



Look Both Ways

A framework to help education leaders navigate through competing approaches to system-wide change.



Table of Contents

03	About this Resource
04	Methodology
05	Our Sample Systems
07	Seven Key Questions
10	Question 1: How do we decide what the district should hold tight vs. loose?
15	Question 2: How fast should we be moving from pilot to scale? What will help us best achieve sustainability?
20	Question 3: How do we decide where to pilot and how to allocate resources to schools?
25	Question 4: How should we develop our talent and resource pipeline?
30	Question 5: How flexible should our district strategy be over time?
35	Question 6: Should we scale a comprehensive model throughout our system or provide access to a series of independent, modular resources or tools?
40	Question 7: How might practitioners best learn from one another? What should we be cataloging and sharing throughout the district?
46	Survey Data
59	Reflection Guide 1: Laying the Foundation
60	Reflection Guide 2: Charting Your Path
62	About the Authors
62	Contact Info and Thank Yous

About This Resource

Networks of schools across the country are increasingly using more personalized and blended learning strategies to create equitable access to high-quality instruction, increase student engagement and agency, and meet individual student needs. At The Learning Accelerator (TLA), we are interested in identifying and helping practitioners overcome the important challenges that underlie implementation as leaders seek to learn and scale new approaches. **What are the decisions that leadership teams have struggled with the most or have named as the most critical to success?**

While there are many case studies now available that describe strategies in action, these stories often focus mostly on what was done and how, rather than the rationale behind them. Over the last year, we've been tackling this gap. Our aim is to open a window for those leading initiatives to unpack the logic behind different decisions in order to develop a more coherent and successful approach for implementation and improvement.

Through research with a hundred leaders, we've identified seven key decision areas that system teams face. This tool explicitly explores each decision area and provides examples of different paths districts and CMOs (charter management organizations) have taken. These examples should not be read as holistic descriptions of each system's model, but rather small, illustrative examples of specific choices leaders have made to accomplish particular goals.

Leaders using this tool should also keep in mind the following:

- These decisions are foundational to more technical action areas, helping to create coherence across teaching and learning practices, system-level conditions that support scale, approaches to building human capacity, and measurement to inform and improve. Our team has captured, codified, and made openly available many strategy resources in these areas on our [Blended and Personalized Learning At Work site](#).

- Community engagement is critical at all stages of innovation, implementation, and improvement. Many of the leaders we interviewed highlighted the importance of designing implementation strategies WITH and not for the students and communities they served.
- All decisions should put equity of student experience and outcomes at the forefront. **While we focus on the more direct implications of different leadership choices, we do so with the assumption that serving the needs of all students is a goal that underlies all the others.**

We hope that this research, grounded in the voices, insights, and strategies of leaders from across the country offers you constructive guidance as you approach your own scaling initiatives.



Beth Rabbitt
CEO, The Learning Accelerator



Ellie Avishai
Partner, The Learning Accelerator



Methodology

This project started as a series of exploratory conversations with leaders of blended and personalized learning from across the country. The TLA team asked 30 district, CMO, and non-profit leaders, who were at different points along their scaling journeys, to tell us about the most important decisions they had to make when taking blended learning to scale.

Out of those conversations emerged a set of challenges that kept coming up, regardless of demographics, geography, or size of the system. Identifying these themes led us to widen our sample and gather some preliminary quantitative data from the field to see if these challenges resonated with other leaders and, if so, what decisions they were making. Our survey returned data from 100 leaders across the country, from more than 60 systems. The geographic spread of the survey respondents is mapped out, below.



Our Sample Systems

Based on findings, the team worked with a smaller sample of public, private, and charter systems to more deeply understand and capture their decisions and strategies. These systems, and the leaders who shared with us, are shown below.

Alliance for Catholic Education (ACE)

Elizabeth Anthony
Blended Learning Coordinator



Chicago Public Schools, IL

Kevin Connors
Director of Blended Learning



Middletown School District, NY

Ken Eastwood
Former Superintendent



Dallas Independent School District, TX

Kristen Watkins
Director of Personalized Learning



Oakland Unified School District, CA

Kyleigh Nevis
Instructional Technology Coordinator



Leadership Public Schools, CA

Michael Fauteux
Director of Innovation



Somerville Public Schools, MA

Jason Behrens
Innovation Project Specialist



District of Columbia Public Schools, DC

John Rice
Former Director of Education Technology



Greeley-Evans School District, CO

Deagan Andrews
Director of Instructional Technology



Los Angeles Unified School District, CA

Stepan Mekhitarian
Blended Learning Coordinator (currently
Coordinator, Accountability and Assessment at Glendale Unified School District)



Baltimore County School District, MD

Dr. Lisa Williams
Executive Director of the Office of Equity
and Cultural Proficiency



Gwinnett County Public Schools, GA

Tricia Kennedy
Executive Director for eClass
Transformation



Mesa Valley 51 School District, CO

Rebecca Midles
Director of Teaching and Learning

Ken Haptonstall
Superintendent



Henry County Public Schools, GA

Aaryn Schmuhl
Chief Leadership Officer

Karen Perry
Personalized Learning Coordinator



Fulton County School District, GA

Heather Van Looy
Program Specialist, Instructional Technology

Kimberly Richards
Coordinator, Research and Program Evaluation





Seven Key Questions

No system's context is exactly the same as another's, and therefore pathways to system change cannot completely replicate each other. While case studies on system-wide implementation offer inspiration and ideas, they can be difficult to apply in new contexts.

Regardless of context, however, all leaders interested in scaling new approaches face choices about how to lead system change in a way that maximizes benefits to students. In interviews across the country, we found that certain decisions kept surfacing as critical to success, many of which contained competing priorities - forces pulling in different directions. **Rather than choose one priority and ignore the other, leaders explain, the key is to figure out how to manage both in a way that best fits your context.** These are seven key questions that underlie implementation:

These questions are not either-or propositions. We have yet to meet a leadership team who has, for example, chosen to decentralize every aspect of a scaling process. Instead, we have cataloged a variety of solutions that draw from both sides of the ledger. We have paired up these broader decision frames with specific examples from systems across the country to see the various forms they can take.

- Q1** How do we decide what the district should hold tight vs. loose?
(Centralized vs. Decentralized Implementation)
- Q2** How fast should we be moving from pilot to scale? How can we achieve sustainability?
("Fast and Furious" vs. "Slow and Steady")
- Q3** How do we decide where to pilot and how to allocate resources to schools?
(Prioritize Need vs. Prioritize Readiness)
- Q4** How should we develop our talent and resource pipeline?
(Build Internally vs. Buy Externally)
- Q5** How flexible should our district strategy be over time?
(Fixed Strategy vs. Adapt with Experience)
- Q6** Should we scale a comprehensive model throughout our system or provide access to a series of independent, modular resources or tools?
("Prix Fixe" vs. "A la Carte")
- Q7** How might practitioners best learn from one another? What should we be cataloging and sharing throughout the district?
(Share Best Practices vs. Share Process/Failures)

Consider the Following as You Read...

While each of the seven decision areas can be considered on its own, use the following frames to guide your thinking as you read through them.

Chart your own way through.

While there are dozens of strategies we can learn from other systems, there is no single pathway to scaling blended and personalized learning. In our surveys, none of the seven challenges was cited as “top-priority” by all respondents. Yet each area was named as a top-priority by at least one respondent. This means that what is considered “high priority” for one system may not be so for another. Every system and school context is different.

