal government is an important partner in this transformation, federal policymakers should work collaboratively with local and state leaders to support the emerging work on the ground. Transformation can only succeed with local buy-in, educator collaboration, and a fundamental shift in our expectations and assumptions about what education should look like.

FIGURE 1:

# A Snapshot of Competency Education State Policy Across the United States



**Advanced States**  
Those states with clear policies that are moving towards proficiency-based education; more than just an option.



**Developing States**  
Those states with pilots of competency education, credit flexibility policies, or advanced next gen policies for equivalents to seat-time.



**Emerging States**  
Those states with waivers, task forces.



**ILN States**  
Since its inception, the Innovation Lab Network (ILN) has engaged schools, districts, and state education agencies working to identify through local efforts new designs for public education that empower each student to thrive as a productive learner, worker, and citizen. The state's responsibility is to establish conditions in which innovation can flourish and to develop capacity to sustain and scale what works through policy. The Council of Chief State School Officers (CCSSO) facilitates this network of states to support programmatic, policy, and structure design work within each participating states and across the network.



**No Policies in Competency Education**  
States with seat-time and no competency education policies.



*The CompetencyWorks Briefing Paper Necessary for Success: Building Mastery of World-Class Skills – A State Policymakers Guide to Competency Education (Patrick & Sturgis, 2013) shares information about states implementing competency education and creating a culture of competency within state agencies.*

Federal policymakers can support state and local innovators by establishing a student-centered federal policy framework that supports competency education. This framework should embody the following principles:

- **Greater rigor and relevance** — Measurement of student learning would be based on ensuring that students are on track and held to high, rigorous standards and aligned competencies — from cradle to career — to be successful in college and the workforce.
- **A shift from “one size fits all” to “fits each student”** — All elements of the system, from data systems to accountability, would be built around student learning needs — not those of adults or institutions. In this system, time would be variable and learning constant, unlike our current system in which time-based policies drive most educational decisions. Students would actively engage in their learning, and educators would be prepared to adapt instruction to their needs with robust, multi-tiered supports and universal learning design.
- **Educator empowerment** — Personalized, dynamic, and collaborative instruction would be the hallmark of a system that supports competency education. Educators’ roles would shift as they take a more active role in designing assessments and personalizing instruction to ensure that every student advances along his or her individual learning trajectory. The system would also ensure that educators have the supports, instructional tools, and content to personalize instruction and provide timely supports and interventions.
- **Transparency and equity** — Our current accountability system hides the true extent of the achievement gap. Increased transparency and equity shift the focus to closing the achievement gap and raising the bar for each student. Individual student growth and proficiency measures can be lost in averages, *n* sizes, and cohorts. Assessing students when they enter a program and continuously throughout their learning trajectory is the only way to understand where students are in their learning progressions. This information can help educators understand what students need to do to demonstrate competency, and could ensure that they receive “just in time” supports and interventions to advance at an adequate pace. A system that supports competency education would expand educational opportunity for all students, regardless of their background or challenging circumstances.

## The Federal Education Landscape

Federal involvement in K–12 education dates back to the U.S. Supreme Court’s 1954 *Brown v. Board of Education* decision which effectively ended school segregation. That historic decision gave federal policymakers the responsibility to ensure that disadvantaged students have access to the same high-quality educational opportunities as their peers. Enactment of the Elementary and Secondary Education Act (ESEA) in 1965 further reinforced this role, establishing the Academic Achievement of the Disadvantaged program, better known as Title I, to bridge resource inequities in impoverished communities.

The 2001 reauthorization of the ESEA, No Child Left Behind (NCLB), built on this legacy. The law required schools to report academic achievement data for all student subgroups, shining a much-needed light on the academic achievement of students previously overlooked by the education system. For the first time, many schools were compelled to take a hard look at the quality and opportunities they provided to students with disabilities and English learners, as well as poor and minority students. While NCLB’s legacy of increased transparency and accountability was a step in the right direction, in some respects, it fell short. Schools that failed to make Adequate Yearly Progress (AYP) toward an ambitious goal of 100 percent of students achieving proficiency on state math and English language arts assessments by the year 2014 faced sanctions and targeted school-level interventions that often failed to improve the schools, and which created perverse incentives to target only

“bubble kids” who stood a chance of achieving proficiency on tested skills. Student-level supports — tutoring and the opportunity to attend a different school in the district — proved largely ineffective. A common refrain about NCLB is that it encourages schools to “narrow the curriculum” and forces teachers to “teach to the test.”

As this paper goes to press, federal policymakers have failed to reach agreement on an ESEA reauthorization proposal, although NCLB’s authorization expired in 2007. As such, it remains the law of the land. In lieu of congressional action, the Obama Administration moved forward with a regulatory strategy in 2012 that gave states the opportunity to waive many of NCLB’s accountability provisions in exchange for proposals to adopt college- and career-ready standards, implement teacher and leader evaluation systems, and develop a system for turning around the state’s lowest performing and widest achievement gap schools. Most states have received a waiver from NCLB’s requirements, effectively bypassing many of that law’s central accountability provisions. Even with these waivers, however, states and districts remain largely confined to the traditional framework of NCLB. The next reauthorization of ESEA must remove the barriers and disincentives that stand in the way of student-centered learning.

## About This Paper

This paper provides federal policymakers and advocates with comprehensive, big-picture ideas for transforming federal policy to support the transition to competency-based learning. It is meant to start a dialogue on these issues, posing important questions to explore as policymakers contemplate a new vision for federal education policy through the next reauthorization of ESEA.

This paper is divided into four chapters; each addresses a different federal policy domain.

- **Accountability**  
Federal accountability policies should incent districts, schools, and educators to use real-time, individual student data to tailor instruction, supports, and interventions to ensure that each student is on pace to graduate with mastery of college- and career-ready standards and aligned competencies.
- **Systems of Assessments**  
Flexible, balanced systems of assessments should measure mastery of competencies aligned to standards, with multiple measures, performance assessments, and evidence providing educators with a data-driven guide for prioritizing continuous improvement of student learning to ensure that every student is on pace to graduation.
- **Supports and Interventions**  
The federal government should support states and districts in the development and implementation of a proactive system of supports and interventions that uses real-time data to help students advance to college and career readiness through learning experiences aligned to their personalized learning pathways.
- **Data Systems**  
Student-centered data systems should collect, report, and provide transparent information on where every student is along a learning trajectory based on demonstrating high levels of competency, to help educators customize learning experiences to ensure that every student can master standards and aligned competencies. Data should provide useful information for improving teaching and learning, as well as for accountability and quality purposes.

While this paper addresses four important domains of the education system, there is a need to explore equally important policies on building teacher and leader competency, and on supporting research to pilot, evaluate, and disseminate best practices to ensure that the best knowledge and tools are available for high-quality competency education. Though integrally linked to the elements in this paper, they are substantial topics that merit separate consideration.

## **Structure of This Paper**

Each chapter in this paper follows a similar structure, opening with a big idea to help the reader envision its relationship to a new policy framework for competency education. It then frames the issue, enhanced by a sidebar with a more detailed vision of what the issue would look like in a transformed federal system. The core of each chapter includes a list of federal policy barriers and a menu of policy actions to support the transition to competency education. These policy recommendations include immediate actions that stakeholders at the local, state, and federal levels can implement under current law. We also recommend enabling policies, some of which will require congressional action, and some that can be accomplished through regulatory adjustments to current federal law. The chapters conclude with case studies of early adopters who are finding ways to implement competency education in states, districts, and schools thanks to, or often in spite of, federal policy. Finally, for those who wish to dig a little deeper, we end each chapter with a list of questions for further discussion. It is our hope that this paper will catalyze deep discussions among stakeholders, to advance a new policy framework to transition the federal education system from its current compliance focus to one centered on continuous improvement of student learning.

## FIGURE 2: Enabling Policy Framework for Competency Education





## II. Accountability

**BIG IDEA:** Federal accountability policies should incent districts, schools, and educators to use real-time, individual student data to tailor instruction, supports, and interventions to ensure that each student is on pace to graduate with mastery of college- and career-ready standards and aligned competencies.

An outdated federal accountability system presents significant barriers to widespread implementation of competency education. Despite improvements under No Child Left Behind to increase transparency and support for subgroups of students, the system’s focus on after-the-fact summative tests, time-based elements, annual rankings, and narrow indicators of success have created disincentives for educators who are interested in student-centered learning and accountability policies focused on individual student growth, pace, and achievement. Without federal action, competency-based educators are compelled to maintain parallel accountability systems: one required by federal law and one that aligns with their vision of success for every student.

A paradigm shift must occur to transition the current federal accountability system to one that drives equity and embraces a new vision for the future.

CURRENT FEDERAL SYSTEM	VISION FOR THE FUTURE
Measures school effectiveness by percent proficient on annual state summative assessments in English Language Arts (ELA) and Math	Measures school effectiveness by reporting on multiple measures of student growth and pace along learning progressions in a wide range of subjects
Drives a narrow instructional focus by encouraging states and districts to seek minimum proficiency on tested high-stakes subjects in order to avoid annual sanctions	Drives continuous improvement of student learning to ensure that all students progress toward graduation with the knowledge and skills necessary to succeed in college and career
Expects schools to get 100 percent of students to proficiency on state standards at the same pace	Expects students to master standards and aligned competencies at a sufficient pace to be on track to graduation
Provides annual, after-the-fact data on school performance on state summative assessments	Provides real-time data on student performance, growth, and pace toward mastery of standards and competencies
Provides annual data on subgroup proficiency on state summative assessments	Provides real-time data on subgroup performance, growth, and pace to ensure mastery of standards and competencies
Requires states and districts to use school and subgroup proficiency data to rate schools annually and make decisions about sanctions and supports	Helps educators and instructional leaders make real-time decisions about how to provide personalized supports for every student and school

Provides annual data for parents, students, and other stakeholders about the quality of districts and schools	Provides real-time information for parents, students, and other stakeholders about the quality of educational options and programs, including individual courses
Prevents states and districts from piloting new methods of accountability	Enables states and districts to continuously improve the system by piloting new methods of accountability and quality assurance

The federal government can address the disconnect between the current system and the vision for a student-centered system that supports competency education as it works to modernize federal accountability policies. Policymakers should strive to create an accountability system that builds on the transparency goals of No Child Left Behind while prioritizing deeper learning, encouraging local innovation, and ensuring that all students receive the personalized support they need, when they need it, to graduate college and career ready.

## What are the Federal Policy Barriers?

**Federal time-based accountability policies fail to emphasize continuous improvement of student learning.** Federal law requires states to establish Annual Measurable Objectives (AMOs) for each school and district based in large part on student achievement on annual summative assessments. While it is critical to set rigorous performance goals and benchmarks for all students, these policies emphasize end-of-the-year data collection, which cannot contribute to customized learning supports that drive improvement throughout the year. These time-based calculations make it difficult to address inequities in the system, limiting data about equity to after-the-fact elements such as grade-level performance and proficiency scores on summative assessments.

**Federal law does not include flexibility for states to use multiple measures for federal accountability calculations.** The federal accountability system takes into account annual student achievement in math and English language arts, and annual graduation rates, for all students and subgroups. The U.S. Department of Education’s ESEA waiver extended this to include student achievement in other subjects. While a step in the right direction, this is not codified in federal law.

**Federal accountability indicators do not measure student progress toward mastery of competencies aligned to standards.** The ESEA waiver process permits states to incorporate student growth data into their accountability calculations; however, this regulation doesn’t go far enough to support competency-based learning. States embracing competency education must be able to track student rate of growth and pace toward mastery of college- and career-ready standards to reflect differences in the pace of student learning. These systems should be based on individual students, not cohorts, and should track multiple data points to show a student’s learning trajectory.

**Federal requirements regarding annual classification of schools and districts for improvement can inhibit continuous improvement.** Federal law requires states to use annual accountability data to make annual determinations regarding the classification of schools and districts for interventions and supports. This encourages stakeholders to rely on after-the-fact, summative data rather than incenting continuous improvement of each student, school, and district.

## POLICY SOLUTIONS

### What Are the Opportunities for States Under Current Law?

- Although federal law requires states to implement a time-based accountability system focused explicitly on student achievement of college- and career-ready standards and graduation rates, states can build competency-based elements on top of this system, incorporating measures of student growth, pace, and mastery of competencies.
- States can create additional flexibility regarding how and when students demonstrate mastery of competencies aligned to standards, such as providing multiple opportunities to demonstrate mastery on the summative assessment, and multiple options for which assessments states and districts can use to account for student mastery.

### What Federal Policies Could Enable Change?

- Establish a competency-based accountability pilot program that permits individual states, or states in consortia, to develop systems that drive continuous improvement of student learning using multiple measures, at multiple points in the year.
- Conduct a national evaluation of states piloting competency-based accountability systems to determine their impact on student academic achievement, college readiness, college access and matriculation, and employment outcomes.
- Request a study of all time-based federal policies and regulations, and develop a plan to eliminate or replace these policies with ones that drive continuous improvement of student readiness for college and career.
- Require states to have a plan in place that describes how they will ensure that student progress is identified in real time, and that all students receive the type of instruction, supports, and interventions they need, when they need it.

## Questions for Further Discussion

- How can the federal government shift from an end-of-year, time-based accountability system to a real-time one that drives continuous improvement for all students along a learning trajectory that will ensure college and career success?
- What types of indicators and measures are necessary to track student progress through competencies aligned to standards? How can the system account for social and emotional learning measures to ensure a more robust picture of student readiness?
- What types of indicators, evidence, and measures should trigger federally required supports and interventions? When should federally required supports and interventions occur?
- What changes in reporting are needed to better communicate student progress so that stakeholders will focus on the continuous improvement of learning for all students? What reporting requirements are necessary for each level of the system?
- How could the accountability system account for competency-based elements such as a shift from traditional levels (i.e., middle to high, high to college) to stages of learning across the trajectories and support the emergence of diverse learning pathways?

## EARLY ADOPTER

## Accountability 3.0 – New Hampshire’s Emerging Vision<sup>10</sup>

New Hampshire was the first state in the nation to redefine the credit hour in terms of competency (in 2005), and has since instituted a number of policies to align the state’s education system to student-centered learning. With its approved NCLB waiver up for renewal in the summer of 2014, New Hampshire plans to submit a groundbreaking request that would allow the state to implement a new vision for accountability. This “Accountability 3.0” would enable the state to measure the full range of college- and career-ready knowledge and skills, shift toward personalized learning

approaches such as competency education, and connect meaningful student outcome determinations to ensure that students benefit from aligned, evidence-based supports.

The theory of action underpinning the state’s vision for “Accountability 3.0” is the belief that accountability will be more rigorously applied if developed and “owned” by the district and school. To support that theory, New Hampshire would let districts shape some of their specific accountability goals, within a state framework, to support the community’s vision for teaching and learning. Although the state would administer summative assessments at least once in each of the elementary, middle, and high school grade spans, districts would be expected to incorporate locally and state-developed performance assessments, along with other forms of data, aligned to their accountability plan. The state intends for these localized goals and associated assessments to drive meaningful instruction and increase student engagement.

New Hampshire’s emerging vision for “Accountability 3.0” would incorporate the following innovative policies:

- Incentivize districts to implement local performance assessments in exchange for greater autonomy in selecting accountability indicators and measures across at least four domains: 1) academic, 2) college and career readiness, 3) teacher effectiveness, and 4) school environment.
- Require districts to administer a state summative assessment, at a minimum in grades 4, 8, and at least once in high school to ensure comparability.
- Require districts to establish annual measurable targets for accountability purposes.
- Require districts to demonstrate a clear vision and the capacity for high-quality execution. This process would include a commitment to building leadership and educator capacity, as well as plans to support equity and excellence.
- Establish a locally developed performance assessment pilot for high schools. Participating districts and secondary schools would agree to base their local curriculum on state-developed competencies in core disciplines, develop an accountability system that incorporates performance assessments, administer a required number of state-developed performance tasks within each core discipline, and attend all locally developed performance task validation and scoring calibration sessions.

In addition to the above policies, the New Hampshire Department of Education is exploring strategies to incentivize broader adoption of high-quality personalized learning approaches. The state would accomplish this goal by developing state-approved college- and career-ready competencies in all major academic disciplines, developing a bank of common statewide competency-based performance tasks, and offering technical assistance for validating high-quality local performance assessments.



