

INTRODUCTION

Personalizing the school experience for students can feel like an unachievable goal for educators, but updating our one-size-fits-all system to meet the specific needs of the students we serve could be the most important educational challenge we face. There are no shortcuts when it comes to personalizing education for students. You cannot buy personalized learning. There are no plug-and-play products or platforms for making this shift. Personalized learning is a process and series of decisions schools and districts make to create learning environments more aligned to the interests, identities, and abilities of all students as they achieve mastery of skills and standards at their own pace.

We see vast promise in personalized learning models and believe that new technologies hold the key for making these approaches manageable and sustainable for all teachers to implement. Yet, we find it important to balance the current hype and excitement with the fact that the field is still struggling to develop the right infrastructure necessary to enact authentic change. For educators who want students to progress through standards at their own pace, there is an unfortunate dearth of learning progressions and resources to support these efforts. Leaders who believe the competencies behind self-directed learning and creativity are as important as those connected to math and ELA struggle to articulate, teach, and measure these skills and dispositions. As a nation, the federal Every Student Succeeds Act (ESSA) has helped leaders reconsider traditional testing and accountability practices, yet we are years away from replacing standardized testing with a competency-based model built on performance assessments. Our diverse student populations

require culturally relevant curriculum and culturally responsive instruction, but educators lack the resources and will to support these efforts. As we imagine ways in which breakthrough innovations can better support all these instructional shifts, we honor the complexities of experimenting with tools, strategies, and processes not yet ready for primetime. While the journey often leads to as many rabbit holes as breakthroughs, the good news is every day students, teachers, administrators, and researchers are pioneering, implementing, and documenting advancements in this space. We can point to classrooms, schools, and even entire districts that are significantly improving the student learning experience and generating higher student learning outcomes through viable personalization initiatives. Unfortunately, for every glimpse at success we find a myriad of emerging uncertainties, which require ongoing attention. There is no resting on laurels with personalized learning. It is a constant churn of inquiry, experimentation, and iteration.

Across the field there are broad and varied definitions of personalized learning, but it is not our goal to build consensus around a single version. Instead, we encourage readers to work with definitions that resonate and adapt promising strategies to address current problems of practice. You know your students and families best and understand the instructional shifts that are most important to local stakeholders. You may aspire to create classrooms where students feel known, both culturally and intellectually. Or, you may envision classrooms where each student is consistently challenged within his or her zone of proximal development. We hope this book helps you articulate your priorities and build your school or district capacity for implementation, but, more importantly, we hope it drives genuine analysis and discourse regarding the ideal student experience.

In our model, success is directly linked to what local students, families, and educators value. We have supported personalized initiatives focused on student engagement that have yielded significant increases in attendance and decreases in behavior problems without an emphasis on academic outcomes. We have supported initiatives focused on achievement that have led to substantial increases on state test scores. And, we have supported efforts emphasizing twenty-first-century competencies, such as student agency and critical thinking, that have dramatically increased student self-direction and persistence on rigorous academic work. This book helps leaders define their priorities and find their unique voices in the personalized learning conversation by leveraging an intentional and structured approach to change.

In the chapters ahead, we help you articulate a persuasive vision, define what you value, and clarify the specific shifts you want to see in classrooms. We advise

you to establish an evidence base by collecting and analyzing both qualitative and quantitative data throughout the implementation process. We offer guidance for cultivating buy-in and ownership across all levels of the system as teams build a replication plan that supports all stakeholders. From start to finish, we advocate for adapting our process to meet local needs and moving at a pace aligned to your conditions. Across iterations, pauses, and do-overs, we offer tangible ways to learn from mistakes and build on successes.

Empowering Local Change Agents

This book is designed for education change agents—leaders at the classroom, building, and district level—who believe in the power of personalization and are looking for guidance to effectively implement a new vision for teaching and learning. If you are an education change agent, this book can serve as a road map for transformation. However, first we ask you to check in regarding a few key aspects of this work. Do you believe it is possible to further personalize the current school experience for your students? Do you have the mindset and resourcefulness required to trailblaze a uniquely tailored path? Finally, and most importantly, do you believe in the power of relationships as the engine of change? If your answer to the majority of these questions is no, we advise you to close this book and spend time observing and getting to know the stakeholders in your system before engaging with our framework. If you currently spend the majority of your day running from fire to fire or task to task with your head down in purposeful service—but without pausing to connect and listen to your students, families, or colleagues—you will have a hard time leading this initiative. Relationships are the core of this work. We encourage you to contemplate your relationship readiness before engaging with our change model.