Consider multiple possibilities.

Often we grow an infrastructure (e.g., investments in training, technology, resources, etc.) around our choices that can make it difficult to change direction, even when we should. While time pressure often leads us to make decisions quickly and then run with them, it can be productive to take even a small amount of time to consider the value of different options (especially if you deliberately ask for the perspective of diverse stakeholders in your system). Engaging in even a brief thought exercise about other options can help you make more robust decisions before locking into a strategy.

Look for areas of intersection.

Each of the seven questions we explored has ties with the others. Instead of thinking about these individually, define your “north star” (the goal you are driving to accomplish), and then look at how these decisions each contribute to achieving that goal.

Avoid entrenchment.

As our team looked across all areas, we did not find a single leader who supported (or implemented) a scale strategy that fell exclusively on one side of the spectrum (e.g., “Everything we do will be fast and furious!”). The question to ask is not “Which side are we on?” but rather, “How will we navigate a path that optimizes our goals?”

Share more failures.

While, as educators and leaders, we consistently call for students to be open about their failures, we struggle to do it ourselves. Sharing both things that did not work and also the process we took to achieve our successes and failures helps others (and us) learn more quickly. It is worth considering how, as a sector, we can do more to share our leadership failures for the purpose of raising the bar for everyone.

...and think about applying them to your context.

Many of our examples represent different, even seemingly contradictory, approaches to implementation — mirroring the different contexts and goals being served. This is not an implementation guide, nor is it a manual of strategies to replicate. Instead, this is a thinking and planning tool intended to help leaders:

- Get broad insight into the kinds of decisions other leaders have named as critical to success
- Understand different motivations that might be underlying a conflict between different stakeholder groups
- Provide examples of district-level implementation and scaling strategies
- Offer starting points to push thought to action

Our goal is to help leaders and communities make explicit choices often pursued implicitly or habitually. To this end, we have also provided [two reflection tools](#) for working through these decisions in readers’ own contexts, and reflection questions in each section to jump start discussions.



How do we decide what the district should hold tight vs. loose?

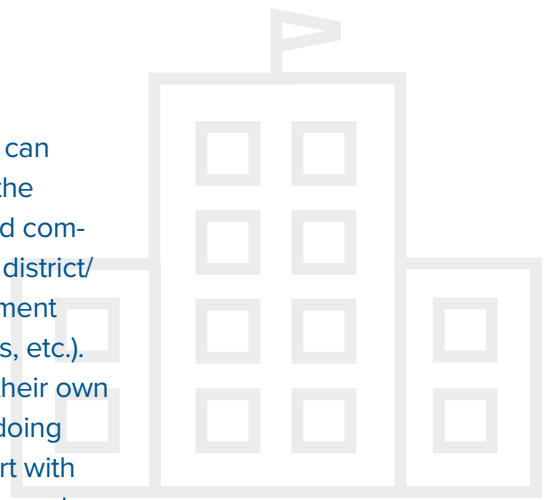
Centralized vs. Decentralized Implementation

One of the most common challenges the leaders we spoke with faced was striking the right balance between managing blended and personalized learning implementation through the central office and giving schools enough autonomy to manage their own processes. District/CMO leaders charged with system-wide transformation understood that a fully centralized model would limit teacher and school leader engagement, while fully decentralizing would create unnecessary redundancies and inefficiencies.



Why Centralize?

In its ideal form, centralizing implementation through the central office can enable faster and clearer alignment around the purpose and goals of the reform throughout the system. It can also make it easier to develop and communicate a unified definition of blended or personalized learning. The district/CMO benefits from efficiencies of scale (e.g., for professional development and coaching systems, technology procurement, or evaluation systems, etc.). School leaders do not need to reinvent the wheel for every aspect of their own implementation process and benefit from greater predictability when doing their own planning. Teachers can form communities and garner support with peers throughout the system who are going through the same learning cycles.



“The vision has to be your North Star.”

Rebecca Midles

System-Wide Definition of Blended or Personalized Learning

When asked about the most critical piece of their implementation process, many leaders talked about the importance of having a clear, centralized vision for reform that includes the desired outcomes the district is seeking. For a number of districts, even those with largely decentralized strategies (including, for example, [Henry County Schools, GA](#) and [Chicago Public Schools, IL](#)), this has meant creating a coherent, district-wide definition of blended or personalized learning to ground and align implementation efforts. “Competencies aren’t the vision. Personalization isn’t the vision,” says [Mesa Valley 51, CO](#) leader Rebecca Midles. “The vision has to be your north star — the WHY. Otherwise you end up talking at people about what they should do next instead of working with people about what you’ve designed together.”

“If you start at the classroom level, the system can’t see itself.”

Lisa Williams

Collecting Data to Attain a System-Level View

Dr. Lisa Williams, the executive director of the Office of Equity and Cultural Proficiency in [Baltimore County Public Schools](#), explains that meaningful culture change requires a system-level view. “Leaders have to create the conditions where equity is possible and where students (and teachers) are not being problematized.” Under her leadership, Baltimore County has taken a centralized approach to collecting data that could be disaggregated by gender, race, SEL, ELL, and other identity markers. This has allowed district leaders to learn about and address the needs of students who were not being well served by (then) current district practices. “When you take a system approach, you can break the data down and see different things. We saw, for example, that middle-class black students were underperforming poorer white students.” This knowledge helped guide the district’s efforts to personalize learning for their students and address the inequities they saw.

“We didn’t want the instructional component to fall to the side.”

Kyleigh Nevis

Cross-Housing Blended and Personalized Learning under Teaching and Learning and Technology

In [Oakland Unified School District, CA](#), Instructional Technology Coordinator Kyleigh Nevis operates under both the district’s Department of Teaching and Learning and Technology Services and is responsible for building the capacity of its leaders. “It was important for me to be situated under teaching and learning (rather than only technology), so that people didn’t see me as just a tech person.” By creating a centralized role clearly linked to instructional practice, Oakland Unified is signaling that personalizing learning is not a peripheral classroom tool, but a fundamental approach to instruction.

“We realized that in order to reach our goals, we would have to develop a robust technology infrastructure.”

Tricia Kennedy

Centralizing Information Management in the District

[Gwinnett County Schools, GA](#), a large district of approximately 180K students just outside of Atlanta, created a centralized information management system called [eCLASS](#) as a “one-stop technology shop” for students and teachers. eCLASS contains internally-developed systems as well as platforms (like an LMS) that were procured externally. While eCLASS relies on externally- developed platforms, it was an internally-constructed idea within the district to merge teacher-focused platforms, internal district data-sharing, and student-focused software. In order to drive engagement with eCLASS, the district made its adoption part of the strategic plan.

Why Decentralize?

Systems that opt for a more decentralized implementation process often talk about creating the same kind of agency and personalized approach for each school that they are working to offer their students. The district/CMO not only benefits from a wide diversity of implementation strategies, but it is also able to test these approaches simultaneously. Teachers and school leaders are afforded greater opportunity for creative input and thus may also have the chance to take on new leadership roles. Students benefit from strategies that were built with them in mind, and may also have a greater opportunity to be part of the development process.



“You have to trust teacher expertise.”

