Personalizing the Paths to Personalized Learning: Meeting Students and Teachers Where They Are

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Grand Oak Elementary School, Ridge Road Middle School, and Newell Elementary School are three designated Personalized Learning Schools in Charlotte-Mecklenburg Schools (CMS) in Charlotte, North Carolina. Each school is following its own path in their personalized learning (PL) journey—creating a unique vision for their school and finding success and hurdles along the way. While each school is unique, they share common goals in personalizing learning for their students. All three seek to meet students where they are, guide them towards fulfilling their potential, and impart a sense of ownership of learning and efficacy in the process.

During the course of site visits, it became readily apparent that each school had a structure that aligned with the CMS vision for PL: “Personalized Learning in Charlotte-Mecklenburg Schools aims to develop the whole child and empower them to take ownership of their learning by providing them with multiple pathways to demonstrate mastery learning in order to be successful and productive 21st century citizens in an ever-changing world.”1 This vision is grounded in the district’s four cornerstones of its PL initiative: 1) whole child, 2) student ownership, 3) mastery learning, and 4) paces, playlists, and pathways. While the importance of district leadership and support was mentioned repeatedly in each school and was evident throughout the visits, CMS also created an environment in which the structure and approach in each school resulted from a grassroots, bottom-up, distributed process of leadership guided and supported by the district.

The four cornerstones were evident in each of the three schools visited and were closely tied to the themes that stood out in the schools. It quickly became clear that the common themes, when taken together, provided a foundation from which personalized learning had the best chance to succeed in CMS schools. This paper will focus on four of these themes—the list is by no means exhaustive—and will offer examples of how these themes serve as the foundation for the success of personalized learning in Charlotte-Mecklenburg Schools.

1 http://pl.cmslearns.org/what-is-cms-personalized-learning/
Taking the First Step on the Personalized Learning Path

Every teacher approaches the shift to personalized learning in a unique way. Teachers need to see both themselves and their students differently. Veteran teachers have to let go of some of their tried and true classroom management ideas and explore new ways of doing things. New teachers might need to add fresh ideas and ways of thinking to what they’ve just studied in college. Taking on the challenge of shifting a classroom from a traditional classroom to a PL classroom takes some courage and the ability to see learning in a different way. It often requires a teacher to step outside of her comfort zone.

Christine Peachey, a second grade teacher at Grand Oak Elementary School, says her goal is to allow the children in her classroom to learn to fly. She felt she was “kicked out of the nest” as a teacher so she could “learn to fly” as a teacher. PL involves both teachers and students in the learning process—learning about themselves, learning about each other, learning about learning, and learning about the world.
Andrew, a sixth grade student at Ridge Road Middle School, has some advice for students new to the PL environment: “Be prepared to be engaged.”

**Getting Personalized Learning Off of the Ground**

In 2013, Charlotte-Mecklenburg Schools received a Next Generation Innovation grant from the Bill and Melinda Gates Foundation that enabled them to assess their needs and explore different paths that would move them toward personalized learning in their schools. After visiting many schools and interviewing teachers and principals involved in other PL initiatives, CMS understood that while many great models of PL have been adopted by other schools and districts, there was no one model they saw that fit the needs of their district. Recognizing that ownership and context were critical aspects of the work, CMS determined that the best avenue for success across diverse schools was in implementing a grassroots approach, grown organically and organized from the bottom-up.

CMS created an implementation, management and resource plan. Each of the district’s 168 schools \(^2\) was invited to demonstrate interest in personalized learning. Fifteen schools applied and all 15 of these schools (10 elementary schools, 4 middle schools, and 1 high school) made it through the multi-stage vetting process to qualify for the inaugural cohort. In July 2014, these 15 schools began their first year of personalized learning, with an additional 33 schools joining in the following two years (14 more will be added for the 2017-2018 school year). During the first year, CMS implemented a coaching model, with district level coaches taking the lead. By year three, leaders in the schools were taking charge, and CMS created an app to help in the coaching process of changing classroom practices. Professional learning opportunities were offered, and a PL Institute was created to aid in the on-boarding of each cohort of schools. Over 60 PD courses are currently offered. The district has begun micro-credentialing, including stackable badges as part of the professional development offered.\(^3\)

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\(^2\) As of 2014
\(^3\) pl.cmslearns.org
PL Case Study Schools
While CMS will have a total of 63 PL Schools by the 2017-2018 school year, the following three schools were part of this case study to identify some of the common themes and unique differences among the schools. Each of these schools has been a part of the PL Schools effort since the beginning: Grand Oak Elementary School, Newell Elementary School, and Ridge Road Middle School.