## III. Systems of Assessments

**BIG IDEA:** Flexible, balanced systems of assessments should measure mastery of competencies aligned to standards, with multiple measures, performance assessments, and evidence providing educators with a data-driven guide for prioritizing continuous improvement of student learning to ensure that every student is on pace to graduation.

While the federal accountability system provides the framework for monitoring performance and identifying appropriate supports and interventions, assessments provide information about what students know and can do. In a high-performing education system, assessments are designed and used for both accountability and instructional purposes.

States and districts implementing competency-based models would benefit from an alignment of federal policies on assessment and accountability, as well as financial support to manage high-quality, performance-based assessments. Although many states have begun to make improvements to their systems of assessments with funding from the federal Race to the Top Assessment Grants program, federal policy continues to emphasize a time-bound system of end-of-year, within-grade summative assessments. Time-bound assessment policies assume that all students will master and demonstrate academic content and skills at the same pace and in the same way — an assumption that can make it challenging to customize learning pathways for all students.

An education system that supports the growth of competency education should emphasize balanced systems of assessments. These systems should integrate multiple measures of student learning to provide

### VISION FOR THE FUTURE

Federal policy should realign to support states in developing systems of assessments that:

- Are aligned to research-based learning progressions or groupings of competencies instead of grade levels or course sequences;
- Are able to measure the pace at which students master competencies in order to track how they are progressing along their learning trajectories;
- Can “roll up” interim assessment data over time to inform summative accountability measures;
- Can be administered whenever students enter a program and again when they are ready to demonstrate mastery of specific competencies;
- Provide students with multiple opportunities to demonstrate mastery of competencies;
- Incorporate performance tasks and other sources of student learning to determine mastery of competencies; and
- Provide standardized, objective validation of student achievement.

These systems of assessments would support educators to:

- Use real-time data to inform instructional practice and continuously improve student performance;
- Design supports and interventions to ensure that each student is on pace to college and career readiness; and
- Score the assessments using standardized and calibrated scoring rubrics and other strategies to ensure inter-rater reliability and comparability of determinations of mastery.

stakeholders with a comprehensive picture of each student’s learning progression. Types of assessments employed in this system could include standardized assessments that measure mastery of college- and career-ready standards, performance tasks that require deeper application of skills, and student-designed projects that give students the opportunity to engage in longer demonstrations of mastery throughout the year.

Competency-based assessments should enable educators to use real-time information on student performance, growth, and pace to customize learning for each student. Assessments should emphasize mastery of knowledge and important skills instead of grade levels, providing students with the support and flexibility to progress through competencies aligned to standards on pace to graduation.

### **Building on Common Core-Aligned Assessments**

*The ongoing development of next generation systems of assessments aligned to college- and career-ready standards is the first step in the transformation to competency education. The assessments currently under development by the federally funded Partnership for Assessment of Readiness for College and Careers (PARCC) and the Smarter Balanced Assessment Consortium (SBAC), for example, will provide educators with timely and meaningful feedback on student mastery of standards. These new systems of assessments will help educators target instruction and supports for students. While these improvements will increase rigor and continuous improvement of the learning environment, additional steps would be needed to bring these assessments in line with a competency education system.*

## **What Are the Federal Policy Barriers?**

**Federal policy does not allow out-of-grade testing for summative accountability purposes and limits the use of student growth data to determine student learning progressions.** Federal law requires states to verify academic performance through annual assessments in grades 3 through 8 and once in grades 10 through 12 for math, English language arts, and science. These assessments are administered at a single point in time and provide after-the-fact data that do not inform instruction. This results in an education system that focuses on annual accountability goals instead of the continuous improvement of student learning. Current assessments that were designed to meet federal requirements do not measure the pace of student learning, do not gauge student mastery of competencies, and, therefore, do not help practitioners pinpoint where students are in their learning progression.

**Federally required assessments were not designed to measure the breadth and depth of competency-based learning.** Federal accountability policies require states to administer one annual assessment in each tested subject and grade, aligned to academic achievement standards. As a result, states interested in a system that supports competency education must develop parallel summative systems of assessments that measure mastery of competencies aligned to standards, or supplement their current systems of assessments with performance-based or educator-developed assessments. This can impose undue time and cost burdens on states and often results in excessive testing practices.

**Federal funding for assessments is inadequate and not aligned to the needs of a student-centered system that supports competency education.** Federal resources for assessment were intended to support the development and administration of annual summative assessments aligned to state standards. With limited federal funding for enhanced assessments, and no prioritization for competency-based systems of assessments, states that wish to develop a more robust system focused on competency education face steep financial barriers.

## POLICY SOLUTIONS

### What Are the Opportunities for States Under Current Law?

- States can adopt assessment policies that accelerate learning by allowing schools to administer summative tests to students who are above their grade level, thereby “banking” their scores for future-year accountability determinations.\*
- States and districts can supplement federal assessment requirements with additional statewide or local performance assessments that are aligned to competencies and provide a more robust picture of student learning. States can incorporate these assessments into the state’s graduation requirements and use the results to guide decisions about supports and interventions

### What Federal Policies Could Enable Change?

- Provide states and districts with federal waiver relief from certain ESEA assessment provisions to pilot flexible assessment policies that support competency-based education. Waivers could permit the use of alternate assessment instruments for summative assessments and the ability to amend annual reporting requirements so students can demonstrate mastery when they are ready throughout the year.
- Establish an assessment pilot program that permits individual states, or states in consortia, to develop and pilot a balanced system of assessments for federal accountability purposes that emphasizes mastery of standards and aligned competencies based on learning progressions instead of grade levels, and provides students with multiple opportunities to demonstrate mastery.
- Provide funding to states, or states in consortia, to develop summative, interim, and formative assessments that measure student achievement against college- and career-ready standards and aligned competencies and that are valid, reliable, and consistent with nationally recognized professional and technical standards.
- Prioritize funding for the development of competency-based state systems of assessments in future competitions of the federal Enhanced Assessment Grants program.
- Request a study to identify current time-based federal reporting requirements that make it difficult for states and districts to implement competency-based assessment strategies, and develop a plan to either provide states and districts with greater flexibility from these barriers or remove them.

\* See *Oregon’s Assessment Inclusion Rules For Accountability Reports* for an example of such a policy <http://www.ode.state.or.us/data/reportcard/docs/asmtinclusionrules1213.pdf>

## EARLY ADOPTER

## Rhode Island – Building a Comprehensive System of Assessments

Policymakers and educators in Rhode Island are working hard to build a high-quality education system focused on the continuous improvement of all students. The state’s vision prioritizes personalized learning and targeted instruction to ensure that all students graduate with the knowledge and skills to succeed. Assessments play a critical role in achieving this vision because they provide educators with real-time information from a variety of sources to inform high-quality instruction.

The state’s 2009 Basic Education Program (BEP)<sup>11</sup> regulations call for implementation in each district of a Comprehensive Assessment System (CAS) “that includes measures of student performance for the purposes of formative, interim, and summative evaluations of all students in each core content area,” and “include assessments of sufficient frequency and relevance as needed to ensure that students have access to diverse pathways to support their Individual Learning Plans.”

The state expects districts to incorporate multiple perspectives and sources of data to help educators understand the full range of student achievement. Practitioners should use this information to evaluate educational programs and practices and make informed decisions related to curriculum and instruction, professional development, and the allocation of resources to better meet students’ needs.<sup>12</sup>

Performance assessments play a critical role in Rhode Island’s Comprehensive Assessment System (CAS), enabling students to demonstrate a higher level of thinking through the application of knowledge and skills. The state requires all high school students to pass a summative performance assessment in order to satisfy the state’s graduation requirements. To satisfy the high school graduation requirements, districts may use an end-of-course performance-based exam, senior project, digital portfolio, Certificate of Initial Mastery (CIM), or similar requirement that demonstrates proficiency on the Rhode Island Grade Level/Grade Span Expectations (GLE/GSE) and applied learning standards.

### Questions for Further Discussion

- How could the timing of state summative assessments vary?
- What policies would ensure that assessments are meaningful for students and educators while also driving school and system improvement?
- How can the federal government assist in the ongoing development of balanced systems of assessments to support competency education at scale?
- Should assessments continue to measure grade-level performance, or is there a more appropriate scope for each assessment that accounts for grade spans or learning progressions?
- What safeguards are necessary to ensure that assessments are high quality, aligned to standards and competencies, and valid for the purposes for which they are used?
- Are the current definitions of formative and summative assessments in law and statute adequate to shape student-centered systems of assessments that support competency education?
- How can federal policy support states to ensure the reliability and validity of performance-based assessments? Would federal resources to support validating processes such as inspectorates be helpful to states?



## iv. Supports and Interventions

**BIG IDEA:** The federal government should support states and districts in the development and implementation of a proactive system of supports and interventions that uses real-time data to help students advance to college and career readiness through learning experiences aligned to their personalized learning pathways.

The federal government has a long history of partnering with states and districts to bridge resource inequities and focus academic support on the students who need it the most. This partnership emerged with the creation of the federal Title I program in the ESEA authorization of 1965, and has evolved significantly over the years as persistent achievement gaps have made it clear that funding alone would not close them. The most recent reauthorization of ESEA, NCLB, attempted to address this problem by holding states and schools accountable for the performance of subgroups of students. A heightened focus on accountability encouraged policymakers and practitioners at all levels of the system to rethink strategies for supporting underperforming schools — through both whole-school improvement models and supports for teaching and learning. This resulted in the rise of federal programs to disseminate evidence-based practices to personalize learning, including multi-tiered systems of support and universal design for learning.

While some practices have helped schools improve, NCLB's district and school improvement policies on the whole have not resulted in all students receiving the support they need, when they need it most. Schools that missed AYP targets had to undergo a series of interventions, based on the length of time they had failed to make AYP. These interventions would escalate each year until a school reached the fifth and final year, then requiring state take-over or restructuring.

### VISION FOR THE FUTURE

The federal government should establish a proactive district and school improvement process that provides students with the personalized supports they need, when they need it most, rather than waiting to intervene a year or two after summative data reveals a problem.

- Federal policy should encourage the development of integrated systems of supports and interventions to ensure that students master essential competencies as they advance through an increasingly transparent education system.
- Federal funding for district and school improvement should align with real-time data on the growth and pace of student mastery to ensure that districts, schools, and other learning providers have the resources they need to customize the learning experience for each student.
- Every student should have access to a personalized learning plan and multiple pathways to ensure mastery of competencies by graduation.
- Federal funding for low-performing schools should ensure that students have access to high-quality, credit-bearing learning experiences, both inside and outside the traditional school system.

Although the recent ESEA waivers provided most states with relief from these provisions, states must now annually identify and intervene in the bottom five percent of schools with the lowest performance and widest achievement gaps. The federal School Improvement Grant (SIG) program provides some resources to help states turn around their lowest performing schools. Some grantees have found innovative ways to use SIG to advance competency education (see the early adopter example below).

All decisions regarding the identification and classification of schools under these policies are made annually, after a school exhibits widespread low student achievement. This time-based approach is a disservice to students who need support the minute they get off-track to graduation. If the federal government adopts the student-focused assessment, accountability, and data system policies recommended in this paper, states, districts, and schools should be able to more readily identify the need for and deploy interventions and supports.

As federal policymakers begin to rethink the federal role in school improvement, they should look closely at the reforms happening in competency-based learning environments. The model's intensive focus on supports and interventions makes it possible to identify warning signs before students get significantly off track. In competency education, the learning experience is personalized and targeted to a student's learning trajectory, pace, and interests. The system should include embedded, tiered, and timely interventions for just-in-time support that leads to successfully meeting or exceeding the learning targets (Shubilla & Sturgis, 2012).

### **ELEMENTS OF A COMPETENCY-BASED SYSTEM OF SUPPORTS AND INTERVENTIONS<sup>13</sup>**

- Interventions are grounded in assessments that are transparent, ongoing, and provide meaningful feedback to support student learning.
- Shorter learning cycles with fewer, more integrated learning targets are developed to allow for immediate intervention and feedback. A continuous improvement system responds to keep students within or above pacing expectations.
- Students and teachers work together to make sense of assessments, learning strengths, and learning needs to guide the development of personalized learning plans.
- A network of learning experiences inside and outside of school support educators and students at various stages of learning, allowing students to demonstrate mastery of competency through anywhere/anytime learning experiences. Adaptive partnerships also provide necessary student services that are beyond the scope of the school and district.
- Blended learning and adaptive digital tools expand options and provide choices for ways students can practice, apply skills, and demonstrate evidence of learning.

Federal policy and funding should incentivize this proactive approach to education. Under this approach, far fewer schools would rise to the level of alarm that requires intensive federal and state intervention. However, in cases requiring intervention, there should be a priority on whole school and whole district competency-based models that employ customized learning experiences with all the supports and opportunities needed to advance upon mastery.

## What Are the Federal Policy Barriers?

**Federal law requires states to annually identify low performing schools based on end-of-year summative data. This creates a reactive system of supports and interventions that leaves few to no resources for preventative practices.** Annual determinations are often too late to help students who are struggling to meet their achievement targets. It can take years for a school to report gains in improvement after selecting a new implementation model, conducting a planning process, developing and hiring new staff, and refining practices to ensure results.

**Monitoring and evaluation of federal grants for school improvement rely on annual data, making it difficult to identify implementation problems early and make necessary adjustments.** Recipients of federal SIG grants must report annual summative assessment data to help the federal government monitor and evaluate the effectiveness of grant funds. A lack of availability and use of ongoing data prevents schools from receiving timely technical assistance from state and district experts.

**The annual classification of underperforming schools and time-based delivery of supports and interventions make it challenging to ensure that current students benefit from reforms.** Federal Title I and SIG programs provide funding to districts to support school improvement activities. While it takes time to structure a high-quality whole school reform, the process does not provide immediate support for current students. They should be afforded similar high-quality learning opportunities.

### POLICY SOLUTIONS

#### What Are the Opportunities for States Under Current Law?

- States can rework their Title I plans to include a robust state and local system of supports and interventions that includes multi-tiered systems of support (e.g., Response to Intervention) and applies competency-based elements such as the development of competencies, student learning objectives, and personalized learning plans to ensure that all students receive support before they end up off-track to graduation.
- States can incorporate competency-based elements into statewide turnaround principles and prioritize competency-based models within the SIG program.
- States can use multiple sources of evidence for identifying and classifying districts and schools in need of supports. States should make every effort to account for student learning pace and differences in student learning progressions.

#### What Federal Policies Could Enable Change?

- Ensure that state Title I plans describe a robust system of supports and interventions that incorporates data on student achievement, growth, and pace in real time to drive resources to districts and schools throughout the year so they can make necessary adjustments to instruction.
- Amend Title I to ensure that states have a plan for supporting districts in the development of personalized learning plans and multiple pathway options for every student.
- Revise policies that classify schools for supports and interventions, replacing annual measures with real-time data on measures that take into account student learning pace and ensure early warning of potential problems.
- Integrate competency-based elements into school and district improvement program application requirements and prioritize applicants that plan whole school and district competency implementations.
- Allocate funding to states and districts for the development of multiple pathway options for students attending schools identified in the state's lowest tier of performance.

## EARLY ADOPTER

## Competency-Based Turnaround in Detroit

In 2011, the non-profit school turnaround organization Matchbook Learning, which targets persistently low-achieving schools using a competency-based turnaround model, launched a blended school model at A.L. Holmes, a bottom-performing, five percent K–8 public school in the Detroit Public School District. The organization leveraged federal SIG funds to implement the model, purchase netbooks and digital content, and place personnel in the school. By 2013, the percentage of students proficient in reading more than doubled (from 22 to 46 percent) and quintupled in math

(from 2.9 to 15 percent), and rising third graders were testing at 67 percent proficient in reading and 35 percent proficient in math. Clearly no longer a bottom five percent school, the State of Michigan recently designated it as a “Reward School.”

In 2012, Matchbook built on this prototype, launching a second model with another bottom five percent K–8 Detroit public school, Brenda Scott. This time the organization partnered with the innovative competency-based district Education Achievement Authority of Michigan. After just one year, this school went from less than one percent of its students achieving proficient in either reading or math to 71 percent and 63 percent of its students making more than a year’s worth of gain in reading and math, respectively.