Stepan Mekhitarian

Building Blended Learning Leaders' Capacity

Dr. Stepan Mekhitarian, the former blended learning coordinator of [Los Angeles USD's Northwest local district](#), which includes nearly 130 schools, explained that effective blended learning implementation requires buy-in and targeted focus on building capacity. His approach was to invite educators to learn more about the philosophy and application of blended learning through sequenced professional development on pedagogy and leadership. “Schools that utilize personalized learning effectively start with a cohort of engaged teachers who share their expertise and experience. Others see how personalized learning can impact student success and want to learn more. Mekhitarian’s approach to technology procurement had a similar flavor. “Most of the programs we saw being used in classrooms were free. Teachers asked each other what they were using. We had a site where teachers could see what others were doing and used resources to guide choices that were rigorous, engaging, and used real-time data. Teachers guided the process.”

“Our job is to empower the innovators, empower the schools, and empower our communities.”


Kevin Connors

Letting Schools Define Their Own Goals and Strategies

[Chicago Public Schools, IL](#), is one of a number of districts that has focused their resources on helping schools craft their own visions and on building their implementation plans from the ground up, supported by vetted personalized learning frameworks. “Our district leadership became excited about blended learning in part by seeing the incredible work being done independently in our schools, like [CICS West Belden](#) and [Chavez Elementary](#),” explains Kevin Connors, the director of personalized learning at Chicago Public Schools. “Our strategy is to provide schools with multiple pathways into personalization. We’re an intentionally opt-in model. This is all about building a grass-roots community.” This includes managing a team of school-based coaches and engaging external partners to provide professional development to teachers.

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.¹

	 Centralized District/CMO decides what and how to implement and how to measure success. Key Benefits: Efficiency/Alignment			 Decentralized Schools define their own visions, plans, and measures of success. Key Benefits: Agency/Diversity of Ideas/Commitment			
Teacher Benefit	No reinventing the wheel, less choice paralysis	Sense of safety and predictability	Connections with others doing the work (efficient information flow)	High engagement/ Opportunity for flexible exploration	Diverse opportunities for leadership and PD	Teachers with varying experience/ comfort can progress at own pace	
School Leader Benefit	Greater collective impact to improve district policies	Easier to demonstrate success because of shared focus	Fewer decisions to make/more streamlined processes	Diversity of solutions and voice	Increased empowerment due to fewer constraints	Greater trust of central office ("they trust us, so we trust them.")	Leadership pipeline through teacher leaders
District/ CMO Benefit	Measurement more targeted (apples to apples) and success easier to define	More consistent budgeting and lower variable cost at larger scale	Easier to manage turn-over (because of centralized training/processes, etc.)	"What works" created by on-the-ground trial and error	More diverse funding sources possible	Leadership pipeline through principal leaders/ less "compliance behavior"	

¹There is a rich dialogue in the field focused on exploring opposing ideas to produce more nuanced solutions. This table was inspired by the "pro-pro chart" used by the Rotman I-Think Initiative at the University of Toronto.

Why Combine Approaches?

The following example illustrates the benefits of blending both centralized and decentralized implementation.

“People think of district change as a three-year move, but it’s not. We have to think about long-term sustainability.”

Deagan Andrews

Centralizing Design Capabilities to Drive Decentralized School Strategies

Central office leaders in [Greeley-Evans School District 6, CO](#), developed a core capability to run design sessions to help schools create their own, personalized visions and implementation strategies around personalization. Director of Instructional Technology Deagan Andrews explains that the district uses “four key elements of blended learning” (student ownership, quality student-to-student interaction, targeted small groups, and tight feedback loops) as the drivers for the design sessions. Schools then design their own pathways to achieve these goals. As of spring 2018, all 25 schools in the district had gone through the process.

Taking it further



Lessons Learned

1. Even districts/CMOs with the most decentralized approaches employ “guard rails” or central standards to enable consistency and rigor of implementation.
2. Enabling schools to define their own path (that works for their students and community) can be an engine that generates the practices and ideas that system leaders will eventually use to scale more broadly.
3. One of the most important things district/CMO leadership can do is to define WHY it supports blended learning and what successful implementation will mean for students. If the driving values and desired outcomes for students are clear (both in terms of what they are and how they will be measured), schools can define their own path to get there.



Reflection Questions

- What does your vision for blended and personalized learning look, sound, and feel like?
- How might central office support enable more school autonomy?
- What structures would enable schools to learn from one another and to feed ideas back to the central office?
- What would an efficient decentralized strategy look like? What about a centralized strategy that provides genuine agency to all stakeholders?

Q1

How fast should we be moving from pilot to scale? What will help us best achieve sustainability?

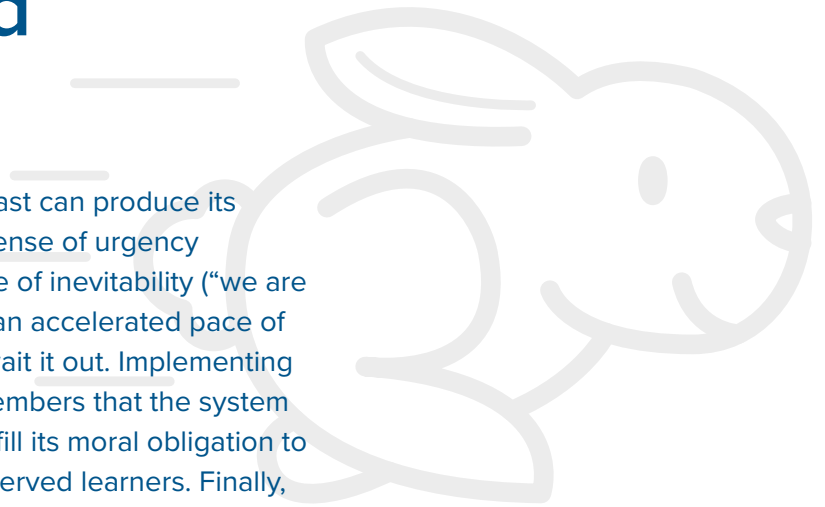
“Fast and Furious” vs. “Slow and Steady”

Districts/CMOs are under intense pressure to show positive results for students quickly and consistently for their boards, their state regulators and, most importantly, their communities. Yet leaders know that meaningful change often takes time and deliberate efforts, especially when collectively building new instructional approaches within a system. Move too fast and the system may sacrifice both rigor and teacher ownership. Move too slowly and the initiative may lose momentum and the authorization to continue.



Why go “Fast and Furious?”

While perhaps counterintuitive for some, moving fast can produce its own kind of rigor. Moving quickly can produce a sense of urgency throughout a system, and even sometimes a sense of inevitability (“we are all moving in this direction”) that may also lead to an accelerated pace of adoption, even by teachers who would normally wait it out. Implementing fast can signal to parents and other community members that the system is mobilized to make important changes and to fulfill its moral obligation to do everything it can, especially for its most underserved learners. Finally, as with any reform effort, there is often only a short period of time during which people will tolerate uncertainty. The faster the implementation efforts can show real results, the more authorization the district/CMO will have to continue.



“It showed what a school district could do in a short period of time that would not disrupt students, but would have massive implications for how well we could serve them.”