Grand Oak Elementary School

School Snapshot: Grand Oak Elementary
Principal Raymond Giovanelli

<table>
<thead>
<tr>
<th>Number of Students</th>
<th>600+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Started with PL</td>
<td>2014-2015</td>
</tr>
</tbody>
</table>
| Population         | White 77.4%  
|                    | Asian 7.3%   
|                    | Hispanic 6.8% 
|                    | African American 6.3% 
|                    | Two or More 1.6% 
|                    | Pacific Islander 0.3% 
|                    | American Indian 0.2% |
| Free/Reduced Lunch | 9%   |
Grand Oak began its PL journey in 2013 as part of the first cohort of the CMS Personalized Learning Initiative. Principal Ray Giovanelli chose to guide the entire school into PL at once, but encouraged teachers to choose where they felt most comfortable in starting their own PL journeys. Mr. Giovanelli continues to encourage teacher learning by providing reflection time on a monthly basis and by offering support in their day-to-day work. “Our teachers have really pushed the envelope,” he states with evident pride. “They’ve done so by taking ownership of their own learning and supporting their colleagues as they experience the transition to personalized learning together.” Jennifer Brinn points out that the school’s tagline, “Collaborate, Innovate, Achieve” isn’t just for the students, but includes all the stakeholders involved. “PL has opened the door for more reflective practice as educators.”

### Ridge Road Middle School

**School Snapshot: Ridge Road Middle School**  
*Principal Jametta Martin-Tanner*

<table>
<thead>
<tr>
<th><strong>Number of Students</strong></th>
<th>1300</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Started with PL</strong></td>
<td>2014-2015</td>
</tr>
</tbody>
</table>
| **Population**         | African American 65.6%  
                          | White 13.7%  
                          | Hispanic 12.5%  
                          | Asian 4.5%  
                          | Two or More 2.4%  
                          | American Indian 1.0%  
                          | Pacific Islander 0.2% |
| **Free/Reduced Lunch** | 51% |

Ridge Road Middle School completed its third year of personalized learning in 2017. When asked for a definition of PL, Tiffany Bartram, a 7th grade ELA teacher, said, “Nobody can answer that. It’s differentiation on steroids. It’s meeting the students where they are.” Not all teachers have embraced PL at Ridge Road, but according to Kendall Pauling, “more than half the teachers use it for at least some small things.” For Ms. Pauling, PL has made her planning more intentional. Data are used at the beginning, middle, and end of the learning, monitoring student progress. Adjustments are
made throughout, relooping if necessary, and students go at their own pace. A shift has occurred in the culture of the school as PL has taken root. Teachers have become more comfortable with the idea of failure as part of the growth process. Ms. Bartram observes, “We’re here to problem solve and learn from our mistakes. We use our tools to figure out what went wrong and what to try the next time. These are good lessons for the kids to learn.”

### Newell Elementary School

![Hallway Poster]

#### School Snapshot: Newell Elementary School

<table>
<thead>
<tr>
<th>Principal Lydia Ferguson</th>
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</thead>
<tbody>
<tr>
<td>Number of Students</td>
</tr>
<tr>
<td>Started with PL</td>
</tr>
</tbody>
</table>
| Population | Hispanic 50.2%  
African American 38.0%  
White 4.4%  
Two or More 3.1%  
Asian 2.7%  
American Indian 0.9%  
Pacific Islander 0.7% |
| Free/Reduced Lunch | 99% |

Newell Elementary began its transition to Personalized Learning as part of the first cohort of CMS PL schools in 2014. Natalie Matthews, a K/1 teacher and a 2016 Change Agent Fellow for CMS PL⁴, says the transition to PL from traditional teaching was scary at first, but once she learned more about it, “It made so much more sense. It’s what we should have been doing all along.” Kimberly Parker, a kindergarten teacher, was hesitant to jump into PL, and she relied heavily on her teammates for planning and taking the lead. She found starting small—picking one area to start with—is helpful when making the transition. There is a lot of upfront work to create materials, structures, and routines but after the initial work is complete, PL is a more efficient way to teach. Ms. Parker notes, “The only way for PL to be successful is for people to work together.”