According to Matchbook’s CEO and founder Sajan George, “[We have] a unique opportunity to disrupt public education by leveraging Federal funds and autonomous operating conditions available to bottom five percent schools to design, implement and eventually scale the very best in competency based, student centered models to the very worst schools with the hopes of flipping the entire trajectory of these bottom performing schools, and eventually the systems they are under.”<sup>14</sup>

### Questions for Further Discussion

- Should federal policy continue to identify schools for supports and interventions, and if so, which indicators should states collect to make those decisions? Which schools should receive support? And which school-wide intervention models best support competency-based supports and interventions?
- If federal policy transitions from school-focused interventions to a competency-based, student-centered system of supports and interventions, how can the system ensure that students trapped in underperforming schools have access to high-quality options? And how can the federal government ensure that all students have access to these options?
- How can the federal government facilitate the alignment of data systems and sharing of data to support coordinated wraparound services that go beyond the school building?
- What incentives can federal policymakers provide for educators to focus supports and interventions on hard-to-serve students, whether they are struggling or advanced, while at the same time ensuring that all students get the supports and interventions they need to progress?



## v. Data Systems

**BIG IDEA:** Student-centered data systems should collect, report, and provide transparent information on where every student is along a learning trajectory based on demonstrating high levels of competency, to help educators customize learning experiences to ensure that every student can master standards and aligned competencies. Data should provide useful information for improving teaching and learning, as well as for accountability and quality purposes.

Competency education depends on the effective use of data to drive continuous improvement of student learning. Exemplary competency models will use data systems and technology to provide educators, students, and parents with immediate information on student performance so that every student has the support and opportunities to graduate college and career ready. The emergence of these models represents a tipping point in our education system. After decades of compliance-based policies and practices, educators are recognizing that data and instructional technologies are powerful tools to personalize instruction and maximize learning. Data become the tools that shape daily instruction instead of static, annual measures used to make punitive decisions about school and student performance.

*After decades of compliance-based policies and practices, educators are recognizing that data and instructional technologies are powerful tools to personalize instruction and maximize learning.*

### VISION FOR THE FUTURE

Federal, state, and local data systems should shift from a primary focus on compliance to a primary focus on continuous improvement of student learning. All data systems should be aligned and focused on supporting the achievement of individual student mastery of standards. Local data should be rolled up into state accountability and compliance systems (rather than compliance systems influencing what is collected and used in accountability systems) to inform decisions about targeting of federal and state resources to support the goal of college and career readiness for all students.

- Federal reporting requirements should transcend grade levels, years, and content so stakeholders can access the most accurate and timely information on student learning in order to make adjustments to instruction and supports.
- States and districts should include robust strategies for meaningful data use and technology integration in their ESEA Title I and Title II plans.
- Data systems should provide valuable feedback to federal, state, and local decision makers about which programs and practices have the greatest impact on student learning.
- Privacy rules (FERPA) should permit the development of portable data records that students and parents can access at any time and share with a variety of educational providers to maximize the quality of learning experiences.

A shift from compliance to continuous improvement will require a new technological infrastructure of data systems aligned at the federal, state, and local levels to support competency-based learning. However, the marketplace has been slow to provide a solution that can connect real-time student learning data seamlessly with state accountability systems to inform decision making at every level of the system. Federal and state policymakers can accelerate demand for these technologies by enacting student-centered accountability policies that require such systems to function. The federal government could also help states and districts underwrite the cost of data infrastructure. This new infrastructure must evolve beyond artificial grade levels, years, and content areas so stakeholders have a complete picture of student mastery.

Many districts have already begun to develop robust platforms that enable educators to access data in real time through a single interface. These platforms integrate student data and learning resources from a number of previously siloed sources so educators can develop learning plans with student input, connect students to aligned instructional resources, assess progress toward mastery, and make necessary adjustments in real time. The following chart includes examples of data elements and core functions embedded within some of the emerging local platforms designed to support competency education.

### **SAMPLE DATA ELEMENTS FOR COMPETENCY-BASED LEARNING PLATFORMS**

- Benchmark student achievement data collected on program entry and throughout learning progressions
- Growth, pace, and proficiency for mastery of aligned competencies
- Growth, pace, and proficiency on social and emotional indicators
- Formative, interim, and summative assessment data
- Portfolio of student work including performance tasks
- Participation and impact of student support services
- Student identified learning preferences and styles
- College and career goals
- Demographic data

### **CORE FUNCTIONS OF DATA SYSTEMS TO IMPROVE STUDENT LEARNING**

- Provide access through a transparent cloud-based platform so educators, parents, and students can access information anytime and anywhere
- Integrate information from a student information system, a learning management system, and formative and summative assessments so educators can develop a personalized learning plan for every student
- Map student progression to proficiency for every aligned competency so educators, students, and parents can track performance in real time
- Integrate student support data so educators and community partners can work together to improve student learning
- Span grade levels, years, and content areas so stakeholders can determine the extent of student mastery independent of time and disciplinary barriers
- Connect students and educators to a wide range of aligned supports
- Provide information on the impact of instructional practices

## What Are the Federal Policy Barriers?

**A compliance-based federal accountability system has created a legacy of compliance-based state and local data systems.** Federal policies that require reporting of data for compliance purposes have resulted in state and local data systems with a primary function of compliance, instead of continuous improvement.

**Federal funding is insufficient to build the technology infrastructure to support competency education at scale.** Compliance-based state data systems do not align with the local data systems and learning management systems emerging to support competency-based models. Alignment of competency-based data systems will require significant start-up investment.

**Lack of federal action to align the accountability system to support student-centered learning means the market has been slow to respond to the needs of states and districts that have taken on this work.** No student information/data system product currently exists that allows real-time individual student data and multiple forms of evidence throughout the year to support data flow of information into a state accountability system for practical accounting to all stakeholders.

### POLICY SOLUTIONS

#### What Are the Opportunities for States Under Current Law?

- States can accelerate development of the technology infrastructure to support competency education by partnering with providers of their choice to develop integrated systems and single interfaces that align a wide range of existing tools and applications focused on the continuous improvement of student learning.
- Districts can explore creative financing strategies to develop and implement integrated student information and learning management systems to support competency-based education. These systems should have the capability to integrate data from a wide range of sources — including formative, interim, and summative assessments — in real time to inform the development and implementation of personalized learning plans.
- States can incent the development of collaborations, or collective impact partnerships, that encourage a wide range of stakeholders to use data to set common goals and drive community resources in support of competency-based pathways for students. These partnerships should have the flexibility to pool funding from siloed programs to invest strategies that have impact.

#### What Federal Policies Could Enable Change?

- Reinvigorate the State Longitudinal Data Systems (SLDS) grant program with an emphasis on the development of an aligned technology infrastructure to support competency education that integrates student information systems, LMS, and assessment functions to support student learning. SLDS should prioritize applicants that have a plan to pilot integration with local technology platforms and to track and report student pace toward proficiency of competencies.
- Provide districts with the resources to develop and implement a technology platform that supports and is aligned with competency education, with the capability to develop personalized learning plans in real time, integrated with LMS and systems of assessments.
- Condition absolute priorities, invitational priorities, or competitive preference priorities focused on data access and use on the development of systems that track student progress toward mastery of competencies in real time.
- Establish a performance pilot program that waives barriers to cross-agency collaboration for entities proposing to serve over-age, under-credited students using promising competency-based strategies. Waivers should encourage streamlining of data systems and reporting requirements.

## EARLY ADOPTER

## Forsyth County Schools EngageME – PLEASE

Forsyth County Schools, a district serving 38,000 students in Atlanta’s metropolitan region, was one of the highest rated applicants in the 2010 inaugural competition of the federal Investing in Innovation Fund (i3) competition. Selected from thousands of applicants, the district received \$4.7 million in federal funds to develop an integrated data system that will help educators personalize learning for all students. The proposed system will integrate three different software applications into one, providing educators and students with access to real-time data to transform instruction and learning.<sup>15</sup>

The project, titled EngageME – PLEASE (Personalized Learning Experiences Accelerate Standards-based Education), will merge information from siloed systems for state and federal reporting, an LMS that includes learning resources and course information, a Student Information System that provides data for multiple other applications such as transportation or food service applications, and Response to Intervention (RTI) assessment data. The project will also include standards-based learner plans and a content management system in which activities and resources are matched based on feedback from the assessment engine and student characteristics such as learning preferences and intervention successes. Forsyth County Schools hopes to develop a system that will serve as a model for other districts interested in personalized learning approaches.

### Questions for Further Discussion

- How can the federal government shift from a compliance-based approach to accountability and reporting to encourage the development of data systems that emphasize continuous student learning?
- Are the 12 Essential Elements for State Longitudinal Data Systems included in the America COMPETES Act sufficient to sustain student-centered data systems that support competency education? If not, what changes or additions are necessary?
- How can the federal government help states and districts build the aligned technology infrastructure to support competency education at scale? Should the federal government play a role in spurring market demand for the development and dissemination of integrated digital platforms and tools that support student-centered, competency-based learning?
- Can the federal government reduce the data collection burden for states and districts by exploring strategies to roll up instructional data already collected and used at the local level to improve student learning?
- As the traditional boundaries between in-school and out-of-school learning become blurred, how can the federal government modernize FERPA requirements to ensure that stakeholders have the information they need to provide quality learning experiences without compromising critical student privacy protections? How can federal privacy rules ensure safe and practicable implementation of data “backpacks” that allow students and parents to link and carry data across schools, courses, and community services?

## vi. Conclusion

America's education system must undergo significant change to provide students with the rigorous and engaging learning experiences that will prepare them for success in college and career. Graduates will require more than just mastery of academic content to succeed. They must have deep knowledge and a broad skill set to navigate an increasingly dynamic and, at times, unpredictable workforce. A shift to competency education will ensure that every student graduates with this strong foundation for success. Although this transformation must originate in schools, districts, and states across the country, stakeholders at every level of the system should engage in a dialogue about shared goals and strategies for high-quality implementation. The more stakeholders are involved in the vision, the greater the potential for sustained impact.

The federal government has a unique and important role to play in the success of competency education. Federal policymakers should embrace this bold vision and work together to remove barriers to innovation so that early adopters can test ideas and scale results. Although there are steps districts and states can take now to advance competency education, the federal government should move quickly but thoughtfully to enact enabling policies that will seed innovation and build capacity for systems change. America's students should not have to wait for incremental change when it is possible to replace today's outdated system with one that is built around the needs and interests of those students. Over time, these enabling policies will provide policymakers with critical information to realign the federal education system so every student has the opportunity to graduate with mastery of competencies aligned to standards.

As policymakers and stakeholders at all levels of the system collaborate on a plan for scaling this work, they should commit to three important goals: 1) To address the system holistically, not one issue or piece of the system at a time; 2) To embed strategies for continuous improvement into every level of the system, investing in the research, dissemination, and scale of best practices; and 3) To design a system that puts students at the center so every program helps produce graduates who will excel in college, careers, and beyond. Adherence to these goals will ensure that policy and practice work together to build a system that will sustain the workforce for generations to come.

## vii. Recommended Readings and Resources

Available from [competencyworks.org](http://competencyworks.org) and [inacol.org](http://inacol.org):

### **Progress and Proficiency: Redesigning Grading for Competency Education**

*Chris Sturgis, January 2014*

This paper explores how districts and schools can redesign grading systems to best help students to excel in academics and to gain the skills that are needed to be successful in college, the community, and the workplace.

### **Mean What You Say: Defining and Integrating Personalized, Blended and Competency Education**

*Susan Patrick, Kathryn Kennedy, and Allison Powell, October 2013*

Explains the nuances of key terms used across the field of K–12 education related to personalized, blended, and competency education, and how the ideas integrate in order to create new learning models.

### **Necessary for Success: A State Policymakers Guide to Competency Education**

*Susan Patrick and Chris Sturgis, February 2013*

Provides an opportunity for state leaders to reflect upon the efforts of contemporaries around the country; shares insights into re-engineering the policy and practices of our K–12 systems; introduces the main concepts behind competency-based learning; studies important initial steps taken by states in introducing this emerging model; and considers creating a culture of competency within state agencies.

### **Re-Engineering Information Technology: Design Considerations for Competency Education**

*Liz Glowa and Susan Patrick, February 2013*

Analyzes and examines components and elements of effective competency-based information systems. Based on interviews and research, the ideas in Re-Engineering Information Technology build upon the lessons learned in analyzing information systems developed by competency education innovators, best practices of systemic approaches to information management, and emerging opportunities. The paper is designed for readers to find those issues that are of most interest to them in their role and be used to catalyze strategies, support new competency-based instructional models, and inform decision making for continuous improvement.

### **The Art and Science of Designing Competencies**

*Chris Sturgis, July 2012*

Discusses how innovators in competency education develop competencies. Often this is referred to as a tuning process or reengineering process — mapping from what we want students to know and be able to do all the way backwards to the choices for curricular tasks and assessments. This paper provides insights into the orientation and processes that innovators use in designing competencies.

Available from [competencyworks.org](http://competencyworks.org) and [inacol.org](http://inacol.org) (continued):

### **It's Not a Matter of Time: Highlights from the 2011 Competency-Based Summit**

*Chris Sturgis, Susan Patrick, and Linda Pittenger, July 2011*

Highlights the key issues from the proceedings at the March 2011 Competency-Based Learning Summit for advancing competency-based learning. The paper addresses the three main goals of the summit:

- Sharing expertise across innovators and policy leaders
- Building a common working definition of competency-based learning
- Enhancing strategies for advancing competency-based options

### **Cracking the Code: Synchronizing Policy and Practice for Performance-Based Learning**

*Susan Patrick and Chris Sturgis, July 2011*

The report sets a policy framework for advancing performance-based learning and builds on recommendations made during the 2011 Competency-Based Learning Summit convened by iNACOL and CCSSO. The report recommends that states begin to transform policies from “rigid compliance” to “enabling policies,” by offering seat-time waivers or “credit flex” policies that allow for the flexibility to offer competency-based learning in K–12. The policy development is multi-stage — building toward a “comprehensive policy redesign” that would require school districts to offer competency-based credits; provide proper training and information systems; establish quality-control; support individual growth models for accountability; and align higher education with K–12 competency-based efforts.

### **Clearing the Path: Creating Innovation Space for Serving Over-age, Under-credited Students in Competency-based Pathways**

*Chris Sturgis, Bob Rath, Ephraim Weisstein, and Susan Patrick, December 2010*

This paper provides guidance on creating competency-based approaches for over-age, under-credited students that have fallen off the track toward graduation. Drawing on a wide range of expertise, this paper explores how states can create space for innovation, including design principles, minimum policy conditions, and options for moving forward.

### **When Success is the Only Option: Designing Competency-Based Pathways for Next Generation Learning**

*Chris Sturgis and Susan Patrick, November 2010*

This paper is an introduction to competency-based pathways, a necessary condition for realizing the potential of next generation learning. The most important finding from this investigation is that competency-based pathways are a re-engineering of our education system around learning — a re-engineering designed for success in which failure is no longer an option. This paper is the first of the series. The following papers (above) from Sturgis and Patrick in 2011 provide a much more detailed exploration into policy and practice for competency-based learning.

Available from [knowledgeworks.org](http://knowledgeworks.org):

### **Federal Innovation Competitions: A Catalyst for Competency Education**

*Lillian Pace, June 2013*

Examines three federal innovation competitions: Race to the Top, the Investing in Innovation Fund, and the Race to the Top-District, to better understand their impact on the growth of competency education.

### **Competency Education Series Policy Brief One: An Emerging Federal Role for Competency Education**

*Lillian Pace, April 2013*

Discusses a federal role for competency education, examples of states doing the groundbreaking work in this area, and an overview of federal accountability and assessment policy barriers that make it challenging to scale competency education.

Available from [aypf.org](http://aypf.org):

### **The Role of Expanded Learning in Competency-Based Education Systems**

*American Youth Policy Forum, September 2013*

Summarizes an AYPF discussion group that provided an opportunity to hear from leaders who are currently incorporating expanded learning opportunities into competency-based systems. Participants discussed and explored the opportunities and challenges inherent in this work.