Ken Haptonstall

Accelerating Change Through District Reorganization

In the spring of 2018, [Mesa Valley 51](#), a district of 43 schools in **Colorado**, close to the Utah border, did a full [reorganization](#) of its central office under the leadership of new superintendent Ken Haptonstall. Mesa Valley 51 had previously committed significant resources towards distributed leadership throughout the district and a plan to move to a competency-based learning system. This reorganization served to realign district resources more actively towards this strategy and make a bold move to accelerate implementation. As part of the reorganization, every member of the central district office had to reapply for their job and, in the process, redefine the purpose and scope of their role. The superintendent participated in each interview, as did teams of teachers from across the district. Rebecca Midles, who leads the district efforts to personalize learning, explained, “The process allowed people to reinvent themselves and to stretch toward new goals. It gave people a new mission statement.”

“We felt it was too much work to ask of teachers in the first year.”

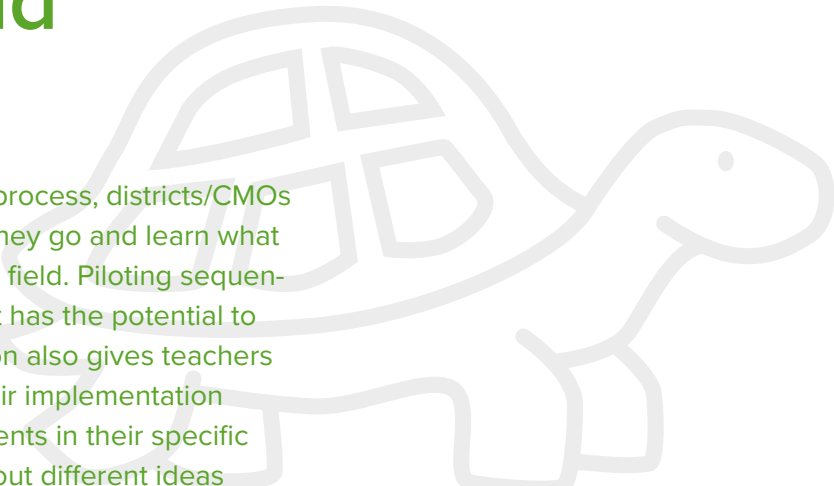
Elizabeth Anthony

Streamlining Ramp-Up In Early-Stage Implementation

Elizabeth Anthony, the associate director of blended learning for the [Alliance for Catholic Education \(ACE\)](#), helps to provide support to a network of 15 Catholic schools that partner with ACE, all of which serve students from lower-income communities. Anthony explains that limiting the tools and instructional approaches presented to teachers during an intensive ramp-up helped them implement faster and with more confidence than they otherwise could have. An intensive training session over the summer created consistency for teacher collaboration and made teachers' lives easier while they focused on implementing new instructional strategies (such as station rotation). “We had done a ton of research on how teacher-friendly different tools were. We were wary of any tools teachers had to personalize themselves because we thought it would be too much work for them in the first year.”

Why go “Slow and Steady?”

By engaging in a slow but steady implementation process, districts/CMOs have time to both correct wrong assumptions as they go and learn what works from teachers and other practitioners in the field. Piloting sequentially, rather than simultaneously, means each pilot has the potential to learn from previous iterations. Slow implementation also gives teachers time to find their own voice, take ownership of their implementation process, and personalize instruction for their students in their specific context. Moving slowly gives schools time to test out different ideas before locking in on what to scale more widely and it also offers time to test different technology platforms to see what best serves the needs of their students.



“We need whole-school exemplars here. That is what everyone is asking for.”

Kevin Connors

Using a “Soft Launch” to Gather Evidence of Success

Chicago Public Schools, IL, engaged in an “soft launch” of their scale initiative. Rather than making public announcements early on, they waited until they had strong examples of success from classroom pilots and then used those to promote a scale effort. Kevin Connors, director of personalized learning, explained that the district highlighted the voices of Chicago teachers, parents, and students when they began to implement more broadly. Students came together to talk about their experiences and pilot schools opened their doors to host tours for the community and other interested schools. In this way, community members did not have to take the value of the initiative on faith or have to rely solely on examples from other districts (that might not seem directly relevant). The soft launch also enabled district leaders to learn from the pioneering principals and teachers who had begun implementing personalized learning already on their own.

“Teachers and students should decide when to flip the switch.”

Michael Fauteux

Building Routines, Systems, and Habits of Mind Before Personalizing Learning

Leadership Public Schools (LPS), CA, has taken a deliberately moderate pace to enable culture change as a precursor to big instructional shifts. Director of Innovation Michael Fauteux recommends that systems, “start by talking explicitly about the things students need to think through: e.g., How do you take notes from different sources? How do you learn best? How do you give peer feedback, etc.” Fauteux explains that moving to personalized learning, even when there is strong buy-in, can sometimes set schools up to fail because the prerequisite routines, systems, and habits are not yet in place. “One of our biggest stumbling blocks in the beginning was not making those things explicit. Once students get their routines down, then it makes more sense to personalize—and then it becomes the student’s choice.”

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.

	 “Fast and Furious” Run many experiments simultaneously, learn through trial and error, and scale as quickly as possible. Key Benefits: Momentum/Access			 “Slow and Steady” Train and plan first, learn through sequential pilots, and gather information widely to distill what is relevant. Key Benefits: Rigor/Expertise		
Teacher Benefit	More energy and feelings of unity	Can fully invest because district/CMO is actively moving forward	Learn by doing, not by observing	Enables teachers to shift practice at a pace they can digest	Time for context-specific personalization in classroom	Rigorous alignment of software to curriculum
School Leader Benefit	Prioritizes obligation to provide access and opportunity to all students	Can quickly show school-based examples of success	Teachers driven to experiment and step outside of comfort zone	Ability to “own” what blended/ personalized learning means for the school	Time for lagging indicators to catch up	Time to assess who needs more help and provide it
District/ CMO Benefit	Prioritizes obligation to provide access and opportunity to all students	Jump starts innovation in schools that otherwise would not have it	Can capitalize on a political moment and/ or gain momentum	Can course correct based on lessons learned	Time to measure which interventions work best in which contexts and for which students	Better ability to assess which schools need more support

Why Combine Approaches?

The following examples illustrate the benefits of blending both “fast and furious” and “slow and steady” implementation.

“It’s about a commitment to transparency.”

Scott Fuller

Engaging the Community to Build Future Momentum

A number of districts emphasize the importance of strong community engagement as a way to “move slow to move fast.” [Trailblazer Elementary School](#) in [Colorado Springs School District 11](#) offers a prime example of gaining momentum through community engagement. By hosting “[seeing is believing](#)” tours, says coordinator Scott Fuller, the school invites parents and other community members to engage with the rationale and goals of personalization. In [Henry County, GA](#), school redesign teams are required to have both student and parent representation, as well as participate in producing [videos that explain each school’s approach](#). A final example is [Leadership Public Schools \(LPS\), CA](#) which includes students, parents, and teachers in their board meetings to make sure their voices are heard when high-level decisions are made.

“Scale requires deep engagement at each school.”

Stepan Mekhitarian

Building a Core Group of Teacher Champions

Dr. Stepan Mekhitarian, the former blended learning coordinator of [Los Angeles USD’s northwest local district](#), explains that effective scaling requires knowledgeable and passionate champions in and out of the classroom. It requires carefully balancing growing interest in personalized learning with targeted efforts to demonstrate how technology can enhance learning opportunities through collaboration and critical thinking. Mekhitarian believes that investing in the core groups of teacher champions at each school site can become an engine for accelerated spreading of practice throughout the system. “One of the benefits of moving slow at first is you’re looking at a lot of cases and if you go one-size-fits-all, there are a lot of places it’s not going to fit.”