### Themes across PL Schools

The case study schools and CMS agree that the transition to PL is a work in progress even after three years of implementation. Each school is at a different place in the transition, but each has also made significant progress. While each of these schools has unique contexts, students, communities, administrators, and teachers, several themes emerged across the schools through the voices of the administrators, teachers, and students. The themes relate closely to the CMS Cornerstones for PL, but they speak a bit more broadly to the essential conditions and supporting factors in all three of the schools that have served as catalysts for, enabled, or accelerated the transition to PL.

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⁴ PL Change Agents are strong PL educators provided with opportunities to further develop their leadership and professional expertise in order to promote Personalized Learning in the district.
1. Developing a **shared culture** focused on learning for all students in which what might be seen as a failure elsewhere is seen as part of the growth process.

2. **Professional learning** is imbedded, protected, valued, and seen as ongoing.

3. Teaching and learning are **student-centered and student-driven**.

4. Focus on the **whole child and social and emotional learning (SEL)** in which achievement is one of several data points.

### CULTURE: ENCOURAGING GROWTH AND RISK-TAKING

The leadership of **Newell Elementary School** changed during the three years of their PL involvement, with a new principal coming on board after their shift to PL had begun. Rather than slowing down progress, the new principal took this transition as an opportunity. Teacher Natalie Matthews said that the current administration was very supportive of personalized learning and was willing to learn about PL from the teachers. The principal set the inclusive tone for the school and made it clear that the successes and failures of individual teachers were also the successes and failures of the collective. The administrative team modeled the growth mindset, acknowledging their own failures and successes, and Ms. Matthews understood that making strides in personalizing the learning for all students was the goal and that failures along the way were to be expected and learned from.

**Grand Oak Elementary School** has created a positive school culture that is evident everywhere you look. Entering the building, there is a strong sense of inclusion and belonging. Purposeful work is being done and the learning space is designed to facilitate that work.

The message the students get is clear and consistent: they are a valued part of the learning process and they have a voice. Ray Giovanelli, Grand Oaks’ principal, offers to step in and teach in the classrooms, providing “Innovate Time, so teachers can step out and engage in learning of their own. Doing this not only supports the teacher’s learning and professional development, but it supports his own learning. He engages directly with the students in each classroom, learning more about them and strengthening their community. He models the kind of active learner he wants his teachers and students to be. Lynn Farmer, a second grade teacher, felt comfortable playing with the structure of PL in her classroom. She had all the students working on pathways and found that they all needed help at the same time, which was overwhelming. Instead of giving up, Ms. Farmer restructured her class and found paths that worked for her and her students.

Kendall Pauling says the school culture at **Ridge Road Middle School** has shifted and the majority of teachers have engaged. The transition to Personalized Learning has created a sense of order and a way to plan more effectively. This has made her a better teacher because she knows her students better. She’s adopted a “hands off” approach toward her students that allows her to ask the question, “How can I still keep my hands involved?” She is now able to have more purposeful interactions with her students. Students discussed the engagement difference between teachers who are focused on PL and those who are more teacher-directed. Students notice when teachers are not engaging with them.

The culture shift at Ridge Road is strong enough that teaching in this style has become expected, not only by the students and by other teachers as well. Teaching in a similar way is expected, and PL has
created a lot more uniformity in things like classroom procedures and classroom management and the way teachers handle students. Facilitators and administrators work hard to differentiate professional learning for the teachers. When asked about doing school visits to learn, Ms. Pauling said “We are the place to visit for other people.” The teachers at Ridge Road learn from and challenge each other and enjoy sharing what they do with visitors. There is a strong sense of ownership of their own teaching.

**PROFESSIONAL LEARNING AND UNLEARNING**

In each of the case study schools, professional learning is protected, valued, and seen as ongoing. A transition to PL asks a lot of a school’s teachers and support staff. It asks them to unlearn years—and in some cases, decades—of ingrained instructional strategies and mindsets. For professionals who have been confident and comfortable guiding their class through a curriculum in unison, the shift to paces, playlists and pathways can be jarring at first. Teachers are asked to relinquish control, to take on more of a facilitator’s role than that of a repository of knowledge. This profound shift, both instructionally and psychologically, requires extensive and meaningful opportunities for professional learning. In its transition to PL, CMS made sure that these types of development opportunities were available.