### **Moving to Mastery: A National Policy Forum on Competency-Based Education**

*American Youth Policy Forum, March 2013*

These video, Powerpoint presentations, and summary of a National Policy Forum, co-sponsored by CompetencyWorks and the International Association for K–12 Online Learning (iNACOL), highlight important research, policy trends, and issues for advancing competency-based education. The forum showcased experts who are leading state and district efforts to transform K–12 student learning using competency-based education, and provided an overview of federal policy issues and recommendations.

Available from [achieve.org](http://achieve.org):

### **Advancing Competency-Based Pathways to College and Career Readiness**

*ACHIEVE, July 2013*

Proposes a state policy framework, focused on graduation requirements, assessment, and accountability. The report is designed to assist states in building a policy structure that contributes to statewide adoption and implementation of competency-based pathways that support all students in reaching college and career readiness, as defined by the Common Core State Standards.

Available from [carnegiefoundation.org](http://carnegiefoundation.org):

### **50-State Scan of Course Credit Policies**

*Taylor White, Carnegie Foundation for the Advancement of Teaching, July 2013*

Provides a comprehensive overview of state credit hour policies.

Available from [nga.org](http://nga.org):

### **State Strategies for Awarding Credit to Support Student Learning**

*National Governors Association, February 2012*

Gives readers a brief overview of how the current system negatively impacts student learning, and how state policy plays a crucial role in competency education, with examples of the policies in different states.

Available from <http://www.maine.gov/doe/>

### **Case Studies of Three Districts in Maine**

*Maine Department of Education*

Describes how school districts, teachers, and communities have explored the potential for customized and competency-based education. The Maine Department of Education has made a series of videos and case studies available to help other districts prepare for their reform process.

Available from [all4ed.org](http://all4ed.org):

### **Strengthening High School Teaching and Learning in New Hampshire's Competency-Based System**

*Mariana Hayes, Alliance for Excellent Education, January 2013*

Provides an in-depth profile of New Hampshire's transition to a competency-based education system.

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## About the Authors

### ***Maria Worthen***

Maria Worthen is Vice President for Federal and State Policy at iNACOL. Prior to joining iNACOL, Maria served as Education Policy Advisor to the Chairman of the Senate Health, Education, Labor, and Pensions Committee, Senator Tom Harkin of Iowa. She also worked at the US Department of Education, serving as Congressional Liaison in the Office of Legislation and Congressional Affairs, Program Officer in the Office of Elementary and Secondary Education, and Presidential Management Fellow in the Office of Safe and Drug-Free Schools. She holds a B.A. in Government and Italian Language and Literature from Smith College and a Masters in Social Work from Washington University in St. Louis.

### ***Lillian Pace***

Lillian Pace is the Senior Director of National Policy for KnowledgeWorks. Prior to joining the foundation, Lillian served as an Education Policy Advisor for the House Education and Labor Committee where she worked on reauthorization of the Elementary and Secondary Education Act. She holds a B.A. in public policy and journalism from Washington and Lee University and a M.P.P. from George Washington University.

## Other Issue Briefs Available at CompetencyWorks

- Progress and Proficiency: Redesigning Grading for Competency Education
- Re-Engineering Information Technology: Design Considerations for Competency Education
- The Learning Edge: Supporting Student Success in a Competency-Based Learning Environment
- The Art and Science of Designing Competencies
- It's Not a Matter of Time: Highlights from the 2011 Competency-Based Summit
- Cracking the Code: Synchronizing Policy and Practice for Performance-Based Learning
- Clearing the Path: Creating Innovation Space for Serving Over-age, Under-credited Students in Competency-based Pathways
- When Success is the Only Option: Designing Competency-based Pathways for Next Generation Learning



TOLL-FREE 888.95.NACOL (888.956.2265) DIRECT 703.752.6216 FAX 703.752.6201  
EMAIL [info@inacol.org](mailto:info@inacol.org) WEB [www.inacol.org](http://www.inacol.org)  
MAIL 1934 Old Gallows Road, Suite 350, Vienna, VA 22182-4040

## Summit Public Schools Cognitive Skills Rubric

Dimension		High-level Description	References to Standards
Textual Analysis (Close Reading)	Theme/Central Idea	Determining <u>theme(s)/central idea(s)</u> and explaining how they develop and interact in a text	CCSS.ELA-LITERACY.CCRA.R.2
	Point of View/Purpose	Understanding the <u>point of view</u> or purpose/intent of an author/speaker and how that point of view or purpose/intent shapes the message or meaning of the text	CCSS.ELA-LITERARY.CCRA.R.6
	Development	Analyzing the development of events, individuals, and ideas/concepts over the course of a text	CCSS.ELA-LITERACY.CCRA.RI.3
	Structure	Analyzing an author's structural writing choices and how they affect the clarity and effectiveness of arguments, explanations, or narratives	CCSS.ELA-LITERACY.CCRA.RI.5
	Word Choice	Analyzing the effect of language, specifically word choice, on the meaning, tone, or mood of a text, and explaining how word choice relates to context or medium	CCSS.ELA-LITERACY.CCRA.RI.4
Using Sources	Selecting Relevant Sources	Selecting sources that support answering a particular research question with <u>relevant, credible</u> information	C3 Framework for Social Studies (D2.His.4-9)
	Contextualizing Sources	Recognizing how a source is situated within the world of its origin (time period, location, culture, etc.) and explaining how the meaning of the source is shaped by those conditions	C3 Framework for Social Studies (D2.His.4-9)
	Synthesizing Multiple Sources	Synthesizing information across multiple sources to support an argument or explanation	
Inquiry	Asking questions	Developing focused, answerable inquiry and research questions	NGSS Science Practice 1: Asking Questions and Defining Problems. CCSS.ELA-LITERACY.CCRA.W.7
	Hypothesizing	Developing hypotheses and predictions	NGSS Science Practice 1: Asking Questions and 3: Planning and Carrying Out Investigations
	Designing Processes and Procedures	Developing step-by-step processes to follow in the course of answering problems/prompts or conducting inquiries/investigations	NGSS Science Practice 3: Planning and Carrying Out Investigations

## Summit Public Schools Cognitive Skills Rubric

	Dimension	High-level Description	References to Standards
<b>Analysis &amp; Synthesis</b>	<b>Identifying Patterns and Relationships</b>	Analyzing and organizing information (including numerical and visual) to answer a question or solve a problem	<b>NGSS Science Practice 4: Analyzing and Interpreting Data</b>
	<b>Comparing/Contrasting</b>	Identifying similarities and differences and using them to support, refine, or sharpen an argument or explanation	
	<b>Modeling</b>	Representing and translating concepts** with models, visual representations or symbols. OR Using appropriate tools to understand and analyze situations and to improve decisions ***"Concepts," in this dimension, refers to abstract situations/information, processes, and systems	<b>NGSS Science Practices 2: Developing and Using Models. CCSS Math Practice 4: Model with Mathematics.</b>
	<b>Interpreting Data/Info</b>	Developing justifiable interpretations of data and/or information from sources	<b>NGSS Science Practice 4: Analyzing and Interpreting Data. CCSS Math Practice 3: Construct Viable Arguments and Critique the Reasoning of Others.</b>
	<b>Making Connections &amp; Inferences</b>	Connecting ideas and making inferences based on evidence or reasoning	<b>CCSS.ELA-LITERACY.CCRA.R.1</b>
	<b>Critiquing the Reasoning of Others</b>	Evaluating arguments, explanations, and solutions, including identifying logical fallacies and missteps	<b>CCSS.ELA-LITERACY.CCRA.R.8 and CCSS Math Practice 3: Construct Viable Arguments and Critique the Reasoning of Others</b>
	<b>Justifying / Constructing an Explanation</b>	Using logic and reasoning to justify a response or explain a phenomenon	<b>NGSS Science Practice 6. Construction Explanations and Designing Solutions, and CCSS Math Practice 3: Construct Viable Arguments and Critique the Reasoning of Others.</b>

## Summit Public Schools Cognitive Skills Rubric

	Dimension	High-level Description	References to Standards
Composing / Writing	<b>Argumentative Claim</b>	Developing a strong argument through clear, well-sequenced claims in argumentative writing or speaking	CCSS.ELA-LITERACY.CCRA.W.1
	<b>Informational / Explanatory Thesis</b>	Constructing explanations or conveying ideas and information through clear, well-organized main and supporting ideas	CCSS.ELA-LITERACY.CCRA.W.2
	<b>Narrative</b>	Developing an oral or written narrative that relates connected experiences, events, procedural steps, or the like (whether they are real or imagined)	CCSS.ELA-LITERACY.CCRA.W.3, CCSS English Language Arts Appendix A
	<b>Counterclaims</b>	Acknowledging and developing alternate or opposing positions	CCSS.ELA-LITERACY.CCRA.W.1
	<b>Selection of Evidence</b>	Using relevant and sufficient <u>evidence</u> to support claims** <i>**In this dimension, which can be applied to both argumentative and explanatory tasks, "claims and subclaims" may also refer to theses/main ideas and supporting ideas.</i>	CCSS.ELA-LITERACY.CCRA.W.1 and 2
	<b>Explanation of Evidence</b>	Analyzing how the selected evidence supports the writer's statements (e.g., claims, subclaims, counterclaims, main ideas, supporting ideas, inferences)	CCSS English Language Arts Appendix A, Definitions of the Standards' Three Text Types
	<b>Integration of Evidence</b>	Representing evidence objectively and accurately (via appropriate quotation, summary, and/or paraphrase) and integrating evidence smoothly and strategically to support an argument, explanation, or analysis	CCSS.ELA-LITERACY.CCRA.W.8
	<b>Organization (Transitions, Cohesion, Structure)</b>	Using paragraph/section structure and transitions to communicate with clarity and coherence	CCSS.ELA-LITERACY.CCRA.W.4
	<b>Introduction and Conclusion</b>	Framing a composition with an effective introduction and conclusion, including using the concluding paragraph(s) to extend ideas	CCSS.ELA-LITERACY.CCRA.W.1 and 2
Speaking & Listening	<b>Discussion / Contribution</b>	Communicating ideas and contributing to discussion through questioning, connecting, and probing	CCSS.ELA-LITERACY.CCRA.SL.1
	<b>Preparation</b>	Entering a discussion or presentation with high-quality evidence (notes, research, connections, questions)	CCSS.ELA-LITERACY.CCRA.SL.1
	<b>Norms / Active Listening</b>	Using roles and norms to support collegial discussions and completion of group work	CCSS.ELA-LITERACY.CCRA.SL.1

## Summit Public Schools Cognitive Skills Rubric

	Dimension	High-level Description	References to Standards
<b>Products &amp; Presentations</b>	<b>Style and Language (Tone, Academic Language, Syntax)</b>	Using appropriate style in a written product, including academic language, tone, and syntax	<b>CCSS.ELA-LITERACY.CCRA.L.3, CCSS.ELA-LITERACY.CCRA.L.6</b>
	<b>Oral Presentation</b>	Using appropriate public speaking strategies to engage the audience and communicate points	
	<b>Multimedia in Written Production</b>	Integrating technology to create high-quality written products	<b>CCSS.ELA-LITERACY.CCRA.W.6</b>
	<b>Multimedia in Oral Presentation</b>	Integrating technology to create high-quality spoken presentations	<b>CCSS.ELA-LITERACY.CCRA.SL.5</b>
	<b>Conventions</b>	Using discipline-appropriate conventions to support clear expression of ideas and information	<b>CCSS.ELA-LITERACY.CCRA.L.1, CCSS.ELA-LITERACY.CCRA.L.2</b>
	<b>Precision</b>	Expressing ideas and information with exactness, specificity, and refinement	<b>CCSS Math Practice 6: Attend to Precision</b>

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Textual Analysis (Close Reading)	Theme / Central Idea	No evidence of identifying a <u>theme or central idea</u> in a text.	<b>Identifies a <u>topic</u></b> in a text and <b>identifies some details that are relevant to that topic.</b>	Identifies a <b>theme/central idea</b> in a text and identifies some details that are relevant to that <b>theme/central idea.</b>	Identifies a <u>theme/central idea</u> in a text and <b>provides a limited explanation of how that theme/central idea is developed through specific details.</b>
	Point of View/Purpose	No evidence of identifying the <u>point of view</u> or purpose or an author/speaker	<b>Describes author's/speaker's <u>point of view</u> or purpose generally or with some inaccuracy.</b>	<b>Accurately</b> describes author's/speaker's <u>point of view</u> or purpose and <b>generally explains how that point of view or purpose/intent is conveyed through details.</b>	Accurately describes author's/speaker's <u>point of view</u> or purpose and <b>clearly explains</b> how that point of view or purpose is conveyed and <b>developed through the use of relevant details in the text. Explains how author's point of view differs from others and, where applicable, how the author acknowledges and responds to conflicting evidence or viewpoints.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Textual Analysis (Close Reading)	Theme / Central Idea	<p>Identifies a <b>major theme/central idea</b> in a text and provides an <b>accurate explanation</b> of how that theme/central idea is developed through specific details.</p> <p><b>Provides some explanation of how the <u>theme/central idea</u> interacts with supporting ideas or other elements in the text (e.g., setting, plot, character).</b></p>	<p>Identifies <b>multiple themes/central ideas</b> in a text and provides an <b>accurate analysis of their development and interaction with each other</b> and with supporting ideas or other elements in the text (e.g., setting, plot, character).</p>	<p>Identifies multiple <b>themes/central ideas</b> in a text and provides a <b>thorough, accurate analysis</b> of their development and interaction with each other and with supporting ideas or other elements in the text (e.g., setting, plot, character).</p> <p><b>Where applicable, interprets theme/central idea through a critical lens or framework.</b></p>	<p>Identifies multiple <b>themes/central ideas</b> in a text and provides a <b>sophisticated analysis</b> of their development and interaction with each other and with supporting ideas or other elements in the text, <b>including an evaluation of which theme/central idea is the most significant and why.</b></p> <p>Where applicable, <b>persuasively</b> interprets theme/central idea through a critical lens or framework.</p>
	Point of View/Purpose	<p>Accurately describes author's/speaker's <u>point of view</u> or purpose and <b>analyzes</b> how that point of view or purpose is conveyed and developed through the use of relevant details in the text. Explains how author's point of view differs from others, including <b>the limitations or biases of the author's/speaker's point of view.</b> Where applicable, explains how the author acknowledges and responds to conflicting evidence or viewpoints.</p>	<p>Analyzes author's/speaker's <u>point of view</u>, including its development, limitations, biases, and differences from and responses to other points of view. <b>Explains how author/speaker uses rhetoric or differences in point of view to create <u>specific effects.</u></b></p>	<p>Analyzes author's/speaker's <u>point of view</u>, including its development, limitations, biases, and differences from and responses to other points of view. <b>Analyzes author's/speaker's use of rhetoric or differences in point of view to create <u>specific effects.</u> Analyzes the effect of cultural experience on author's/speaker's point of view.</b></p>	<p><b>All of Level 7 PLUS: Identifies cases where the rhetoric or the development of point of view is particularly effective and analyzes how the <u>point of view</u> and/or rhetoric contributes to the power, persuasiveness, or beauty of the text.</b></p>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Textual Analysis (Close Reading)	Development	No evidence of analysis of the development of an event, individual, or idea/concept.	Provides a general outline of the development of the key event(s), individual(s), or idea(s)/concept(s) in a text.	Uses specific information in a text to show how a key event, individual, or idea/concept is introduced, explained, and developed in the text.	Explains how events, individuals, and/or ideas/concepts interact within a text and contribute to the development of the storyline or theme/central idea. Analyzes how the text makes connections and distinctions between or among key events, individuals, and/or ideas/concepts.
	Structure	No evidence of structural analysis.	Describes the key organizing features of a text. Explains, in generalities, how a section of text relates to the whole text OR how sections of text relate to each other.	Accurately describes the key organizing features of a text. Explains how a particular sentence, paragraph, or section fits into the overall structure of a text and how it relates to the central idea/theme.	Accurately and thoroughly describes the key organizing features of a text. Analyzes how a particular sentence, paragraph, or section contributes to the development of the central idea/theme of a text.