Taking it further



Lessons Learned

1. Go slow to go fast. Don’t let a sense of urgency cause you to jump into rolling out an implementation process without careful planning and thoughtful communication. One system leader offered the following example, “We had a high school that was adopting a new learning platform. But they didn’t fully map out how they were going to scaffold students to get on the platform. A lot of teachers shut it down because they didn’t know how to do it and it led to a lot of difficult conversations.”
2. Everything is relative. How you define speed or deliberateness depends on your context, your community, and what you are ultimately trying to achieve.
3. There is a difference between piloting and system implementation. Learning about a tool or a model is different than full-scale adoption. These stages can be thought of differently when considering pace. Districts/CMOs should be seeing data that pilots are successful and getting input from students, teachers, and community members that things are working before launching into system-wide implementation. [The Trailblazer short-cycle innovation plan](#) is one way to think about moving from pilot to scale.



Reflection Questions

- How does your system define “speed?” What amount of time would constitute an aggressive scale strategy? A deliberate one? According to whom?
- Where might speed be genuinely useful in your system? Why? Are there places where moving faster leads to more rigor when it comes to implementing blended learning?
- Who or what is determining the pace of roll-out? Why?

How do we decide where to pilot and how to allocate resources to schools?

Prioritize Need vs. Prioritize Readiness

Most districts/CMOs have limited resources, both financial and in terms of human capital, which leads to well-documented capacity shortages. Leaders must continually make choices about how to distribute scarce resources, including their own time and energy. What criteria should leaders use when making these allocation choices? Focusing first on schools or communities with the most need honors a moral imperative to students, but if those communities have other priorities, the resources could go unused. Allocating based on interest and readiness may increase engagement and effectiveness, but also may funnel resources into areas where they are less needed.

Why Prioritize Need?

“Need” can mean a variety of things. It may describe schools that have historically been the most underfunded or under-resourced. It may also refer to schools with the highest achievement gaps, either between groups of students within the school or between the school and the rest of the district. Need may also arise due to a particular social moment or dynamic (such as a recent political or environmental event, or a sudden change in population). Regardless of how it is defined, allocating resources to the schools and students that need them most fulfills a fundamental promise of the education system: providing equal opportunities and access to all students.



“We are addressing need in a productive way.”

Kristen Watkins

Scaling Through Feeder Patterns

In [Dallas ISD, TX](#), blended learning leaders have scaled their implementation through [school feeder patterns](#), linking schools to create consistency of learning for students and strengthening the teacher network. This enables them to use a “need” criteria to cultivate engaged communities of practice. “We have a small but mighty team,” says Director of Personalized Learning Kristen Watkins. “We can’t support everyone that’s interested at once, but we want support to be high quality and continuous.” Watkins highlights that much of their work happens with the principals of schools within a feeder pattern. “If principals have the right mindset it helps ensure that we’ll see a real shift in instruction.”

“We tie our staffing to the number of schools and the level at which they’re implementing.”

Kevin Connors

Staffing to Address School Needs

In [Chicago Public Schools, IL](#), the third-largest district in the country with 660 schools, the team overseeing innovative practices is divided into school-based and central-office-based staff. The size of the schools team responds to the number of schools that are actively implementing personalized instructional

strategies. For example, for every 15 schools that are implementing a whole-school model, they staff three instructional leads and two social emotional learning (SEL) leads. The central office staff is kept lean, overseeing the effectiveness of the technology being used, the impact of the district’s various cohort programs, and the overall implementation strategy. This model enables the district to be responsive to schools’ needs as their practices change over time.

“You’re talking about a cultural transformation and you’re not going to get that without the leaders demonstrating it.”

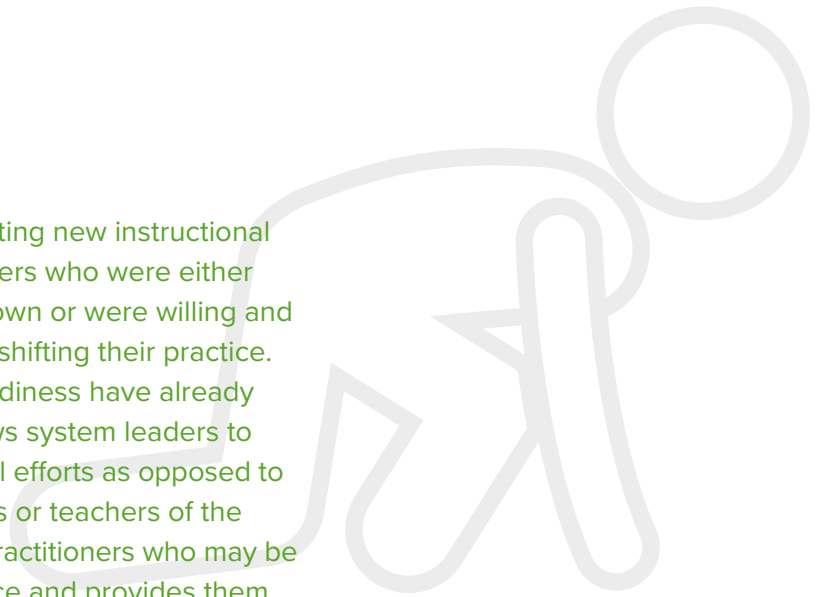
Lisa Williams

Training Leaders First

When leaders in [Baltimore County Public Schools, MD](#), designed a strategy to increase equity in their district, they were deliberate to start by training central office and school leaders. Dr. Lisa Williams, the executive director of the Office for Equity and Cultural Proficiency explained that starting with teachers can create a support gap when they need help from their leadership. By training principals and central office administrators first, they could then hone in on schools with the greatest need knowing leaders could support the change.

Why Prioritize Readiness?

Many leaders expressed the importance of piloting new instructional practices with school leaders and/or with teachers who were either already engaging in blended learning on their own or were willing and able to dedicate significant time and energy to shifting their practice. Schools that make an effort to demonstrate readiness have already shown their commitment to continue. This allows system leaders to play the role of “cheerleader,” supporting school efforts as opposed to spending time trying to convince school leaders or teachers of the value of change. It also taps into a network of practitioners who may be engaging in highly effective instructional practice and provides them with future leadership opportunities.



“They’ll say, ‘We have to adapt, but boy do we want that.’”

Rebecca Midles

Seeking Out the Most Eager Teachers to Pilot

In [Mesa Valley Country District 51, CO](#), leaders sought out teachers who were the most eager to pilot to observe new instructional models in other classrooms, schools, or districts. As Rebecca Midles, executive director of teaching and learning in Mesa explained, “Leaders often send people who are on the fence or people who have the most influence. But they will often say, ‘That model is okay for THIS school, but not ours.’ If you send people who are excited, you get a different outcome. They’ll say, ‘We have to adapt, but boy do we want that.’”

“Each school started with a question: How will their instruction change when they get new devices?”