The PL culture supports active, varied, and meaningful professional learning. Teachers are committed to working and collaborating with their colleagues within their school, but are also a part of the wider PL community of CMS schools as well. When the PL initiative was launched as part of CMS’ Strategic Plan, the district tapped Jill Thompson to design and lead the pedagogical shift. The initiative began in the Technology and Transformation division, led by Chief Officer Dr. Valerie Truesdale. The PL initiative was championed by Superintendent Ann Clark, whose support over the years enabled the initiative to grow. When the district began its PL journey, Thompson and her CMS team traveled to other schools around the country to see what was already being done. While they liked what they saw, they quickly realized that what was working in other places was not necessarily going to work in their district. They took small action steps, constantly reflecting on their own learning and making incremental changes along the way. The team modeled this process for the teachers and principals in the district: take a small step, reflect on how it went, make modifications based on this reflection. Ms. Thompson and her team created the **CMS Playbook**, a just-in-time resource for teachers and support staff to help anchor the transition. This **CMS Playbook** is populated with the products of district teachers’ own learning and aligns directly to the district’s four cornerstones. The **Playbook** is updated on a regular basis and is available to the general public.

CMS also seeks to learn from others outside of the district and state that are striving for personalized learning. For example, CMS is an active member of the Digital Promise League of Innovative Schools. The district regularly participates in the League’s PL study groups, sharing best practices and learning with colleagues across the nation. CMS also partners with the National Council of Learning Differences, KnowledgeWorks, and AASA, as well as other organizations to expand learning opportunities for the adults and students in the system. For example, several CMS facilitators attended the Friday Institute for Educational Innovation’s **Leadership in Blended and Digital Learning** training, in which facilitators utilized content and instructional strategies developed by the Friday Institute to lead professional learning for CMS principals.

5  [http://pl.cmslearns.org/playbook/](http://pl.cmslearns.org/playbook/)
CMS also created their own version of modules on Learning Differences from the Friday Institute’s Learning Differences Massive Open Online Course for Educators and piloted the Learning Differences course for students. CMS continues to learn from districts and schools across the country who are making strides in personalized learning. CMS also hosts tours twice a year for other districts and school teams to see CMS’s PL in action.

Coaching has been an integral part of the PL Initiative and was created explicitly with sustainability in mind. Within three years of coming onboard, PL schools are required to be autonomous in their PL work. In practice, this meant that schools had to build their internal capacity to support their teachers on a daily basis in all aspects of personalized learning. This is no small endeavor. To support each school’s designated PL “lead teacher,” the district also created a custom app to help guide the coaching process. The app was designed to streamline the data collection process during the coaching visit and the debrief. It has improved the efficiency of the coaching process in providing feedback to teachers. Thompson and her team are always trying to model for their schools, and they encourage school leaders to customize all of the resources in order to suit their unique contexts.

These teacher-leaders have been recognized for being lead learners and promoters of PL both in their schools and in the district as a whole. Ms. Matthews was part of the original cohort of teachers that began their PL journey and has presented at the district’s annual PL Institute. She has watched her students take pride in and ownership of their own learning, as she has watched them discover the power they gain in their own learning by tracking their own data. Her learning journey has mirrored that of her students, where she has gained pride and ownership of her own work in the classroom.

Across the PL schools, teachers share that they are able to create hybrid paths for their professional trajectory, expanding their roles to include coaching and leading PL. Teachers feel empowered and engaged in their own learning, and that has had a positive impact on the classroom. Leslie Olmstead, of Grand Oaks Elementary School, points out that “PD opportunities are great.” She and her colleagues have been encouraged to go visit other schools and to bring back information and ideas to try. Ms. Olmstead says, “Our biggest support, and why PL is working, is each other.”