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Textual Analysis (Close Reading)	Development	<p><b>Analyzes clearly and accurately</b> the development of a <b>complex</b> event, individual (e.g., someone with conflicting motivations) and/or idea/concept within a text. Analysis includes how the complex event, individual, and/or idea/concept is introduced, explained, and developed, and how it connects, is distinguished from, and interacts with other elements in the text.</p>	<p>Analyzes <u>clearly</u> and accurately how <b>a series of events or ideas/concepts unfolds</b> in a text, including when and how they are introduced and developed, the connections between/among them, and how they contribute to the development of the storyline or theme/central idea of the text.</p>	<p>Analyzes <u>clearly</u> and accurately how a <b>complex</b> series of events or ideas/concepts unfolds in a text, including when and how they are introduced and developed, the connections between/among them, and how they contribute to the development of the storyline or theme/central idea of the text.</p>	<p>Analyzes <u>clearly</u> and accurately the development (e.g., introduction, unfolding, connections, interactions) of a complex event, individual, and/or idea/concept <b>or</b> a series of complex events and/or ideas/concepts within a text. <b>Analysis includes an evaluation of the effectiveness of the development.</b></p>
	Structure	<p>Accurately and thoroughly describes the key organizing features <b>and sections</b> in a text. <b>Evaluates the effectiveness of a particular sentence, paragraph, or section in developing the central idea/theme.</b></p>	<p>Accurately and thoroughly describes the key organizing features and sections in a text. Evaluates the effectiveness of <b>particular sections in developing the central idea/theme of a text, as well as other key ideas/claims or elements</b> (e.g., tone, meaning) of a text.</p>	<p><b>Efficiently</b> describes the key organizing features and sections in a text. <b>Evaluates the effectiveness of the overall structure of the text in developing the argument, explanation, or narrative.</b></p>	<p>Efficiently describes the key organizing features and sections in a text. Evaluates the effectiveness of the overall structure of the text in developing the argument, explanation, or narrative, <b>including whether the structure helps makes points clear and/or convincing, and the text engaging. When applicable, proposes structural changes that could improve the development of the argument, explanation, or narrative.</b></p>

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Textual Analysis (Close Reading)	Word Choice	No evidence of analysis of author's word choice.	Explains the difference between a connotative meaning and a denotative meaning of a word in a text. Describes, with some clarity, why an author would pick one word over another in a text.	Identifies words and phrases that impact the meaning or tone of the text; generally explains the meaning of those words and phrases as they are used in the text (including figurative, connotative, and/or technical meanings); provides a limited explanation of how those word choices impact meaning or tone in the text.	Identifies words and phrases that impact the meaning and/or tone of the text; <b>clearly and accurately explains</b> the meaning of those words and phrases as they are used in the text (including figurative, connotative, and technical meanings); <b>explains the impact of those word choices on meaning and/or tone in the text.</b>
Using Sources	Selecting Relevant Sources	Selected sources provide no relevant evidence, or sources lack credibility.	Selects sources that contain some information <u>related</u> to the research topic.	Selects sources that are generally <u>relevant</u> to the research topic and mostly <u>credible</u> but may be too broad or too narrow to fully address the research question. Where applicable, sources have some variety in perspective and/or format.	Selects sources that provide <u>sufficient, credible information relevant</u> to the research question. Where applicable, sources vary in perspective and/or format.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Textual Analysis (Close Reading)		Identifies words and phrases that impact the meaning and tone of the text; <u>clearly</u> and accurately explains the meaning of those words and phrases as they are used in the text (including figurative, connotative, and technical meanings). <b>Clearly explains</b> the impact of those specific word choices on the meaning and/or tone of the text. <b>Generally explains how specific word choices relate to context or medium.</b>	Identifies words and phrases that impact the meaning and tone of the text; <u>clearly</u> and accurately explains the meaning of those words and phrases as they are used in the text (including figurative, connotative, and technical meanings). <b>Explains the cumulative impact of those specific word choices</b> on the meaning and/or tone of the entire text. <b>Clearly</b> explains how specific word choices relate to context or medium.	Identifies words and phrases that impact the meaning and tone of the text; <u>clearly</u> and accurately explains the meaning of those words and phrases as they are used in the text (including figurative, connotative, and technical meanings). <b>Explains the impact of a pattern of word choices on meaning and/or tone, including how patterns of word choice relate to context or medium.</b> Where applicable, <b>generally explains how an author uses or refines the meaning of a key term/concept over the course of a text.</b>	Identifies words and phrases that impact the meaning and tone of the text; <u>clearly</u> and accurately explains the meaning of those words and phrases as they are used in the text (figurative, connotative, and technical meanings). <b>Analyzes the impact of a pattern of word choices on meaning and tone and the relationship between word choice and context or medium.</b> Where applicable, <b>clearly analyzes</b> how an author uses or refines the meaning of a key term/concept over the course of a text.
	Word Choice				
Using Sources		Selects sources that provide <b>detailed</b> , <u>credible</u> information <u>relevant</u> to the research question. Where applicable, sources vary in perspective and/or format.	Selects sources that provide detailed, <b>comprehensive</b> , <u>credible</u> information <u>relevant</u> to the research question. Where applicable, sources vary in perspective and/or format.	Selects sources that provide <b>nuanced</b> , comprehensive, <u>credible</u> information <u>relevant</u> to the research question. Where applicable, sources vary in perspective and/or format. <b>Any gaps or limitations in sources are noted.</b>	Selects sources that provide nuanced, comprehensive, <u>credible</u> information <u>relevant</u> to the research question <b>at a level of detail and complexity appropriate to the audience and purpose of the research.</b> Where applicable, sources vary in perspective and/or format. Any gaps or limitations in sources are noted <b>and the impact of those gaps and limitations is discussed.</b>
	Selecting Relevant Sources				

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Using Sources	Contextualizing Sources	No evidence of contextualizing sources.	Provides <b>partial or inaccurate information about a source's time and place of origin.</b>	Provides <b>accurate</b> information about a source's time and place of origin.	Provides accurate information about a source's time and place of origin and <b>provides some information about the historical, scientific, political, economic, social, and/or cultural conditions of the source's origin.</b>
	Synthesizing Multiple Sources	No evidence of synthesizing information from multiple sources. One source dominates the work.	<b>Information from more than one source is used to support an argument or explanation.</b>	Information from more than one source is used to support an argument or explanation. <b>Sources are described and discussed, but rarely discussed in relation to each other.</b>	<b>Connections among sources are made by comparing information from multiple sources and/or comparing the type of sources (e.g., format, genre, time period, etc.).</b>
Inquiry	Asking questions	No evidence of asking questions	<b>Questions are peripheral to a given topic.</b>	Questions are <b>relevant</b> to specific topic.	Questions are <b>relevant</b> to a specific topic <b>and are testable or researchable.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Using Sources	Contextualizing Sources	Provides <b>accurate</b> information about the historical, scientific, political, economic, social, and/or cultural conditions of the source's origin. <b>Makes connections between these conditions and the contents of the source.</b>	Provides accurate, <b>relevant</b> information about the historical, scientific, political, economic, social, and/or cultural conditions of the source's origin, <b>including (where relevant) events and conditions leading up to or immediately following the source's creation. Generally explains how these conditions shape the meaning or significance of the source.</b>	Provides accurate, <b>relevant</b> information about the historical, scientific, political, economic, social, and/or cultural conditions of the source's origin, including (where relevant) events and conditions leading up to or immediately following the source's creation. <b>Clearly explains</b> how these conditions shape the meaning or significance of the source.	Provides <b>thorough, relevant</b> information about the historical, scientific, political, economic, social, and/or cultural conditions of the source's origin, including (where relevant) events and conditions leading up to or immediately following the source's creation. <b>Uses analysis of these conditions to strengthen and refine an argument or explanation.</b>
	Synthesizing Multiple Sources	Connections among sources are made by <b>grouping similar information/positions from multiple sources</b> or <b>identifying significant differences between sources</b> (in content and/or type).	<b>Information from multiple sources is compared and grouped to deepen or extend an argument or explanation.</b>	Information from multiple sources is compared, grouped, <b>and synthesized with the student's own claims or ideas to form a cohesive, supported argument or explanation.</b>	<b>Significant and nuanced connections are made among the sources</b> and synthesized with the student's own claims or ideas to form a cohesive, supported, <b>compelling</b> argument or explanation.
Inquiry	Asking questions	Questions are <b>valid</b> , testable or researchable, and <b>based on patterns or observations.</b>	Questions are valid, <b>focused</b> , testable or researchable, based on patterns/observations, <b>current research, and/or a specific model or theory.</b>	Questions are valid, <b>precise</b> , testable or researchable, and based on patterns/observations, <b>specific evidence from current research, and/or a specific model or theory.</b>	Questions are valid, <b>precise</b> , testable or researchable, based on patterns/observations, specific evidence from current research and/or a specific model or theory, and <b>push standard thinking on a given topic or in a particular discipline.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Inquiry	Hypothesizing	No evidence of hypothesis or prediction.	<b>Provides a prediction or guess for a hypothesis with limited relationship to the question under investigation.</b>	Provides a prediction or <b>early hypothesis</b> with <b>some relationship</b> to the question under investigation.	<b>Articulates a relevant prediction of the expected results</b> with relation to the question under investigation, but <b>variables are <u>unclearly</u> stated.</b>
	Designing Processes and Procedures	No evidence of an action plan to address the problem/prompt	<b>Generates one or more steps to approach a problem/prompt; steps may be out of order or may not fully address the prompt.</b>	<b>Identifies a starting point</b> to address a problem/prompt and <b>creates useful follow-up steps</b> , though steps may be out of order or may not fully address the prompt.	Identifies a starting point to address a problem/prompt and <b>organizes useful follow-up steps in a logical, sequential order.</b> May not fully address the prompt.
Analysis & Synthesis	Identifying Patterns and Relationships	No evidence of analyzing information or identifying patterns.	<b>Information is organized into structures, but structures are not useful. Only simple patterns are identified, or more complex patterns are identified incorrectly.</b>	Organizes information into <b>mostly useful</b> structures. <b>Identifies patterns with some inaccuracies.</b>	Organizes information into mostly useful structures and <b>accurately identifies patterns.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Inquiry	Hypothesizing	Constructs a <b>testable hypothesis</b> about the investigated question, <b>with a basic description of the variables</b> ("if.. then..."). <b>Hypothesis relates to observation, research, or scientific principle.</b>	Constructs a <b>clear</b> , testable hypothesis about the investigated question, with an <b>accurate description</b> of the variables ("if... then..."). <b>Hypothesis is based on observation, research, scientific principle, model, or theory.</b>	Constructs a <b>precise</b> , testable hypothesis about the investigated question, with an accurate <b>explanation</b> of the relationship between variables ("if... then... <b>because...</b> ") <b>Hypothesis is based on observation, research, scientific principle, model, or theory.</b>	Constructs a <b>precise</b> , testable, and <b>insightful</b> hypothesis about the investigated question, with accurate <b>and thorough</b> explanation of the relationship between variables ("if... then... because"). <b>Hypothesis is based on observation, research, scientific principle, model, or theory.</b>
Inquiry	Designing Processes and Procedures	Creates an <b>orderly action plan</b> that addresses all aspects of a problem/prompt with some inefficiencies.	Creates a <b>clear</b> and orderly action plan that is <b>mostly replicable</b> and addresses all aspects of a problem/prompt in an <b>efficient way. Includes a rationale for some steps or aspects of the plan.</b>	Creates a <b>clear, detailed</b> action plan that is <b>fully replicable</b> and addresses all aspects of a problem/prompt in an efficient way. Includes a rationale for <b>several</b> steps or aspects of the plan. <b>Where applicable, includes some alternate or contingency plans.</b>	Creates a <b>clear, detailed, fully replicable</b> action plan to address a problem/prompt <b>as efficiently as possible.</b> Includes a rationale <b>for the complete plan.</b> Where applicable, <b>acknowledges potential weaknesses or limitations</b> of the plan and includes <b>thorough</b> alternate or contingency plans.
Analysis & Synthesis	Identifying Patterns and Relationships	Organizes information into <b>useful</b> structures. Accurately identifies patterns <b>and some relationships among patterns.</b>	Organizes information into useful structures. Accurately identifies <b>significant/relevant</b> patterns and <b>relationships among patterns.</b>	Organizes information into useful structures. <b>Identifies and explains</b> significant/relevant patterns and the relationships among patterns. <b>Makes note of examples and data that do not fit the pattern(s) or relationship(s).</b>	Organizes information into useful structures. Identifies and explains significant/relevant patterns and relationships among patterns. <b>Identifies and explains</b> examples and data that do not fit the pattern(s) or relationship(s).

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Analysis & Synthesis	Comparing/ Contrasting	No evidence of comparing/contrasting.	Identifies <b>minor or surface-level similarities and/or differences.</b>	Identifies <b>significant</b> similarities and differences.	Identifies significant similarities and differences <b>relevant to a specific claim/main idea/thesis.</b>
Analysis & Synthesis	Modeling	No evidence of using models, visuals, or symbols to represent concepts.	Identifies <b>surface level components of a concept and develops an accurate visual or model; key features of the concept are missing or only partially represented.</b> <b>OR</b> <b>Most key features are represented, with inaccuracies.</b>	Identifies <b>general components</b> of a concept and develops a <b>partially accurate</b> visual and/or model <b>to represent some key features.</b>	Identifies <b>specific components</b> of a concept and develops an <b>accurate</b> visual and/or model to represent <b>most key features.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Analysis & Synthesis	Comparing/Contrasting	Identifies significant similarities and differences <u>relevant</u> to a specific claim/main idea/thesis. <b>Explains in a limited way why the similarities/differences are meaningful within the frame of reference (i.e., the claim/main idea/thesis).</b>	<b>Analyzes or evaluates</b> significant similarities and differences <u>relevant</u> to a specific claim/main idea/thesis. <b>Thoroughly explains</b> why the similarities/differences are meaningful within the frame of reference.  <b>Organizes points of comparison in a logical way.</b>	Analyzes or evaluates significant similarities and differences <u>relevant</u> to a specific claim/main idea/thesis, <b>including an explanation of how the similarities/differences support a specific claim/main idea/thesis.</b>  Organizes points of comparison in a way that <b>supports understanding and analysis.</b>	Analyzes or evaluates significant similarities and differences <u>relevant</u> to a specific claim/main idea/thesis, including an explanation of how the similarities/differences <b>refine or sharpen a specific claim/main idea/ thesis.</b>  Organizes points of comparison in a way that <b>best highlights and frames similarities and differences for analysis and understanding.</b>
	Modeling	Identifies <b>significant</b> components of a concept and develops an accurate visual and/or model to represent <b>key features</b> . <b>Visual or model begins to make visible the relationship of the components to the whole.</b>	Identifies significant components of a concept and develops accurate <b>visual(s) and/or model(s)</b> to represent key features. Visual(s) or model(s) <b>highlight</b> the relationship of the components to the whole and <b>makes visible the relationships among components.</b>	Identifies significant components of a <b>complex concept</b> and develops accurate visual(s) and/or model(s) to represent key features. Visual(s) or model(s) <b>highlight</b> the relationships of the components to the whole <b>and</b> the relationships among components. <b>Model allows for manipulation and/or testing of a proposed idea, process, or system.</b>	<b>Develops and/or uses multiple types of models to accurately represent and manipulate complex concepts.</b> Visuals or models highlight the relationships of the components to the whole and the relationships among the components. <b>Evaluates the merits and limitations of each model and moves flexibly between model types as appropriate to the purpose.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Analysis & Synthesis	Interpreting Data/Info	No evidence of interpretation. May describe or summarize empirical data or information from sources with some inaccuracies.	<b>Describes or summarizes empirical data or information from sources.</b>	<b>Provides some partial or general analysis of data/information. May contain errors.</b>	Provides a <b>reasonable interpretation</b> of data/information. May contain <b>minor errors</b> .
	Making Connections & Inferences	No evidence of inference or making connections.	<b>Makes surface-level inferences that are only generally based on evidence or are too broad, with minimal connection between a specific example and the larger idea.</b>	Makes <b>inferences that are based on evidence</b> but may be <b>partially formed with gaps in explaining the connection of a specific example to the larger idea.</b>	Makes <b>relevant</b> inferences based on evidence and <b>attempts to identify the larger significance of the inference.</b>  Connections between a specific example and the larger idea are <b>clear</b> and <b>appropriate</b> .