Heather Van Looy

Using a Readiness Assessment to Efficiently Structure Roll-Out

In [Fulton County, GA](#), district leaders decided that the first step in a district-wide commitment to personalization was to understand the readiness of each of their 95 schools to adapt new instructional practices using technology. Starting in 2014, all schools took a standardized “readiness assessment” that looked at schools’ infrastructure, technology, and instructional readiness. Schools then put themselves into one of five “roll out” groups that would launch over the course of the following three years. Within the first year of implementation, each school knew its strengths and weaknesses and could predict the time frame it had to upgrade its infrastructure and develop new instructional practices. Fulton communicated this roll out widely and publically, even putting together a [Roll Out Dashboard](#) that shows the progress of each school over time.

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.

 <h2>Prioritize Need</h2> <p>Start with those who need it most. Central office drives engagement.</p> <p>Key Benefits: Access/Equity</p>	 <h2>Prioritize Readiness</h2> <p>Start with those who show the most interest and readiness. Schools and teachers drive engagement.</p> <p>Key Benefits: Engagement/Efficiency</p>	
Teacher Benefit	<p>Resources targeted to needs of teachers and students</p> <p>Supports high expectations and pride in all students</p> <p>Access to previously unavailable resources and support</p>	<p>Can build on what teachers are already doing</p> <p>Reward for earlier risk-taking and innovation</p> <p>New leadership opportunities</p>
School Leader Benefit	<p>If successful, narrows student achievement gap</p> <p>Can provide innovative reform to underserved communities</p> <p>Assessing need may increase system support and resources</p>	<p>Teachers can drive the process forward (less “wrangling”)</p> <p>May fit the strategic model of the school</p> <p>Pride for work already accomplished</p>
District/CMO Benefit	<p>If successful, narrows student achievement gap</p> <p>Assessing need can illuminate important data</p> <p>Platform to address system-wide inequities</p>	<p>Strong success stories likely with people who are already engaged</p> <p>Schools/teachers powerful promoters for innovation</p> <p>Can be facilitator rather than “professional developer”</p>

Why Combine Approaches?

The following examples illustrate the benefits of blending both need and readiness.

“Who is at the table? Who is deciding the process?”

Michael Fauteux

Sharing Power Through Resource Allocation

Michael Fauteux, the director of innovation at [Leadership Public Schools](#), highlights the importance of designing WITH and not FOR communities when making allocation decisions. “It’s important to resource based on need and not on power,” Fauteux explains. By bringing students, parents, and other community members to the table as designers, leaders can consider the needs of students more actively and partner with communities equitably, especially those whose voices are frequently marginalized. “This means you will include everyone instead of starting with the majority in the middle and trying to figure out how to retrofit practices later when they don’t work for those outside the middle.”

“We are building capacity slowly over time.”

Karen Perry

Offering Differentiated Supports to Schools in Different Phases of Implementation

[Henry County, GA](#), is one of a number of districts that offers different kinds of supports to schools in different phases of blended learning implementation. Schools in Henry County apply each year to be [part of a cohort](#) engaging in school redesign. District leaders learned over time that changing instructional practices is a long process and that schools still need support after year one. In addition to a three-year grant (reallocated from professional development funds), schools receive targeted support (through ongoing discussion and mentorship) from district leaders, leadership development, and instructional coaching based on their phase of implementation. In this way, readiness to engage determines school entry into a personalized learning cohort, but need determines support from the district as schools progress.

Taking it further



Lessons Learned

1. As with any resourcing question, there is a critical equity consideration at the center of this tension. Regardless of how the district/CMO makes staffing or resourcing decisions, the more student, teacher, and community member voice is part of the decision-making process, the more attuned system leaders will be to what resources are actually needed and where.
2. “Readiness” is about teachers and school leaders having the willingness to engage with new practices but also having the skills/knowledge to do so.
3. Regardless of how allocation decisions are made, communicating these decisions clearly, transparently, and consistently offers the most agency to schools and enables them to make empowered choices.



Reflection Questions

- Who and what determines “need” or “readiness?”
- How much of the resource allocation decision should be top-down, (i.e., district/CMO leaders choose what to fund, when, and how) and how much should be bottom-up (i.e., schools put a plan together to request support in a way that best serves their needs)?
- To what extent does flexibility (of central office support, funding, and other resources) help or hinder change efforts?

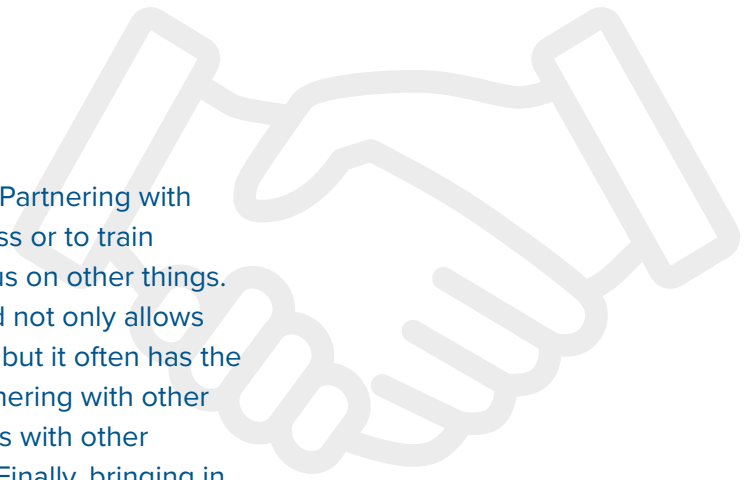
How should we develop our talent and resource pipeline?

Build Internally vs. Buy Externally

Leaders involved with blended learning implementation for a number of years consistently reminded us that the work takes time. Ken Eastwood, former superintendent of Middletown School District, NY, told us, “You can’t change things in three to five years. I’ve been here 14 years and we’re still cleaning up the edges.” Similarly, Deagan Andrews, director of instructional technology in Greeley-Evans School District, CO, explained, “We’ve been doing this for five years and it still feels like we’re just beginning. I honestly think 25 years is where sustainability hits.” Given this sustainability challenge (with limited resources), districts/CMOs face important decisions about how to build capacity. Sourcing external support (e.g., resources that other districts or CMOs have developed or partnering with intermediary organizations that provide services like professional development) means practitioners do not need to continually “reinvent the wheel.” But building internal capacity enables long-term sustainability through context fit and a strong leadership pipeline.

Why Buy/Partner Externally?

Bringing in external resources carries many benefits. Partnering with external organizations (e.g., to assess school readiness or to train teachers) frees up capacity for system leaders to focus on other things. Bringing in curricula that has already been developed not only allows teachers to focus on teaching, not resource building, but it often has the added benefit of having been previously tested. Partnering with other organizations can widen networks and strengthen ties with other community organizations (such as local universities). Finally, bringing in external support can often be cheaper in the long run than cultivating new capabilities from scratch internally.



“They are so well prepared to manage a personalized learning environment. It was really exciting to see. We didn’t know it would play out that way.”

Kristen Watkins

Partnering with a Local College to Develop New Teacher Training Opportunities

As a way of strengthening its pipeline of qualified personalized learning teachers, [Dallas ISD](#), in partnership with [Raise Your Hand Texas](#), developed a [graduate program for teachers](#) focusing on personalized learning. Teachers have the opportunity to earn a Graduate Certificate or Master’s Degree in Blended and Personalized Learning from Texas Tech University. Dallas ISD also partners with [Texas Tech’s Tech Teach](#) program to place student teachers in personalized learning classrooms for their practicums. This partnership allows for the district to hire first-year teachers who already have experience in personalized learning environments.