CMS has also begun a system of micro-credentialing, which offers teachers and support staff a way to demonstrate competency and mastery learning in a variety of different areas around personalized learning. The district’s micro-credentialing initiative includes stackable badges that are focused on its four cornerstones. In order to earn a micro-credential, teachers and support staff must demonstrate that they know or are able to do something. They do not receive credit for simply attending a professional learning experience. These demonstrations are artifact-driven, with earners providing evidence that they’ve used these skills in context with students. The skills teachers master are self-directed and intended to have an immediate practical impact on the classroom. Teachers work on micro-credentials on their own time frame and schedule, mirroring the paces, playlists, and pathways cornerstone that guides the PL initiative for students and ensuring that their learning is also personalized.
While professional learning has been central to the progress made in the transition to personalized learning, not all teachers are ready to jump in when the school comes on-board. One of the challenges administrators and CMS have found in the arena of professional learning has been convincing teachers that changing to a PL classroom environment and method of instruction is worth the time and effort involved. Teachers are busy and the thought of taking on a new way of structuring a classroom can be overwhelming, especially for those who are accustomed to teaching in a more traditional format. However, the initial CMS quantitative evaluation demonstrates that math growth in PL schools is, on average, higher than in comparison schools\(^6\), which helps make the case to a doubting teacher. Many of the PL teachers and administrators in the case study schools have become the biggest advocates for PL. They acknowledge the challenge and the hard work required, but speak openly about why they believe PL is critical and making a difference for students.

### STUDENT-CENTERED AND STUDENT-DRIVEN

Each of the case study schools strives to ensure that teaching and learning are student-centered and student-driven. One of the most meaningful shifts in a transition to PL is in moving from teacher-centered to student-driven instruction. This shift requires a significant investment in professional learning to help teachers see themselves more in the role of a facilitator helping guide each student to meet his or her learning needs rather than a presenter who is providing information to his or her students and progressing through the same content as a group. While it might seem that a facilitator’s role is less challenging, the reality is the opposite. CMS’ ultimate goal is to reach a student-driven learning environment, with student-centeredness being an intermediate step along the way. This shift is intended to happen gradually, with small steps and continuous reflection along the way. Tiffany Bartram, a 7th grade ELA teacher at Ridge Road in her third year of PL teaching, says the PL model has brought her closer to her students because students feel they have more ownership and choice. “Kids love what they’re doing. Their engagement comes because they want to do it.” It’s also taken the pressure off teachers to be the one who answers all the questions, according to Kendall Pauling. “The challenge is on the students to figure out the answers.” PL challenges students to both find answers and also to understand the process of finding these answers. The PL environment has given both students and teachers alike the chance to challenge themselves. Ms. Bartram says, “As teachers, we’re here to problem solve and to learn from our mistakes. We use our tools and figure things out. This is a good lesson for the kids to learn.” Students at Ridge Road have a voice in what and how they learn, but they also have choices in the products they create to demonstrate mastery. Ms. Bartram described a Garden Project her students were involved in. They did research, created a Garden Club, and won a grant. Their ideas took off and blossomed. And she added, “the students aren’t done with it. It’s still evolving.”

Middle school students at Ridge Road are involved in tracking their own data and they use this data to help inform their choices about what to pursue next. They speak with confidence and knowledge about their data, recognizing that it provides them with support and guidance rather than something that may be punitive.

Students at Ridge Road are enthusiastic about their involvement in PL classrooms. They feel engaged and challenged as well as empowered to understand themselves and the way they learn. Andrew, a 6th grade student, explains that he’s gotten to know how he learns best, and that knowledge about his own learning impacts the choices he makes in the classroom. Kaelin, an eighth grader, says one of the reasons PL is so successful is that the teachers are connecting with the students on a personal

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level. “You want to work harder for a teacher who is interested in you.” The students are also encouraged to collaborate with their classmates and have learned to rely on them. J.B., a sixth grade student, has learned to trust and listen to his classmates. “The different perspectives can be helpful. The old way of learning was boring. Now I’m excited to learn.”

One challenge the eighth grade students at Ridge Road face is the possibility of a high school experience devoid of PL opportunities. The students feel ready to meet the challenges they might face in more traditional classrooms. Peyton says, “I will still use the strategies I’ve learned even if the teachers go back to teaching in traditional ways.” Kaelin adds, “Because of my PL experience, I know what my strengths and weaknesses are, and I’ve figured out the best ways to expand on them. I’m going to keep doing that no matter what.”

At Newell Elementary school, the kindergarten teachers have embraced the idea of student driven learning. One kindergarten teacher, Kimberly Parker, says, “Once I taught them the procedures and how to do things, they took ownership. You have to teach kids how to make a choice for their learning.” Breaking down the expectations and teaching students how to drive their own learning, track their own data, and make their own choices means giving students control. And when they have control, students “can do more than we give them credit for,” says Natalie Matthews, a K/1 teacher. She advocates controlling the release of control in the classroom with the younger students. “Take baby steps,” she says. “Make things accessible.” Showing them how to make choices based on their strengths and their data makes learning seem natural.