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Analysis & Synthesis	Interpreting Data/Info	Provides an <b>accurate interpretation</b> of data/information. <b>Applies some analytic strategies (e.g., sorting, compare/contrast) or concepts (e.g., mean, mode) to characterize the data/information.</b>	Provides an accurate interpretation of data/information. Applies <b>appropriate</b> analytic strategies or concepts to characterize the data/information. <b>Considers the context from which the data/information arose.</b>	Provides a <b>thorough</b> , accurate interpretation of data/information. Applies <b>multiple</b> analytic strategies or concepts to characterize the data/information. Considers the context from which the data/information arose. <b>Recognizes gaps or outliers in the data/information.</b>	Provides a thorough, accurate interpretation of data/information. Applies multiple analytic strategies/concepts and <b>determines which strategy/concept is best for the purpose of the analysis.</b> Considers the context from which the data/information arose. <b>Explains</b> gaps or outliers in the data/information.
	Making Connections & Inferences	Makes <b>clear and relevant</b> inferences based on evidence and <b>partially explains</b> the larger significance of the inference.  <b>Connections to the larger idea are made through multiple examples but may have some gaps in explanation or may not be fully developed.</b>	Makes <b>clear, relevant, thoughtful</b> inferences and <b>explains</b> their larger significance. <b>Where applicable, identifies limitations of inferences based on gaps in evidence.</b>	Makes <b>clear, highly relevant and thoughtful</b> inferences and <b>thoroughly explains</b> their larger significance. Where applicable, identifies limitations of inferences based on gaps in evidence. <b>Uses inferences as the basis for predictions or broader generalizations.</b>  Connections to the larger idea are clearly made through multiple examples, <b>including attempts at non- or counter-examples.</b>	Makes <b>clear, highly relevant, insightful</b> inferences and thoroughly explains their larger significance <b>with sophisticated insight or originality of interpretation.</b> Where applicable, identifies limitations of inferences based on gaps in evidence. Uses inferences as the basis for predictions or broader generalizations.  Connections to the larger idea are clearly made through multiple examples, including non- or counter-examples.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Analysis & Synthesis	Critiquing the Reasoning of Others	No evidence of evaluation. May summarize or restate argument/explanation.	Traces the general arc of an argument or explanation. Begins to evaluate the argument or explanation by making general quality judgments (e.g., "strong" or "weak").	Traces the argument or explanation and identifies specific claims. Evaluates the strength of the overall argument/explanation and some specific claims. Distinguishes claims that are supported by reasons and evidence from claims that are not.	Traces and evaluates the argument/explanation and specific claims, assessing whether the reasoning is logical and/or the evidence is relevant.
	Justifying / Constructing an Explanation	No evidence of justifying or explaining.	Provides mostly description of steps, procedures, or phenomena. Explanation or justification is missing or very limited.	Provides a description of specific steps, procedures, or phenomena and provides some explanation or justification for those steps, procedures, or phenomena.	Provides a logical chain of reasoning to explain or justify specific steps, procedures, or phenomena. Develops explanation/justification with some detail/examples.

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Analysis & Synthesis	Critiquing the Reasoning of Others	Delineates and evaluates the argument/explanation and specific claims, assessing whether the reasoning is <b>valid</b> and/or the evidence is <b>relevant and sufficient</b> . Where applicable, <b>identifies some false statements and fallacious reasoning (logical fallacies)</b> .	<b>Clearly</b> delineates and evaluates the argument/explanation and specific claims, <b>thoroughly</b> assessing <b>in detail</b> whether the reasoning is valid and/or the evidence is <b>relevant and sufficient</b> . Where applicable, identifies false statements and fallacious reasoning (logical fallacies) and <b>considers alternate claims or evidence that would improve the logic of the argument/explanation</b> .	Clearly delineates and evaluates the argument/explanation and specific claims, thoroughly assessing in detail whether the reasoning is valid and the evidence is <b>relevant and sufficient</b> . Identifies false statements and fallacious reasoning and <b>thoroughly explains alternate claims or evidence to improve the logic of the argument/explanation</b> .	<b>All of Level 7 PLUS</b> Identifies and evaluates the <b>appropriateness of the premise(s) or principle(s) on which the argument is constructed, and, where applicable, suggests alternate premise(s) or principle(s)</b> .
	Justifying / Constructing an Explanation	Provides a logical chain of reasoning to explain or justify steps, procedures, or phenomena <b>in support of an overall solution strategy / procedure or a holistic explanation of the phenomenon</b> . Develops explanation/justification with <b>relevant detail/examples</b> .	Applies a <b>specific premise (such as a disciplinary principle, axiom, or theory)</b> to explain or justify a solution, strategy, response, or phenomenon. <b>Fully develops</b> explanation/justification through <b>relevant detail and examples</b> . <b>Acknowledges limitations, tradeoffs, and/or alternate explanations /approaches</b> .	Applies <b>one or more specific premises</b> (such as disciplinary principles, axioms, or theories) to <b>insightfully</b> explain or justify a solution, strategy, response, or phenomenon. Fully develops explanation/justification through detail and examples. <b>Responds to</b> limitations, tradeoffs, and/or alternate explanations/approaches.	<b>Uses a variety of logical strategies</b> and relevant, <b>sufficient</b> detail and examples to develop a <b>sophisticated, persuasive</b> explanation or justification that <b>fully takes into account</b> limitations, tradeoffs, and/or alternate explanations/approaches.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Composing/Writing	Argumentative Claim	Claim is <u>unclear</u> or missing.	Main claim is <b>generally introduced</b> ; subclaims are <b>limited, unrelated, or unclear</b> .	Main claim is <b>clearly introduced</b> ; subclaims are <b>relevant to main claim</b> .	Claims and subclaims are <b>clearly introduced throughout writing</b> and <b>organized so that relationships between claims and subclaims are evident</b> .
Composing/Writing	Informational / Explanatory Thesis	<u>Topic</u> or main idea of writing or speaking is <u>unclear</u> .	<u>Topic of writing or speaking is clear</u> ; main idea/thesis is <b>present but somewhat unclear</b> ; supporting ideas are <b>limited, unrelated, or unclear</b> .	Main idea/thesis is <u>clear</u> ; supporting ideas are <b>relevant to main idea</b> .	Main idea/thesis is <b>clear and focused</b> ; supporting ideas are <b>relevant and organized so that relationships between main idea and supporting ideas are evident</b> .

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Composing/Writing	Argumentative Claim	<p>Claims and subclaims are <u>clearly</u> introduced and organized in a way that <b>makes relationships among claims &amp; subclaims clear</b> and <b>supports the reader's understanding</b>. <b>Some attention is given to the significance of claims.</b></p>	<p>Claims and subclaims are <b>clear, focused, and consistent throughout the writing</b>; the sequencing of the claims and subclaims <b>builds the reader's understanding throughout the writing</b>. <b>The significance of the claims is clearly established.</b></p>	<p>Claims and subclaims are <u>clear</u>, <b>precise</b>, and consistent throughout the writing <b>with some nuance</b>; the sequencing of the claims and subclaims <b>creates a coherent structure</b> that builds the reader's understanding throughout the writing. The significance of the claims is <u>clearly</u> established and <b>developed</b>.</p>	<p>Claims and subclaims are <u>clear</u>, <b>precise</b>, and <b>nuanced</b> throughout the writing; the sequencing of the claims and subclaims creates a <b>complex and coherent</b> structure that builds the reader's understanding throughout the writing. The significance of the claims is <b>clear and persuasive</b>.</p>
Composing/Writing	Informational / Explanatory Thesis	<p>Main idea/thesis is <u>clear</u>, <b>focused</b>, and <b>consistent throughout the writing</b>; supporting ideas are <u>relevant</u>, organized in a way that makes relationships among ideas <b>clear</b> and that <b>supports the reader's understanding</b>.</p>	<p>Main idea/thesis is <u>clear</u> and <b>complex</b>; <u>relevant</u>, <u>sufficient</u> supporting ideas are <b>explicitly connected</b> to main idea and <b>organized logically to create a coherent structure that builds the reader's understanding throughout the writing</b>.</p>	<p>Main idea/thesis is complex, <b>focused</b>, and <b>consistent</b>; <b>highly relevant</b> supporting ideas are <b>tightly connected</b> to the main idea <b>and with each other to create a complex and coherent structure</b> that builds the reader's understanding throughout the writing.</p>	<p>Main idea/thesis is complex, <b>precise</b>, and consistent; <b>significant</b>, highly relevant supporting ideas build on the main idea and on one another <b>in an elegant progression</b> to create a complex and coherent structure that builds the reader's understanding throughout the writing.</p>

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Composing/Writing	Narrative	Orientation, storyline, and/or organization of experiences, events, and/or steps is <u>unclear</u> or missing.	<b>Orientation, storyline, and/or organization of experiences, events, and/or steps are loosely established; experience/event/step sequence may not be logical or unfolds awkwardly; conclusion may be missing.</b>	Orientation (including point of view), storyline, and/or organization of experiences, events, and/or steps are <b>clearly established; organizational sequence is logical or unfolds naturally; narrative techniques are primarily limited to description and/or dialogue; conclusion may be weak.</b>	Orientation (including point of view), storyline, and/or organization of experiences, events, and/or steps are <b>clearly established; organizational sequence is logical, coherent, and/or unfolds naturally; where appropriate, multiple narrative techniques are used (e.g., description, dialogue, pacing, or reflection); description includes some precise vocabulary and some details and/or sensory language; conclusion generally follows from the narrated experiences/events/steps.</b>
		Counterclaims are not acknowledged.	<b>Implicitly acknowledges counterclaims.</b>	<b>Explicitly</b> acknowledges counterclaims.	Explicitly acknowledges counterclaims and <b>clearly distinguishes them from claims.</b>
		No <u>evidence</u> or <u>evidence</u> is completely unrelated to statements.	<b>Selects evidence that minimally supports claims because it is limited or weakly related.</b>	Selects <b>some relevant</b> evidence that supports main claim(s). Evidence for subclaims is still limited or weakly related.	Selects a variety of <b>relevant</b> evidence that <b>generally supports both</b> main claim(s) and subclaims.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Composing/Writing	Narrative	<p>Orientation (including point of view), storyline, and/or organization of experiences, events, and/or steps are <u>clearly</u> established; organizational sequence is logical, coherent, and/or unfolds naturally <b>and smoothly</b>; where appropriate, multiple narrative techniques are used <b>effectively</b> (e.g., description, dialogue, pacing, or reflection); description includes <b>precise vocabulary</b> and, where appropriate, <b>vivid details</b> and sensory language; conclusion <u>clearly follows</u> from the narrated experiences/events/steps.</p>	<p><b>All of Level 5, plus: Uses a variety of techniques to sequence experiences/events/steps so that they build on one another to create a coherent whole, a particular tone and/or mood, and/or a specific outcome.</b></p>	<p><b>All of Level 6, plus: Uses narrative techniques to provide deep insight into the content (personalities and motivations, significance of events, etc.) Develops multiple plots, storylines, or sequences of events/steps.</b></p>	<p><b>All of Level 7, plus: Manipulates pace and other narrative elements to highlight the significance of experience/events/steps or create specific effects.</b></p>
	Counterclaims	<p><b>Develops</b> counterclaims <b>with some evidence or detail</b> and <b>points out their limitations.</b></p>	<p>Develops counterclaims <b>fairly with sufficient evidence or detail</b>, pointing out their <b>strengths and limitations in a way that anticipates the audience's knowledge level and concerns.</b></p>	<p>Develops counterclaims <b>fairly and thoroughly</b> with <u>sufficient</u> evidence or detail, pointing out their strengths and limitations in a way that anticipates the audience's knowledge level, concerns, <b>values, and possible biases.</b></p>	<p>Develops counterclaims <b>fairly and thoroughly</b> with <b>highly relevant</b> evidence or detail; <b>refutes counterclaims thoroughly and strategically, conceding points where appropriate to strengthen the writer's own argument.</b></p>
Composing/Writing	Selection of Evidence	<p>Selects a variety of <u>relevant evidence</u> that is <u>sufficient</u> to support main claim(s); <b>evidence still only generally supports subclaims.</b></p>	<p>Selects a variety of <b>detailed, relevant evidence</b> that is <u>sufficient</u> to support <b>both main claim(s) and subclaims.</b></p>	<p>Selects a variety of detailed, <b>significant evidence</b> that is sufficient to support <b>and develop</b> both main claim(s) and subclaims</p>	<p>Selects <b>the most significant evidence</b> that is <b>highly appropriate to the audience's knowledge of the topic or other concerns</b> to <b>persuasively</b> support and develop both claim(s) and subclaims.</p>

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Composing/Writing	Explanation of Evidence	No evidence of analysis/explanation of selected evidence.	<b>Explanation of how selected evidence supports claims or statements is limited, consisting mostly of repeating, rewording, and/or summarizing the evidence.</b>	Provides <b>mostly relevant analysis</b> that <b>partially explains how selected evidence supports claims or statements</b> ; may still contain some repeating, rewording, and/or summarizing of evidence.	Provides <b>relevant</b> analysis that <b>explains</b> how the selected evidence supports claims or statements; <b>analysis stays rooted in the evidence but at times may be vague, illogical, or overly general.</b>
	Integration of Evidence	No evidence of integrating evidence from sources	<b>Evidence from sources is presented in an <u>unclear</u> or inaccurate way.</b>	Evidence from sources is <b>presented objectively and accurately. Little attention is given to the placement of evidence within the text.</b>	Evidence from sources is presented objectively and accurately <b>and inserted at appropriate points in the text to support an argument, explanation, or analysis.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Composing/Writing	Explanation of Evidence	Provides <b>clear</b> analysis that <b>accurately explains</b> how the selected evidence supports claims or statements.	Provides <b>insightful and clear</b> analysis that <b>thoroughly and accurately</b> explains how the evidence supports claims or statements; <b>where applicable, analysis acknowledges some weakness(es) or gaps in the evidence.</b>	Provides insightful, <b>clear, compelling</b> analysis that thoroughly and accurately explains how the evidence supports claims or statements; where applicable, analysis <b>addresses</b> weakness(es) or gaps the evidence.	Provides insightful, compelling analysis that thoroughly, accurately, <b>and concisely</b> explains how the evidence supports claims or statements; where applicable, analysis <b>clearly addresses</b> weakness(es) or gaps in the evidence; <b>analysis is elegant in its precision and/or sophistication and originality.</b>
	Integration of Evidence	Evidence is presented objectively and accurately, positioned appropriately in the text, and <b>contextualized with introductory and/or explanatory phrases or statements.</b>	Evidence is presented objectively and accurately, positioned and contextualized appropriately, and <b>purposefully excerpted, paraphrased, or summarized to highlight the aspects that are most relevant or important to the argument, explanation, or analysis.</b>	Evidence is presented objectively and accurately, positioned and contextualized appropriately, and excerpted, paraphrased, or summarized strategically. <b>Evidence is integrated into the text in a variety of ways (e.g., breakout quotes, combination of summary and direct quote) that support the argument, explanation, or analysis and develop a consistent tone appropriate to the purpose.</b>	Evidence is presented objectively and accurately and <b>integrated seamlessly and strategically into the text</b> in a variety of ways that support the argument, explanation, or analysis and develop a <b>consistent and sophisticated</b> tone appropriate to the purpose.