Our framework relies on three central leadership roles. The first is the *lead change agent*, a catalyst for change in a school or district and the point person spearheading the personalized learning effort. The second is the *design team*, a highly engaged group of five to twelve members who are deeply committed to serving as the brain, heart, and soul behind the initial phases of this work. The third set of leaders are *pilot teachers*—talented educators who have the skills and dispositions to test and define aspirational practices. Leaders across these roles must respect the different perspectives, cultures, identities, and social-emotional needs of their stakeholders; otherwise, teachers, students, and families will never buy into or believe in the shifts being promoted. In order for a community to adopt personalized best practices in classrooms, leaders must first walk the walk. When leaders are

unable to articulate why personalized learning is important or when their actions counteract the ideals they are espousing, teams struggle to start and scale the work. There are many small, technical shifts you can make within a classroom, school, or district, but this undertaking, much like the Golden Rule, requires leaders to treat colleagues the way they want colleagues to treat students.

Consider Yanaiza, principal of an urban elementary school in Rhode Island. Yanaiza assumed leadership of her school as a turnaround effort in 2014 and utilized a blended and personalized approach to support transformation. Yanaiza deeply understands the power of culture building and relationships as the backbone of a change initiative. Every morning from 8:30–8:45 a.m., she stands before her school community of students, parents, and educators sharing positive updates, goals met, core values, and a shared vision for how “success will live within their walls for the day.” Yanaiza describes this morning meeting as the heart of her school. Each day approximately sixty parents participate, hearing the same message as the school community. Handshakes are offered at the end of morning meeting to welcome students to the school day with a personal, positive connection. Parents appreciate the direct access they have to their principal, and Yanaiza appreciates the families who are always willing to offer feedback on her ideas. Recently, Yanaiza and her team have been building consensus around a school priority of fully inclusive classrooms. Full inclusion has historically been a controversial topic at the school, and Yanaiza has listened carefully to stakeholder concerns and incorporated this feedback into her pilot planning. She attributes the support she has received from teachers and parents to her constant communication and the trust she has built within her school community. Teachers and families clearly understand the rationale behind this endeavor and believe in the principal they see and speak to every morning.

For schools and districts who start this initiative without a solid culture of respect, communication, and an ability to collaborate, blended and personalized learning will amount to buzzwords, and your colleagues will wait out your initiative with a “this-too-shall-pass” mentality. You can start the work with a small, core team of dedicated educators, but getting to scale with a personalized learning initiative requires knowing and valuing everyone who will eventually engage in this endeavor.

The Pathway to Personalization Framework

For the last five years, we have searched the state and the country for breakthrough examples of blended and personalized learning. By unpacking comprehensive

redesign efforts, amazing data stories, and successful edtech initiatives, we have found solutions of all sizes. We have observed and vetted countless blended and personalized learning strategies, which has enabled us to identify key patterns and groundbreaking approaches that have become the foundation for our Pathway to Personalization Framework.

What has become clear to us through this process is that innovation in the field is not about shiny new products or isolated classroom examples of amazing teacher practice. Instead, innovation is found in a user-centered approach to change management that empowers teachers and students to design, test, and codify their own locally defined personalized learning strategies. Specifically, innovation centers on how leaders learn what aspects of personalization are making a difference for their students and how they create systems to facilitate and expedite faculty adoption of these initial successes.

Divided into five phases—plan, pilot, refine, grow, and network—our framework provides change agents with a sequence of decision points and action steps, along with the tools needed to move from visioning to piloting and testing to replication and scale. While our framework builds on both the successful and failed efforts of pioneer leaders across the state and country, it has also been shaped by lean startup methodology and improvement science research. Consequently, the perspectives of leading change management theorists across various sectors have both validated and enriched our process.

Eric Ries, author of *The Lean Startup*, may seem like an unlikely influencer for a book focused on new pedagogical models, yet our framework is connected to many principles of “lean thinking,” including the piloting of “minimally viable strategies” responsive to “customer” wants and needs; continuous iteration; an understanding of whether to persevere or pivot; and action research loops using solid evaluation cycles.¹ Ries makes the case for a new discipline of entrepreneurial management that can be adapted to fit the managerial challenges of supporting complex and transformational educational change. We integrate components of his vision-steer-accelerate process in our plan and pilot phases.