Teachers beginning their PL journeys follow a similar path toward driving their own learning. Kimberly Parker advises teachers to, “Start small. Pick one area you want to start with and build it up.” She found that there was a lot more “up front work” in creating a PL classroom, but after the initial push, the classroom flowed because the “structures, routines and materials were already in place.” She cautions teachers to heed the advice teachers often give students. “Don’t worry about what the others are doing.” Just as every student’s learning journey is unique, every teacher’s journey is based on their individual strengths and weaknesses. Teachers are encouraged to collaborate, communicate, create, think critically and show an entrepreneurial spirit – the 4 Cs plus an E – just as students are.
A STUDENT IS MORE THAN ACADEMICS

Each school emphasizes the **whole child and social and emotional learning (SEL)** in which achievement is one of several data points. The whole child approach to education ensures that each child is healthy, safe, engaged, supported, and challenged. Students are encouraged to support each other and build positive relationships, demonstrating character of which they can be proud. Related to the whole child approach, social and emotional learning (SEL) is “the process through which children and adults acquire and effectively apply the knowledge, attitudes, and skills necessary to understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions” (CASEL).

CMS teachers and students are adjusting to the instructional shift in the classrooms. The students’ role changes from being consumers of knowledge to driving their own learning, which helps to build habits of mind. Adapted from Art Costa and Bena Kallick’s *Habits of Mind*, educators from the first cohort of schools created ten Personalized Learning Learner Profiles that are now embraced daily in Personalized Learning classrooms. They serve as a common language from K-12.

A PL environment supports going beyond academics and intentionally addressing the whole child and SEL by encouraging student ownership not only of their learning, but of their relationships with each other, their teachers and administrators, and their physical environment. PL encourages students to be bigger risk takers because they want to try new things. PL encourages students to take pride not only in their own work, but the work of others and their environment. Michelle, a third grade student at Newell Elementary, thinks it’s exciting to come to school every day. One of the highlights for her is the opportunity she has to help her friends by teaching them things she’s already learned. “It’s awesome to know your friends learned something from you. I love to learn new things from my classmates.”
Personalized Learning: Learner Profile

Personalized Learning scholars strive to be...

**Creative & Critical Thinkers:** I think before I act. I routinely examine problems in new ways and seek to find creative solutions. My imagination allows me to express myself and develop new ideas. I use the design process to help guide my thinking.

**Effective Communicators:** I clearly convey my thoughts, questions, solutions, and ideas in multiple ways, including verbally, written, and digitally.

**Collaborators:** I effectively work with others to reach our goals—combining our talents, expertise, and smarts. I actively listen to others’ ideas and contribute my own, which allows me to function as part of a team.

**Entrepreneurs:** I think differently and am resilient in my quest to be innovative. I persevere through difficult tasks. I identify needs or challenges and proactively find solutions to address those needs.

**Flexible & Adaptable:** I can adapt to change. I am able to work effectively in a variety of environments. I value other people’s strengths and learn from them.

**Receptive & Reflective to Feedback:** I value feedback to help myself improve and further develop my skills to achieve personal growth. Reflecting critically about past experiences helps me to inform my future progress. I am aware of my own strategies, feelings, actions and their effects on others.

**Leaders:** I do the right thing, even when no one is looking. I empower and support those around me. I am constantly finding ways to improve myself. I maintain a positive attitude and a sense of humor.

**Open-Minded:** I am willing to consider and listen to new ideas and understand my first assumptions might not be accurate. I am respectful, objective and am able to see things from multiple perspectives.

**Self-Directed Learners:** I manage my goals and time, am able to work independently, and take initiative to advance my skill levels. I am committed to learning as a lifelong process. I take pride in my work.

**Academic Risk Takers:** I am driven, determined, and willingly accept new and difficult challenges. I am resourceful and view mistakes and failures as opportunities to learn and grow.
One of the ways the whole child is focused on and developed in the PL schools is through morning meetings. Natalie Matthews, a K/1 teacher at Newell Elementary, has a morning meeting in her classroom every day for thirty minutes. Morning meetings incorporate learner profiles and reflections on their profiles. Students gain confidence when learning is broken down into standards. Students learn that they are strong at certain things, but also have areas on which they need to work. They better understand their own strengths and weaknesses and they understand that mastering information for individual standards is attainable and doable. Anali, a student in Ms. Matthew’s kindergarten classroom, talks about how in their classroom Monday morning meetings, the students are encouraged to talk about their weekend activities. This brings the outside activities into the classroom and allows the students and teachers to know more about each other, building trust and community.