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Composing/Writing	<b>Organization (Transitions, Cohesion, Structure)</b>	Individual paragraphs are not organized around one idea. Connections between paragraphs or sections are not evident.	<b>Individual paragraphs are organized around one clear idea or claim; connections between paragraphs or sections are sometimes vague.</b>	<b>Paragraphs or sections are connected around a main idea but do not clearly build on one another. Transition words/phrases are present but are often formulaic.</b>	Paragraphs and/or sections are connected and <b>sequenced to support understanding of ideas</b> . Transitions are <b>varied</b> and are <b>mostly appropriate and effectively used</b> .
Composing/Writing	<b>Introduction and Conclusion</b>	Introduction and/or conclusion are not present	<b>Introduction may include some general background or context information about the topic but does not address main idea(s) or claim(s); conclusion is present but does not summarize, restate, or support the main idea(s) or claim(s).</b>	Introduction includes <b>some background or context information about the topic and generally introduces main idea(s) or claim(s); conclusion restates main idea(s).</b>	Introduction includes <b>related</b> background or context information about the topic and <b>introduces</b> the main idea(s) or claim(s); conclusion <b>logically follows from the content presented and ties back to main idea(s) or claim(s).</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Composing/Writing	Organization (Transitions, Cohesion, Structure)	Paragraphs and/or sections are connected and <b>logically build upon one another to deepen understanding of ideas and clarify relationships among ideas</b> . Transitions are varied and <b>appropriately and effectively used</b> .	Paragraphs and/or sections are connected and <b>clearly and logically</b> build upon one another to deepen understanding of <b>complex</b> ideas and to clarify relationships among those ideas. Transitions are varied and appropriately and effectively used. <b>Sequencing of paragraphs and use of transitions help build cohesion</b> .	Sequencing of paragraphs and/or sections <b>creates a coherent whole that deepens understanding of the content and builds toward a particular outcome</b> . Transitions are appropriate, effective, and <b>varied in their structure and location</b> .	Sequencing of paragraphs or sections creates a coherent whole that deepens understanding of the content and <b>clearly guides the reader toward a particular outcome</b> . Transitions are appropriate, effective, and varied in their structure and location. <b>Sequencing of ideas and transitions is seamless and fluid, and enhances the purpose of the writing</b> .
Composing/Writing	Introduction and Conclusion	Introduction includes <b>relevant</b> background or context information about the topic, introduces main idea(s) or claim(s), and <b>establishes purpose for writing</b> . Conclusion <b>summarizes the content presented and pulls multiple ideas together in relation to the main idea(s) or claim(s)</b> .	Introduction includes <b>relevant and sufficient</b> background or context information about the topic, introduces main idea(s) or claim(s), and establishes purpose for writing; <b>introduction is engaging</b> . Conclusion summarizes, pulls ideas together, and <b>highlights important points</b> of the content presented; <b>when appropriate, conclusion considers some implication(s) of the content presented</b> .	Introduction <b>clearly contextualizes the topic</b> , and <b>clearly establishes</b> the main idea(s) or claim(s) and purpose for writing; introduction is engaging. Conclusion summarizes, highlights, <b>and/or extends ideas as appropriate</b> ; when appropriate, conclusion <b>addresses implications or significance of the content presented</b> .	Introduction <b>clearly and concisely</b> contextualizes the topic and establishes the main ideas(s) or claims(s); introduction clearly establishes the purpose and <b>outlines the structure of the content that follows</b> ; introduction is engaging and <b>inviting</b> . Conclusion <b>strongly supports the content presented by clearly summarizing, highlighting, and/or extending ideas as appropriate</b> ; when appropriate, conclusion <b>clearly addresses implications/significance of and/or acknowledges questions that arise from the content presented</b> .

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Speaking/Listening	Discussion / Contribution	Does not participate in discussions. No evidence of asking questions that elaborate or contribute to conversation.	<b>Mainly restates general points of discussion. Does not connect to the ideas of others. Questions and responses are generally fact-based with minimal use of high-level questioning strategies or higher order thinking.</b>	<b>Expresses some original ideas and makes some connection to the ideas of others.</b> Questions and responses demonstrate <b>some use of</b> high-level questioning strategies and/or higher order thinking.	Expresses original ideas <b>clearly</b> and <b>connects to the ideas of others.</b> Questions and responses are <b>mostly high level. Attempts to move discussion forward by asking and responding to questions.</b>
	Preparation	No evidence of preparation for discussions.	<b>Prepares general notes for discussion. Notes do not include specific connections to key talking points.</b>	Prepares general notes with <b>some specific connections to highlight key talking points.</b>	Prepares specific notes with <b>connections to highlight key areas. Explicitly draws on those notes to probe and reflect on ideas under discussion.</b>
Speaking/Listening	Norms / Active Listening	Does not adhere to established norms for collegial discussions.	<b>Inconsistently adheres to established norms for collegial discussions.</b>	<b>Generally</b> adheres to established norms for collegial discussions. <b>Follows specific goals &amp; deadlines. Enacts individual roles with help as needed.</b>	<b>Mostly</b> adheres to established norms for collegial discussions. <b>Tracks progress toward specific goals &amp; deadlines.</b> Enacts individual roles <b>independently.</b>

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Speaking/Listening	Discussion / Contribution	Expresses original ideas <b>clearly and persuasively</b> ; connects to the ideas of others and <b>builds new pathways of discussion</b> . <b>Attempts to deepen discussion by asking connecting questions or building on the responses of others.</b>	Expresses original ideas <u>clearly</u> and persuasively. Builds new pathways of discussion that are clearly connected to the ideas of others. <b>Propels conversations by relating to broader themes.</b>	Expresses original ideas <u>clearly</u> and persuasively. Builds new pathways of discussion that are clearly connected to the ideas of others. <b>Uses questions and summarization to preserve focus.</b> Propels conversations by relating to broader themes.	Expresses original ideas <u>clearly</u> and persuasively. Builds new pathways of discussion that are clearly connected to the ideas of others. Uses questions and summarization to preserve focus. <b>Propels conversations</b> by relating to broader themes, <b>probing reasoning and evidence and/or promoting divergent and creative perspectives.</b>
		<b>Comes to discussions having read &amp; researched material for teacher-provided questions</b> ; explicitly draws on <b>texts &amp; research to stimulate a thoughtful, well-reasoned exchange of ideas.</b>	Come to discussions with <b>responses and evidence generated with peers through studying, research, or inquiry</b> ; explicitly draws on texts and research to stimulate a thoughtful, well-reasoned exchange of ideas.	Come to discussions with <b>self-generated questions</b> from studying, research, and/or inquiry. <b>Attempts to move discussion along by using those questions at appropriate moments.</b>	Comes to discussions with self-generated, <b>sequenced, specific questions and evidence to move the discussion along purposefully (i.e., toward an intended outcome or desired understanding).</b>
Speaking/Listening	Norms / Active Listening	<b>Adheres to teacher-enforced</b> collegial discussion norms. <b>Facilitates progress</b> toward specific goals & deadlines. <b>Attempts to establish individual roles within the group as needed.</b>	Adheres to teacher- <b>and group enforced</b> collegial discussion norms. <b>Effectively facilitates progress</b> toward specific goals & deadlines. <b>Establishes appropriate</b> individual roles within the group as needed.	Adheres to <b>and helps enforce</b> collegial discussion norms. <b>Sets clear goals &amp; deadline and facilitates conversation and interaction to meet them.</b> <b>Manages</b> individual roles within the group as needed.	Applies collegial discussion norms to promote civil, democratic discussions & decision-making. Sets <u>clear</u> and detailed goals & deadlines and effectively facilitates conversation/interaction to meet them. <b>Efficiently manages individual roles</b> and partnerships within the group as needed.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Products & Presentations	Style and Language (Tone, Academic Language, Syntax)	Does not use formal language.	<b>Begins to use a formal style but includes a significant amount of informal language. Sentence structure frequently obscures meaning.</b>	Uses a formal style <b>most of the time but may include some informal language.</b> Sentence structure is <b>basic and repetitive or uneven and sometimes confusing.</b>	<b>Consistently</b> uses a formal style with <b>some academic or specialized language.</b> Sentence structure is <b>functional; writing may demonstrate strong control over basic sentence structures but limited control over more complex structures.</b>
Products & Presentations	Oral Presentation	No evidence of using appropriate eye contact, adequate volume, or clear pronunciation	<b>Uses minimal eye contact, inconsistent or inappropriate volume, inconsistent pronunciation, and inconsistent or inappropriate body posture.</b>	<b>Attempts to control</b> eye contact, volume, pronunciation, and/or body posture to enhance presentation <b>but may lapse into distracting behaviors at times</b> (too much or not enough eye contact, inappropriate volume, inconsistent pronunciation, or inappropriate body posture--e.g., overly stiff, too much gesticulation).	<b>Uses mostly appropriate</b> eye contact, <b>adequate</b> volume, <b>clear</b> pronunciation, and <b>appropriate</b> body posture (e.g., calm, confident).

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Products & Presentations	Style and Language (Tone, Academic Language, Syntax)	Consistently uses a formal style with <b>consistently appropriate academic or specialized language</b> . Sentence patterns are <b>somewhat varied, with strong control over basic sentence structures and variable control over more complex structures</b> .	Consistently uses a formal style and academic/specialized language <b>when most appropriate but also varies style and language effectively given the purpose, audience &amp; conventions of the writing</b> . Sentence structures are <b>varied and effective</b> .	Consistently uses a formal style and academic/specialized language when most appropriate but also varies style, language, tone, and voice effectively given the purpose, audience & conventions of the writing. <b>Sentence structures are varied and used strategically to enhance meaning by drawing attention to key ideas or reinforcing relationships among ideas</b> .	<b>Style, language, tone, and voice build ethos and high reader engagement</b> . The style, language, tone, and voice are <b>perfectly appropriate to the audience, and effectively accomplish the author's purpose</b> . Sentence structures are varied, used strategically to enhance meaning, <b>and are often powerful or beautiful</b> .
Products & Presentations	Oral Presentation	Uses <b>consistently</b> appropriate eye contact, adequate volume, <u>clear</u> pronunciation, and appropriate body posture (e.g., calm, confident).	Demonstrates consistent control of eye contact, volume, pronunciation, and body posture. <b>Uses some variation in volume and inflection to emphasize key points. Uses some body movements to enhance articulation</b> .	Demonstrates <b>strong</b> control of eye contact, pronunciation, and body posture. <b>Varies volume and inflection to maintain audience interest and emphasize key points. Uses fluid body movements to help audience visualize ideas. May use additional engagement techniques such as humor, anecdotes, rhetorical questions, etc. as appropriate to the context</b> .	Demonstrates strong control of eye contact, pronunciation, and body posture. Varies volume and inflection to maintain audience interest and emphasize key points. Uses fluid body movements to help audience visualize ideas. <b>Demonstrates a particularly engaging voice or style of presentation</b> .

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
Products & Presentations	Multimedia in Written Production	No evidence of integrating technology into writing products.	<b>Uses technology inefficiently or ineffectively to produce/publish writing as well as to interact/collaborate with others.</b>	Uses technology, including the internet, <b>to produce/publish writing, link/cite sources, and interact/collaborate with others.</b>	Uses technology, including the internet, to produce/publish writing, link/cite sources, and interact/collaborate with others <b>effectively and efficiently. Uses technology/media tools to illustrate ideas or show relationships between information/ideas.</b>
	Multimedia in Oral Presentation	No evidence of integrating technology into presentations.	<b>Multimedia components &amp; visual displays in presentation are limited, detract from presentation, and/or do not clarify information and ideas.</b>	<b>Some</b> multimedia components (graphics, images, music, sound) and visual displays <b>help clarify or illustrate information and ideas.</b>	<b>Most</b> multimedia components and visual displays clarify or illustrate information and ideas.
	Conventions	No evidence of using the conventions of the discipline.	<b>Uses the conventions of the discipline with major errors that severely impede understanding.</b>	Uses the conventions of the discipline with a <b>cumulative pattern of minor errors</b> that impede understanding.	Uses the conventions of the discipline with <b>some minor errors</b> that <b>occasionally</b> impede understanding.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
Products & Presentations	Multimedia in Written Production	Uses technology, including the internet, to effectively and efficiently produce, publish, and update <b>individual or shared writing products</b> . Uses <b>appropriate</b> technology/media tools to illustrate ideas or show relationships among information/ideas <b>effectively</b> .	Uses technology, including the internet, to produce, publish, and update individual or shared writing products. Uses <b>appropriate</b> technology/media tools to illustrate ideas or show relationships among information/ideas <b>by taking advantage of technology's capacity to link to other information and to display information flexibly and dynamically</b> .	Uses technology, including the internet, to produce, publish, and update individual or shared writing products. Uses <b>carefully selected</b> technology/media tools creatively to illustrate ideas or show relationships among information/ideas by taking advantage of technology's capacity to link to other information and to display information flexibly and dynamically.	<b>Uses technology beyond commonly used tools to explore novel and effective ways of producing writing products.</b>
	Multimedia in Oral Presentation	Most multimedia components and visual displays clarify or illustrate information and ideas <b>and strengthen arguments, explanations, and/or narratives by highlighting significant points</b> .	<b>All</b> multimedia components and visual displays are <b>purposeful and effective</b> (i.e., clarify, illustrate, and strengthen arguments, explanations, and/or narratives) and <b>add interest to the presentation</b> .	Multimedia components and visual displays are purposeful, engaging, effective, and <b>strategically/efficiently used to enhance understanding</b> of arguments, explanations, and narratives.	Multimedia components and visual displays are purposeful, engaging, effective, and strategically/efficiently used to enhance understanding of arguments, explanations, and narratives. <b>Integration of multimedia into presentation is seamless, engaging, and sophisticated.</b>
	Conventions	Uses the conventions of the discipline <b>appropriately; some minor errors, while noticeable, do not impede understanding</b> .	Uses the conventions of the discipline appropriately <b>with almost no noticeable errors</b> .	<b>Applies</b> the conventions of the discipline <b>consistently to support clear expression of ideas and information</b> . Errors are <b>so few and so minor</b> that the reader would be unlikely to notice them unless specifically looking for them.	Applies the conventions of the discipline consistently <b>and precisely</b> to support <b>clear, sophisticated</b> expression of ideas and information.

## Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	1	2	3	4
<b>Products &amp; Presentations</b>	<b>Precision</b>	No evidence of precision.	<b>Express ideas in very broad or general terms. Does not define terms, symbols, etc.</b>	<b>Mostly</b> expresses ideas with <b>adequate specificity for the given purpose</b> . Defines <b>some</b> terms, symbols, etc.	<b>Consistently</b> expresses ideas with adequate specificity for the given purpose. Defines <b>most</b> terms, symbols, etc.

# Summit Public Schools Cognitive Skills Rubric

Domain	Dimension	5	6	7	8
<b>Products &amp; Presentations</b>	<b>Precision</b>	Consistently expresses ideas with <b>clarity and specificity</b> . <b>Consistently</b> defines terms, symbols, etc.	Consistently expresses ideas with clarity and <b>specific, highly relevant detail</b> . Consistently defines terms, symbols, etc.	Expresses ideas with clarity <b>and efficiency</b> , using <b>no more detail than is needed</b> for the given purpose. Consistently defines terms, symbols, etc.	Expresses ideas and information with <b>near-perfect clarity and efficiency</b> , using no more detail than is needed for the given purpose. Consistently defines terms, symbols, etc. <b>Expression is refined and sophisticated.</b>

## Summit Public Schools Cognitive Skills Rubric

Glossary of Terms	
<b>Clear</b>	Easy to perceive, understand, or interpret. Not causing or allowing doubt.
<b>Credible</b>	Students should use the origin, authority, structure, context, and corroborative value of sources to evaluate their credibility and guide the selection of sources for a given purpose (See C3 Framework for Social Studies, D3.1-2). Additionally, they should critique the usefulness of sources for a specific inquiry based on the sources' authorship, date, place of origin, intended audience, and purpose (See C3 Framework for Social Studies, D2.11). If sources used are not credible, they are not truly relevant or appropriate for answering a research question. Therefore, levels 4-8 in the "Selecting Sources" dimension all demand that information from the selected sources be credible. There may be exceptions at higher levels of study wherein students explicitly identify non-credible sources and examine them for specific purposes.
<b>Evidence</b>	"Evidence" may include relevant facts, definitions, concrete details, data, quotations, or other information and examples appropriate to the audience's knowledge of the topic and the purpose for writing (CCSS.ELA-LITERACY.W.2.b).
<b>Orientation</b>	In a narrative, "orientation" refers to establishing a problem, situation, or observation and its significance as the premise for the narrative; it may also include establishing a narrator or perspective/point of view.
<b>Point of View</b>	"Point of view" refers to the opinion, attitude, or judgment an author has about a subject.
<b>Precise</b>	In general, "precise" is treated in this rubric as indicating a higher level specificity than "focused."
<b>Related</b>	This adjective is used in situations to indicate there is some kind of connection between things. It implies a weaker connection than "relevant."
<b>Relevant</b>	A stronger, more distinctive adjective, "relevant" is applied to important or pertinent information, connections, etc.
<b>Specific Effects</b>	"Specific effects" typically refers to effects on the audience that support the author's purpose. In an argument, one example would be invoking the reader's sympathy through emotional appeals in order to persuade them or gain their support. In literature, it may refer to narrative effects such as suspense, irony, or humor.
<b>Sufficient</b>	We use a legalistic definition, which identifies sufficient evidence as adequate to support the verdict of the jury or a finding of fact by the court (or, in our context, to support a student's claim or interpretation). Evidence is sufficient when it satisfies an unprejudiced mind. In other words, sufficient evidence is <i>adequate</i> --it does not leave you wanting more. The word sufficient does not mean <i>conclusive</i> --conclusive evidence is evidence that serves to establish a fact or the absolute truth of something.
<b>Theme/Central Idea</b>	A statement about a topic, expressed or implied by a text, such as "hardship can make or break a friendship" or "dolphins are regarded as one of Earth's most intelligent species."
<b>Topic</b>	A general concept or subject addressed by a text, such as "friendship" or "dolphins."
<b>Unclear</b>	Not easy to see, hear, or understand. Not definite; ambiguous.