Much of our change process relies on the leadership of early adopter teachers. The concept of an early adopter was introduced in the 1960s by Everett Rogers, a communication theorist and sociologist who originated the diffusion of innovation theory. Rogers described the spread of good ideas as a social movement, and we leverage his theory throughout our book as leaders contemplate the strengths and needs of teachers who sit at different places along the diffusion of innovation

curve. Geoffrey Moore created a more contemporary lens from this foundation of work. As the author of *Crossing the Chasm*, he uses the diffusion of innovation curve to chart the adoption of innovative technologies and suggests that in order to find mainstream success, products must cross the chasm between early adopters and individuals on the other side.² We use the concept of a chasm to reinforce the idea of a tipping point in the adoption of personalized practices, as well as to demonstrate how practices must be packaged and communicated in order to scale.

Several elements of our framework have been grounded and enhanced by the work of Anthony Bryk, Louis Gomez, Alicia Grunow, and Paul LeMahieu, authors of *Learning to Improve: How America's Schools Can Get Better at Getting Better*.³ The authors identify key missteps—such as top-down management, a focus on quick fixes, and the lack of collective practitioner knowledge base—that have plagued education reform. Calls to action by the authors include the refinement of promising practices, attention to local contexts, variability, and the collection of expertise that can accelerate how a field learns to improve its core work. We lean heavily on the plan-do-study-act (PDSA) cycles advocated by Bryk and colleagues throughout our pilot and refine phases and also employ their crucial concept of networked improvement communities (NICs) as the culminating phase of our framework.

In their 2016 book, *Innovation and Scaling for Impact: How Effective Social Enterprises Do It*, Christian Seelos and Johanna Mair argue that innovation is not simply the creation of something new, but the connection of a valuable idea to a process for scaling and generating impact.⁴ Many education “innovations” have died on the vine over the years, and the demise of promising strategies can be linked to innovation uncertainties that Seelos and Mair discuss, as well as to innovation pathologies that limit an organization’s capacity for impact. The frameworks Seelos and Mair developed to diagnose potential stumbling blocks—as well as their emphasis on “learning as the main requirement for productive innovation”—closely align with our process for change, and we return to their lessons in the refine and grow phases of our framework.

The final piece of inspiration for our framework comes from John Kotter, retired professor of leadership at Harvard Business School. Kotter has studied how over one hundred companies have made fundamental shifts in their businesses to cope with changing market environments. In his white paper, “Leading Change: Why Transformation Efforts Fail,” Kotter outlines eight steps for successfully transforming an organization and how critical errors at each level can derail a change initiative.⁵ The majority of his steps translate very well into an education realm

and help us emphasize the importance of essential moves across elements of our framework.

This combination of ideas and theories has enriched our process for change and encouraged us to experiment with high-impact practices that have revolutionized other fields.

How This Book is Organized

After introducing readers to the five phases in our framework in chapter 1, subsequent chapters are organized into five sections, corresponding to each phase of the framework. Each chapter in the book highlights a series of sequential decisions and activities, enabling lead change agents, design teams, and pilot teachers to operationalize relevant and meaningful personalized learning initiatives. We support these steps by providing essential templates, timelines, examples, and artifacts to help teams accomplish this work, as well as offer engaging examples and case studies of successful implementation. We have also created a resource website that provides live links to the specific organizations and resources discussed in each chapter. References to the website, which can be accessed at pathwaystopersonalization.com, are made within chapters.

Our Goal

Personalized learning models seek to transform and revolutionize an educational system that has been entrenched for almost two hundred years. This is a daunting and formidable undertaking. We deeply believe in the promise of personalized learning and, simultaneously, we believe change management approaches to transformation must also be personalized. Yet, there are no quick fixes or silver-bullet solutions within these pages. We recommend navigating this book slowly and taking time to react, respond, and discuss our tactics and how they align to your reality. We encourage readers to learn the process in its entirety before assembling a team and identifying a comfortable starting point. Our framework is not an all-or-nothing proposition. We encourage change agents to adapt, test, and use our process to design a path forward that is aligned to local strengths and needs. Simultaneously, we hope readers will push themselves and their colleagues to undertake some of our more challenging framework elements. It is our hope that stakeholders across educational ecosystems who are ready to reimagine education will find guidance and support for realizing their aspirational visions in this book. There has never been a more exciting time to be working in this field.