Amy Cichowski, and other teachers at Ridge Road Middle School, address the whole child by getting to know the students and learning the ways the students are most comfortable learning at the beginning of the school year. Letting students choose the way they learn gives them more confidence and creates a “whole new level of engagement.” Ms. Cichowski cites an example of a student she has in an inclusion class who is a struggling reader. His level of engagement soared when she gave him a choice of novels as well as a choice of assignments. He and his learning partner are now on task, managing their time effectively, working together, and making responsible decisions.

High achieving students at Ridge Road also report increases in the five core competencies—self awareness, self management, responsible decision making, relationship skills, and social awareness (CASEL). Kaelin, an 8th grader at Ridge Road, points out that student choice and having students working on different levels in a classroom frees students and teachers, forcing students to make their own decisions about how hard to work and how to manage their time. The ability to make these choices has consequences and students throughout middle school learn to make better choices and decisions. Students become more self aware and independent as they work through understanding what they know and what they don’t know. Teachers don’t tell students how to learn something. Students learn to test their own knowledge and create pathways for their own learning. While healthy competition about academic performance still exists in PL classrooms, the format creates more opportunities for students to collaborate and share knowledge and expertise.
The majority of her fellow students in the sixth grade at Ridge Road Middle School, says Emma, have been in the same classes since third grade and they know each other well. They collaborate well because they know each other’s strengths and weaknesses. They are also competitive with each other, which often drives them to work harder than any pressure a teacher or a grade might create. When asked to give advice to new students coming into a PL environment, Emma said, “Expect the unexpected.” Kaelin added, “Prepare to be engaged.” Because students and teachers are involved and constantly challenging themselves to learn and adapt, the learning community of Ridge Road is constantly developing.

Kaelin advises teachers to use a PL approach to help them connect with students on a personal level. “Get to know your students.” The more teachers and students get to know each other, the more they trust. That trust enables learning to flourish.

**FUTURE DIRECTIONS & RECOMMENDATIONS**

*Key Themes and CMS Cornerstones*
The themes that emerged throughout the three schools and the input from the administrators, coaches, teachers, and students align with and show a consistency in approach to CMS’s *four cornerstones* of PL: 1) whole child, 2) student ownership, 3) mastery learning, and 4) paces, playlists, and pathways. While student-centered and student-driven teaching and learning and the focus on the whole child and SEL are almost directly aligned or encompass several of the cornerstones, the themes around culture and professional learning focus much more heavily on the *conditions* that are essential for transitioning to PL for every student.

Each school had not only paid attention to the need for a culture in which students are truly at the center of the planning and one in which all stakeholders feel comfortable taking risks and trying new things, but they often led with steps to lay that foundation almost immediately. The focus on professional learning and the need for all educators to have a personalized path to beginning, learning, implementing, sustaining, and reflecting on their own efforts were consistent across all three schools even though each utilized different approaches. The leadership and supports from the CMS PL team were evident in every school and clearly contributed to the common language and understanding of what was possible with PL.

The overlap and distinctions in the respective implementations are very important to consider as new schools begin to move toward this transition to PL. Schools must develop a shared vision of what is possible with personalized teaching and learning, and developing that vision ideally occurs with choice and buy-in from the beginning. CMS and the school leaders were willing to invest the time, effort, and supports into working with the administrators, coaches, and teachers to envision and improve their culture and focus on professional learning. This foundation is critical to the ongoing implementation, to handling the highs and lows, and to truly changing how teaching and learning happens in the school.

The themes that emerged in this case study demonstrate many positive aspects for students in the PL Schools. CMS also conducted a quantitative evaluation of the work across many of the PL schools. “The results suggest that Personalized Learning students, on average, exceeded growth expectations and were largely engaged in school.” (CMS, July 2016). The study utilized comparison and treatment groups, and the themes that emerged in the case study schools are consistent with the findings.
Recommendations for Schools Transitioning or Wanting to Transition to PL

The case study schools also employed the growth mindset in which they are always learning and improving. Based upon the Personalized Learning work in CMS and the specific lessons and observations from the three case study schools, several recommendations emerge that can support other districts and schools in the transition to PL:

1. **Provide purposeful leadership and support from the district level.**

While the opportunity for each school to develop and implement their own approach and path in the transition to PL was critical for the progress made thus far, the importance of the district leadership and vision and support through professional learning, toolkits, and direct coaching was hard to separate from the grassroots efforts in the school. The connection with the district coaches was seamless and part of their ongoing, job-embedded professional learning even though each person on the PL team works across many schools. Schools knew that the district supported where they were headed with PL, and this allowed them to take steps and move ahead for students through PL.