“In CPS, schools and communities are the drivers of their personalized learning models.”

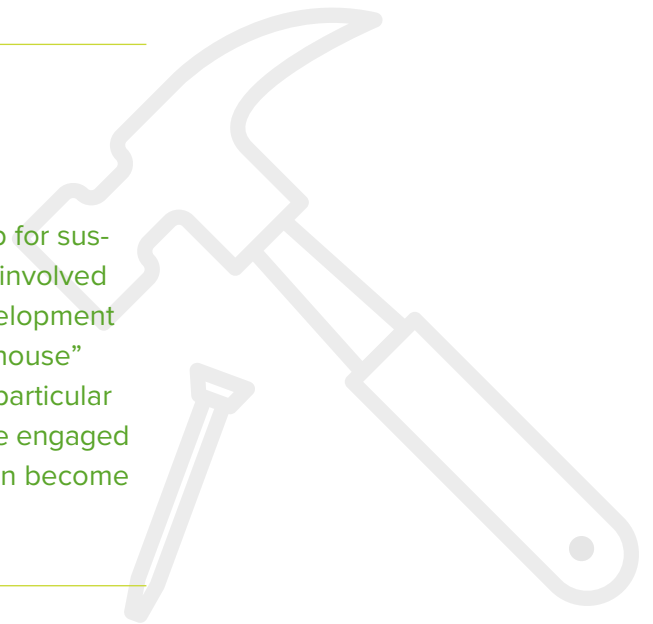
Kevin Connors

Leveraging External Partnerships to Build a Grassroots Movement

In [Chicago Public Schools \(CPS\), IL](#), leaders have leveraged external partnerships such as professional development training for teachers developed by local partner [LEAP Innovations](#), not only to free up central office capacity but also because of the signal it sent to school leaders who were wary of anything that seemed like district mandates. While the district has vetted a group of external partners and frameworks, leaders in CPS have opted to let schools [make their own choices](#) about who to partner with externally and how to build their capacity, offering support in the form of school coaching, thought-partnership, and, in some cases, seed funding. CPS leaders believe that this helps create a stronger ecosystem between organizations in the community, but also enables personalized learning to spread as a grassroots movement.

Why Build Internally?

By building internal capacity, school systems set themselves up for sustainability despite resource or personnel constraints. Teachers involved in developing new tools, curricula, or running professional development can set themselves up for future leadership roles. Building “in-house” tools, such as district dashboards, creates a strong fit with the particular needs of the system. Perhaps most importantly, when people are engaged in designing, and not just implementing, new practices, they can become more engaged and have a deeper connection to the practice.



“We want them to be really great teachers first. That’s where personalization comes from.”

Ken Eastwood

Improving General Instructional Practice First

Middletown Public Schools, NY, started its blended and personalized learning implementation with a focus on developing high-quality instructional practices before introducing any technology or blended learning instruction. Ken Eastwood, former superintendent of Middletown Public Schools, explained that the district focuses on intensive staff development, including a multi-year series for new teachers to boost instructional practice before diving too deeply into technology use or personalization strategies. “Pedagogy trumps technology,” he says.

“They don’t get a ‘badge’ or a trophy. They get deep community support.”

Kristen Watkins

Developing Teacher-Leader Pipelines

In the Dallas ISD, TX, district, leaders have created a number of pathways for teachers to deepen their knowledge in blended and personalized learning. One of these is voluntary participation in a “community of practice” with other educators. These communities of practice involve monthly time commitments (consisting of either a face-to-face or virtual check-in with a coach, or time spent learning online). Many of the teachers and school leaders who participate are also involved in personalized learning campuses or feeder patterns, which reinforces opportunities for peer mentorship and community building within close geographic areas. These communities developed as an extension of Dallas’s Innovation in Teaching Fellowship which, like the Fulton County Vanguard and the Highlander Institute’s Fuse Fellow program, was created to develop their teacher-leader pipelines.

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.



Buy/Partner Externally

Systems scout for and use resources and services created or provided by other organization.

Key Benefits:
Validation/Ease



Build/Develop Internally

Systems develop resources in-house and cultivate internal human capital capabilities.

Key Benefits:
Strength of Fit/Sense of Connection

Teacher Benefit

Focus on teaching, not resource building

Expert help available for troubleshooting

Peace of mind ("Other people are using this")

Aligned with own students and context

Align organically on unit planning with other teachers

Deep knowledge of curriculum and why using it

School Leader Benefit

More manageable ask of teachers

Can share prior evidence of success with community

Cheaper to procure resources than to invest in creating them

Aligned with "our" students and context

Enables staff to become leaders, not only implementers

Potential for high teacher engagement

District/CMO Benefit

Less "reinventing the wheel"

Connection to other districts/CMOs who are using similar resources

Available proof points in other systems (credibility)

Strength of fit with system mission and culture

Can accomplish goals even when nothing "quite right" exists

Enables succession planning

Why Combine Approaches?

The following example illustrates the benefits of both buying externally and building internally.

“Working with an external partner was a major key to our success. It gave us a place to start that we would not have had otherwise.”

Kimberly Richards

Partnering Externally to Cultivate Capacity Internally

Dallas ISD, TX, and Fulton County, GA, are two districts that used an external partner as a way to develop skills and knowledge within the district. Leaders in Dallas engaged the education consulting group SchoolWorks to help them develop protocols and conduct their school visits. Similarly, leaders in Fulton County engaged Education Elements to help them develop, among other things, their communication and professional development plans as well as strategies for conducting “learning walks” of schools and engaging teachers and school leaders to understand their current practices. In both cases, district leaders acknowledged that having a partner early on provided helpful frameworks and guidance and, perhaps just as importantly, also provided a sense of validation to drive the work forward.

Taking it further



Lessons Learned

1. External partnership can be a powerful way to cultivate internal capacity. The key is in developing relationships that enable knowledge and skill-transfer, rather than outsourcing capacity over the long term.
2. External partnership can also be a helpful way to enable system leaders to step back and give schools greater choice and agency. By playing a “connector” role, rather than a “director” role, leaders can focus their energy on support and development, as opposed to guiding school implementation strategy.
3. Schools are not bound by pre-determined “offerings” of external partners or products. As one school leader told us, “We realized that we were altering our behavior to suit our technology platform, rather than the other way around, so we stopped using it.” The product and service should serve the system’s strategy, not drive it.



Reflection Questions

- Where would it be useful for schools to go through a deliberate design process and where might it be an unnecessary expenditure of energy? What is the teacher’s role in the process?
- What roles will you need staffed internally in three years if you were to scale effectively? In five years? Where will those people come from? Where will the funding come from?
- To what extent should local school context drive partnering decisions? Where should partnerships be centrally managed vs. locally managed?

Q4

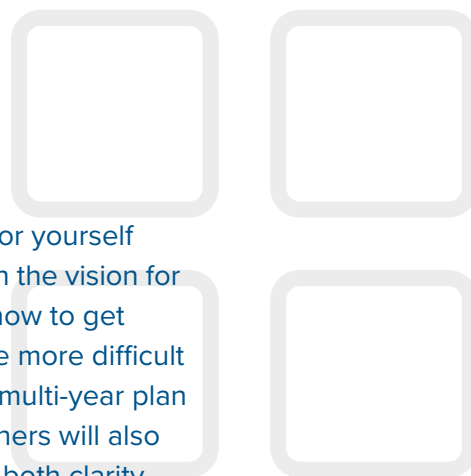
How flexible should our district strategy be over time?