	<b>Not Yet Effective</b>	<b>Developing</b>	<b>Highly Effective</b>	<b>Exemplary</b>
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>Team Culture</b>				
Grit	<i>Often gives up quickly when challenges with scholars or teammates arise or shows visible frustration. Often misses deadlines or is unprepared or unfocused at meetings or PD sessions.</i>	<i>Sometimes persists in the face of challenges or shows visible frustration. Meets most deadlines and is sometimes fully prepared and focused at meetings and PD sessions.</i>	<i>Frequently enjoys the struggle and persists in the face of challenges. Meets nearly all deadlines and is almost always fully prepared for meetings and PD sessions.</i>	<i>Lives for the struggle and consistently persists in the face of challenges. Meets all deadlines and is 100% prepared and focused at meetings and PD sessions.</i>
Relationships	<i>Often does not assume positive intent in teammates. Rarely offers to help a teammate in need.</i>	<i>Sometimes assumes positive intent and apologizes for mistakes. Inconsistently attempts difficult conversations. Sometimes offers to help teammates in need.</i>	<i>Often greets teammates with a smile. Always assumes positive intent. Usually speaks from a place of empathy and apologizes for mistakes. Often initiates difficult conversations and consistently participates respectfully. Frequently helps teammates in need.</i>	<i>Greets everyone in the building with a smile. Always assumes positive intent and speaks warmly from a place of empathy. Apologizes promptly and sincerely embraces difficult conversations. Notices when teammates need help and consistently provides it.</i>
Ownership	<i>Limited understanding of progress toward scholar or PD goals and next steps. Rarely implements feedback in a timely way</i>	<i>Has some understanding of scholar or PD goals and next steps. Frequently implements feedback in a timely way.</i>	<i>Frequently understands and articulates progress toward scholar and PD goals and knows next steps. Consistently implements feedback in a timely way.</i>	<i>Is a school-wide model of understanding and articulating progress toward scholar and PD goals and next steps. Consistently seeks out opportunities to grow as a professional, implements feedback in a timely way, and often uses feedback in one area to improve another area of practice.</i>
Wonder	<i>Rarely demonstrates gratitude, humility and curiosity. Often demonstrates a "fixed" mindset by not setting high standards for self or team or by not demonstrating optimism in ability to achieve them.</i>	<i>Often demonstrates gratitude, humility and curiosity. Sometimes models a growth mindset by setting high standards for self and team and being optimistic about being able to achieve them.</i>	<i>Frequently demonstrates gratitude, humility and curiosity. Frequently models a growth mindset by setting high standards for self and team and being optimistic about being able to achieve them.</i>	<i>Consistently demonstrates gratitude, humility and curiosity. Is a team leader in modeling a growth mindset by setting high standards for self and team and being optimistic about being able to achieve them.</i>
<b>Scholar culture</b>				
Vision	<i>Lack of clear vision for culture leads to leaning heavily on threats and consequences to regulate behavior.</i>	<i>Effectively articulates a positive vision for classroom culture, but does not consistently convey that vision, and/or the vision itself is in some way incomplete.</i>	<i>Generates strong scholar buy-in by effectively articulating a positive vision for classroom culture at the beginning of the year and continually refers to that vision in framing expectations throughout the year and in recognizing and acknowledging when those expectations are met.</i>	<i>Generates exceptional buy-in from scholars about an effectively communicated vision for classroom culture, to the extent that scholars take initiative and actively encourage one another to realize that vision.</i>
Command	<i>Allows for frequent inconsistencies in expectations for scholar behaviors.</i>	<i>Inconsistently authentic or authoritative. Allows for occasional inconsistencies in expectations for scholar behaviors.</i>	<i>Authentic and authoritative presence. Is direct, specific, and tenacious in communicating and enforcing very high expectations.</i>	<i>Model of authentic and authoritative presence. Develops scholar ownership of expectations in addition to being direct, specific, and tenacious in communicating and enforcing very high expectations.</i>
Love & Respect	<i>Is not consistently fair and respectful with scholars and builds positive relationships only with some scholars. On several occasions has used a voice that is either not calm or not firm or uses sarcasm with scholars.</i>	<i>Is fair and respectful with all scholars and builds positive relationships with most scholars. Usually uses a calm but firm and convincing tone when addressing scholar behavior.</i>	<i>Is fair and respectful and builds positive relationships with all scholars that often transfers to scholars showing love &amp; respect for one another. Always uses a calm but firm and convincing tone when addressing scholar behavior.</i>	<i>Has model relationships that stand out school-wide and consistently transfers to scholars showing love &amp; respect for one another.</i>
Urgency	<i>Often loses teaching time due to lack of preparation, lesson momentum, or smooth transitions.</i>	<i>Sometimes loses teaching time due to lack of preparation, lesson momentum, or smooth transitions.</i>	<i>Uses preparation, lesson momentum, and smooth transitions so that no time is lost. The sense of urgency frequently transfers to scholars.</i>	<i>Uses preparation, lesson momentum, and smooth transitions to get the most out of every minute. The sense of urgency consistently transfers to scholars.</i>
Joy	<i>Usually shows some passion for teaching or for content but it rarely transfers to scholars.</i>	<i>Often shows a love of teaching and of the material through actions, words, tone, and facial expressions which sometimes transfers to scholars.</i>	<i>Consistently exudes a love of teaching and of content through actions, words, tone, and facial expressions which often transfers to scholars. Scholars often have "shiny eyes" and visibly demonstrate a love of learning.</i>	<i>Models a love of teaching and a love of content so strongly that it consistently transfers to scholars. Scholars consistently have "shiny eyes" and visibly demonstrate a love of learning.</i>
Engagement	<i>Engagement and participation are uneven or are perfunctory.</i>	<i>Most scholars engage meaningfully in most lessons and independent work. Most scholars participate orally in most lessons.</i>	<i>All scholars engage meaningfully in all lessons and independent work. Almost all scholars participate orally in all lessons.</i>	<i>Has model engagement (including quality of participation and extent of participation). Scholars believe that their participation is valuable to their own learning and the learning of their classmates.</i>
Discourse	<i>Scholars are often allowed to opt out of articulating their thinking clearly or of listening and responding.</i>	<i>Scholars are sometimes allowed to opt out of articulating their thinking clearly and in complete sentences or of listening and responding.</i>	<i>Holds scholars accountable for developing and considering responses, listening and responding to each other, and articulating and revising their thinking, using complete, grammatically correct sentences.</i>	<i>Has model discussions in which scholars believe that it is important to answer thoughtfully and listen to their peers to maximize their own and their classmates' learning. Scholars fully internalize the habits of discussion and often apply them independently in new situations.</i>
Routines	<i>Does not have clear and effective routines for multiple parts of the day.</i>	<i>Routines could be improved, clarified, or enforced more consistently.</i>	<i>Routines are clear, effective, and thoughtful, and maintained all year.</i>	<i>Classroom has model routines and scholars understand and believe in the purpose of the routines.</i>

Mastery	Does not consistently ensure scholars complete and turn in work or holds a low bar for quality or makes frequent exceptions for scholars.	Ensures that all scholars complete and turn in 80%+ of work and sometimes holds a high bar on quality or usually does but the bar is not consistent from scholar to scholar.	Ensures that all scholars complete and turn in all work and usually holds a high bar on quality or always does but the bar is not always consistent from scholar to scholar. Scholars often internalize the standard for mastery and sometimes hold themselves accountable.	Ensures that all scholars complete and turn in all work with a consistent high bar for quality. Scholars fully internalize the standard for mastery and hold themselves accountable to it.
<b>Instruction</b>				
Teacher use of data	Inconsistently uses formal data and rarely collects or uses informal data to drive instruction	Effectively uses formal data and sometimes collects and uses informal data to provide targeted instruction	Frequently collects and uses data from formal and informal assessments to drive highly targeted instruction	Consistently collects and uses data from formal and informal assessments to drive exceptionally targeted instruction.
Scholar use of data	Inconsistently engages students in the process of monitoring their own understanding and achievement.	Engages students in the process of monitoring their own understanding and achievement and attempts to make goals or benchmarks clear and transparent, but students are often unclear how to meet these goals.	Engages students in the process of monitoring their own understanding and achievement and helps make goals or benchmarks clear, transparent, and achievable.	Is a leader school-wide in transferring ownership of achievement to students and ensuring that students know where and how they need to improve their achievement.
Strategic groups	Scholars are rarely grouped strategically	Scholars are often presented the right content at the right time, but it is not uncommon for one or more members of a group to be misplaced. Groupings are partially strategic or have limited basis in data or are rarely changed in response to scholar progress.	Scholars are frequently presented the right content at the right time. Groupings are generally strategic (size and composition), data-driven and change regularly in response to scholar progress.	Scholars are consistently presented the right content at the right time. Groupings are strategic (size and composition), data-driven and changed frequently - sometimes daily - in response to scholar progress.
Planning	Rarely plans a logical sequence of objectives for instructional groups or plans rarely ensure scholars will meet their goals (assuming plans are effectively executed).	Plans a logical sequence of objectives for some instructional groups, or for most groups but the plans are inconsistently logical. The plan will help most scholars meet most of their goals (assuming plans are effectively executed) and is sometimes changed in response to student progress.	Plans a logical sequence of objectives for most instructional groups over several weeks or months. The plan ensures most scholars will meet or exceed most of their goals (assuming plans are effectively executed) and is often changed in response to scholar progress.	Consistently plans a logical sequence of objectives for each instructional group over several weeks or months. The plan ensures all scholars will meet or exceed all their goals (assuming plans are effectively executed) and is frequently changed in response to scholar progress.
Content knowledge - Daily	Has incomplete knowledge of Roots academic content	Understands Roots academic material (learning objectives)	Possesses deep knowledge of Roots instructional content	Uses deep understanding of content knowledge to push learning
Effective questioning	Sometimes asks open ended questions, but struggles to help students place new material	Often asks open ended questions that compel students to think	Frequently asks open ended questions that compel students to think	Asks model questions that get to the heart of the content
The "What and Why"	Struggles to help students place new material	Consistently attempts to help students place new material	Effectively helps students place new material in context	Enables students to connect new material to the big ideas
Sheltering	Language objectives are rarely incorporated into plans and learning is rarely supported by strategic use of visuals and kinesthetics. Scholars are sometimes given authentic opportunities to practice academic language.	Language objectives are sometimes incorporated into plans and learning is often supported by strategic use of visuals and kinesthetics. Scholars are often given authentic opportunities to practice academic language.	Language objectives are often incorporated into plans and learning is frequently supported by strategic use of visuals and kinesthetics. Scholars are frequently given authentic opportunities to practice academic language through at least two modalities (reading, writing, speaking and listening).	Language objectives are woven into long term and daily plans and learning is always supported with strategic use of visuals and kinesthetics. Scholars are consistently given authentic opportunities to practice academic language through at least three modalities (reading, writing, speaking and listening).
Other scaffolding	Scholars are often unable to access challenging objectives and are left frustrated or confused.	Uses scaffolds often to help some scholars master challenging content.	Consistently uses scaffolds that help most scholars master challenging content.	Consistently uses scaffolds that ensure all scholars master challenging content.
Purposeful language	Teacher talk is often excessive or teacher talk is often inadequate to direct the lesson toward a clear objective. Often the teacher is unclear in language.	Teacher talk is occasionally excessive or teacher talk is occasionally inadequate to direct the lesson toward a clear objective. Occasionally the teacher is unclear in language.	Uses clear and purposeful language to: maximize the amount of time students spend talking and thinking about the task at hand; hold students accountable for articulating their thinking; improve the quality of student responses; and deepen understanding.	Is a leader school-wide in balancing between teacher talk and student responsibility during lessons and in directing productive student-student dialogue and debate.
<b>Habits of Success Team supplement</b>				
Personal Learning Plans	Many scholars do not have a current PLP or PLPs do not effectively balance content priorities or few scholars can say what they are working on and why it will help them achieve their big goals.	Most scholars have a current PLP that attempts to balance content priorities. Many scholars can say what they are working on and why it will help them achieve their big goals.	100% of scholars have a current PLP that effectively balances content priorities. Most scholars can say what they are working on and why it will help them achieve their big goals.	100% of scholars have a current PLP that consistently and strategically balances content priorities. All scholars can say what they are working on and why it will help them achieve their big goals.
Grove	Scholars are often off task and need frequent redirection from adults. The volume is often too loud to support a productive use of learning time.	Scholars consistently work on the appropriate activity in the appropriate location. There is a "quiet hum" of scholars learning together that sometimes escalates to a volume that distracts others. Scholars are mostly independent but often need help or redirection from an adult.	Scholars consistently work hard on the appropriate activity in the appropriate location. There is a "quiet hum" of scholars learning together that rarely distracts others. Scholars are mostly independent and rarely need help or redirection from an adult.	Scholars consistently work hard on the appropriate activity in the appropriate location. There is a "quiet hum" of scholars learning together that does not distract others. There is a sense that the adults could leave the room and nothing would change.

Parents as Partners	<i>Inconsistently contacts parents or writes progress report and report card comments that are inadequate for parents to understand their child's progress - or struggles to establish productive communication with several parents.</i>	<i>Sometimes conducts relationship building calls/visits with most parents and effectively engages parents when there is a behavior or academic concern or a report card conference.</i>	<i>Regularly engages parents as partners in their child's education through frequent contact, conferences, report cards, and progress reports. Draws effective limits with chronically difficult parents.</i>	<i>Builds positive and trusting relationships with parents that enable parents to best support their children's academic progress in the long term.</i>
Disrespectful behaviors	<i>Disrespectful behaviors are not consistently addressed in a timely manner or consequences are not executed consistently. Disrespectful behaviors hold steady or increase over time.</i>	<i>All Disrespectful behaviors are promptly addressed. Consequences are consistently and convincingly executed. Most scholars successfully complete a restorative justice cycle. Disrespectful behaviors decrease slightly over time.</i>	<i>All Disrespectful behaviors are promptly addressed. Consequences are consistently and convincingly executed. All scholars successfully complete a restorative justice cycle that often addresses the harm effectively and minimizes lost learning time. Disrespectful behaviors decrease convincingly over time.</i>	<i>All Disrespectful behaviors are promptly addressed. Consequences are consistently and convincingly executed. All scholars successfully complete a restorative justice cycle, often of their own volition, that effectively addresses the harm and minimizes lost learning time. Disrespectful behaviors decrease rapidly.</i>
Autonomy	<i>Scholars rarely earn increasing autonomy over their PLPs and their time in the Grove by demonstrating the appropriate amount of growth in Habits of Success. Scholars are often given autonomy before they are ready or not given it soon enough.</i>	<i>Scholars sometimes earn increasing autonomy over their PLPs and their time in the Grove by demonstrating the appropriate amount of growth in Habits of Success. Scholars are sometimes given autonomy before they are ready or not given it soon enough.</i>	<i>Scholars frequently earn increasing autonomy over their PLPs and their time in the Grove by demonstrating the appropriate amount of growth in Habits of Success.</i>	<i>Scholars consistently earn increasing autonomy over their PLPs and their time in the Grove by demonstrating the appropriate amount of growth in Habits of Success.</i>