2. **Consider and respect the complexity of PL.**

The transition to PL is challenging and complex work which affects almost every aspect of the school. These schools focused heavily on ensuring that the vision was clear and that everyone involved in the school understood the emphasis on PL. Every person in the school, from parent, administrative staff, teachers, students, and community members, understood that the students were at the center and that this work was underway. Instruction changed well beyond the transition from teacher-directed to student-centered. The use of time and space changed in each school, homework and assessments took on a different form, and the way that students talk about their own learning and data shifted and deepened. PL cannot be incremental. It must be comprehensive to make this shift in a meaningful way, and it will take multiple years.

3. **Invest in human capacity.**

PL is about PEOPLE and human capacity. This includes the knowledge, skills, and ownership of the educators, students, and administrators; the understanding and commitment of parents and community members; and the intense support from the district in terms of professional learning, capacity building, and opportunity for autonomy at the school level. The importance of the investments made at the district level and in each school in human capacity emerged in almost every interview, focus group, and classroom visit. Even in the important areas of curriculum and content around the pathway development, the importance of the teachers’ learning and application of that learning were at the forefront.

4. **Lead with culture, trust, and agency.**

At the core, the adults and students in these schools demonstrated and talked openly about trust and agency in their work. Students, teachers, and administrators understand that they will sometimes make mistakes and need to reflect, change course, and try again. Administrators discussed the importance of making this transition their own with critical supports, guidance and encouragement from CMS, while also empowering educators to do the same for their classrooms with guidance and supports. As administrators and educators modeled the growth mindset and importance of agency, students responded and talked in a sophisticated way about their own learning and choices. These common themes emerged despite the unique approaches and diverse contexts of these schools.
Learning is at the core.
While much of the work hinges on human capacity and building a culture of trust and agency, the common vision and focus of the work always come back to student learning. Ensuring that students are mastering the standards and have what they need to be prepared for college and career is goal one in CMS. The theme of equity to meet the diverse needs of each student is prevalent throughout the design and implementation of personalized learning experiences. Students at these schools are able to talk about their learning, as early as kindergarten, and understand where they are and where they are going on their pathways. The initial CMS quantitative results support this focus, but this is also evident in each school.

PL: A Work in Progress
With the positive movement across the three case study schools, each would also agree that the transition to PL is a work in progress. Each administrator and teacher was quick to point out what else is possible, what else they want to try and how they want to grow the work. This mindset among the adults in the building models how PL strives to have students approach their learning and also provides a critical foundation for CMS in continuing to grow this work.

Students and teachers who have made the transition to personalized learning all say that they wouldn’t want to return to a traditional classroom model of learning. Teachers find they get to know their students better and get to work in collaboration with other teachers and administrators in ways that are challenging and encouraging of the own learning. Students and teachers feel more engaged and more confident in their own learning. They find ways to soar with learning. And the benefit of personalized learning, according to Emma of Ridge Road Middle School, is that it “lets you do you.”

Resources
CMS PL website: http://pl.cmslearns.org
Podcast Archives: http://pl.cmslearns.org/podcast (By teachers, for teachers. Released each Monday.)
Teacher Voice Video: https://www.youtube.com/watch?v=fI6Uvmnnzyo
Student Voice Video: https://youtu.be/EhYd24N4U_E
PL in CMS Video: https://youtu.be/_OFBsLsP0QU
Playbook with resources: http://pl.cmslearns.org/playbook
Blog post - Natalie Matthews (Change Agent): KnowledgeWorks: Meeting Students Where They Are (http://knowledgeworks.org/worldoflearning/2016/07/meeting-students-where-they-are/)
CMS PL Facebook page: https://goo.gl/gjg23M
Student Ownership podcast: http://pl.cmslearns.org/podcast/students-own-the-building/
www.digitalpromise.org