Fixed Strategy vs. Adapt with Experience

Strategy is not simply a list of activities. It is a hypothesis for how to achieve your goals. The more fixed your implementation strategy is, the easier it is to communicate through your system, enabling others to predict what might be coming next and make their own choices, knowing they will be aligned with central leadership. Yet strategy is also just a guess about what will work. If your implementation plan cannot adapt as you learn, the district/CMO could face painful mismatches between central office predictions and on-the-ground experience as well as miss crucial opportunities to engage with the voices and viewpoints of others in the community.

Why Create a Fixed Strategy?

Setting a strategy is all about creating the clarity and transparency for yourself and others to make aligned choices. If you cannot communicate both the vision for the transformation you are working to accomplish and the plan for how to get there, others will be unlikely to buy into it. More importantly, it will be more difficult for them to make their own choices that support it. Creating a clear multi-year plan provides school leaders the stability to set their own agendas. Teachers will also have more of an incentive to engage with a change effort if there is both clarity about what engaging means and also a well-articulated logic for how it will produce the desired outcomes for students. Finally, committing to following through on a strategic path over a set period of time may make it easier to raise funds and to communicate value to community members and to your board.



“When change on the inside is slower than change on the outside, the end is near.”

Lisa Williams

Declaring a District Mandate

A number of districts, including [Middletown, NY](#), [Fulton County, GA](#), and [Baltimore County, MD](#), chose to publicly declare that all schools (or all teachers) in the district will eventually be expected to integrate into a personalized learning pathway by a certain date. Ken Eastwood, former superintendent in Middletown Public Schools, set a teacher-focused mandate, making implementation voluntary for the first two years and offering teachers incentives to participate. He also removed the pressure of certain evaluations for those two years. By year three, teachers who had not volunteered were required to engage in targeted professional development. In Fulton County, schools were asked to slot themselves into one of five cohorts of schools that would roll out blended learning implementation over a two-year period. Dr. Lisa Williams in Baltimore County explains that declaring a mandate is also about making a commitment to student equity of opportunity. “The idea of personalizing without talking about equity seems antithetical to the whole point,” she said. “I often hear people talk about using technology without looking at the root causes of why it’s important. That’s something you have to mandate at a system level.”

“This is about developing our own belief that we can grow as a district.”

Rebecca Midles

Deliberately Creating a Culture of Change

Rebecca Midles, executive director of teaching and learning at [Mesa Valley 51, CO](#), believes that system-level transformation requires a

culture where people believe they (and their students) can grow and change. In order to cultivate this culture, she spent two years building awareness and skills associated with [Carol Dweck’s work on growth mindset throughout the district](#), starting with its leaders. Teachers began to reassess the way they rewarded and praised students and helped students set individual goals that cultivated real growth. “Before we made a move to competency-based learning,” Midles explained, “We had to believe that WE could do things differently. Focusing on growth mindset has allowed us to re-examine what we hold dear. It allows us to open the door and ask, ‘is this learner centered or is this adult centered?’”

“Most ESSA-related measures aren’t pushing the envelope, but they could.”

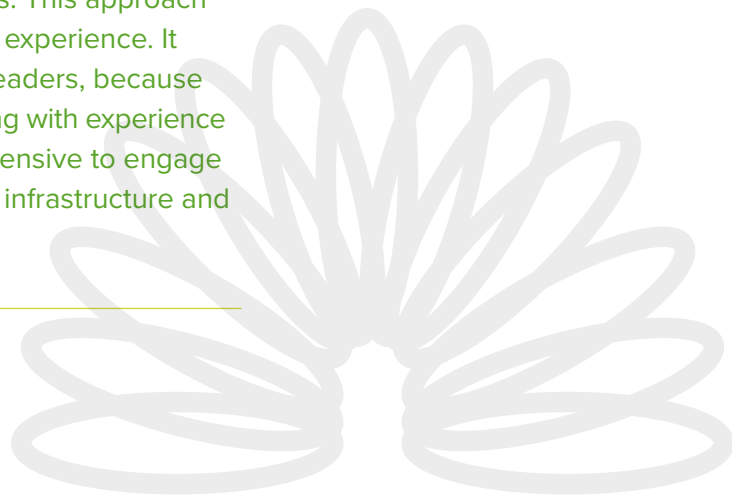
Karen Perry

Applying for State Innovation Waivers to Support Long-Term Transformation

Some districts have received [Innovation Waivers](#) from their state, enabling their schools to pursue new, innovative strategies while being provided a greater degree of autonomy and an ability to waive some statutory requirements. This strategy promotes a longer-term horizon on the one hand, but also offers districts breathing room for some adaptive experimentation on the other. Karen Perry, coordinator of personalized learning in [Henry County, GA](#), explains that in Georgia, while the state does not waive things like test scores or attendance and graduation rates, there are other things inside those categories (such as maximum class size, seat time requirements, or teacher certification requirements) that can be waived more easily. Perry notes that by defining more targeted measures of success they are better able to meet the needs of the district and the strategy they are working to enact.

Why Create an Adaptable Strategy?

Our predictions about what will work (and how) are not genuinely tested until we begin to implement an initiative. By building in feed-back loops and reflection points from the beginning, district/CMO leaders can connect more quickly to what is working (and what is not) and glean ideas from teachers, school leaders, and community members. This approach enables scale efforts to reflect lessons learned through experience. It amplifies the voices of students, teachers, and school leaders, because their feedback is integrated in a meaningful way. Adapting with experience may also be a better use of funds because it is less expensive to engage in small prototypes than to invest from the beginning in infrastructure and resources that may or may not be effective.



“We’ve been learning tons about our kids and our community.”



Jonathan Hanover

Letting Experience Guide Strategic Choices

Roots Elementary, a K-5 charter school in Denver, uses technology along with innovative staffing, curricular, and physical structures to provide a student-centered learning experience. While poised to expand, leaders have been careful to not rush to scale in order to employ a strategy of deliberate model testing over time. This adaptive strategy has helped them better understand what practices are robust enough to scale in the long-run. Jonathan Hanover, founder of Roots, gave the example of community building in the school. “After the first year, we noticed that the kids that were struggling the most with a highly individualized model were the ones who had experienced the most trauma in their lives. Based on this learning, we devoted far more time to understanding how the brain works, mental health, and developing a strong, nurturing community within the school. It’s hard to let go of pieces of the model we thought defined us, but in the end we created something that worked better for our students.”

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.

 <h2>Fixed Strategy</h2> <p>Decide purpose and overall method of full-scale implementation from the outset.</p> <p>Key Benefits: Predictability/Stability</p>	 <h2>Adapt As You Go</h2> <p>Use ongoing feedback systems/short-cycle prototyping to determine next steps.</p> <p>Key Benefits: Validity/Ongoing Improvement</p>		
Teacher Benefit	<p>Clearer connections between changes in school and district/CMO strategy</p> <p>Understand the pathway of transformation step-by-step</p> <p>Easier to make decisions because trajectory of the entire system is clear</p>	<p>Can influence the entire system by demonstrating success</p> <p>Engagement through autonomy and agency</p> <p>Communication to community based on lived experience</p>	
School Leader Benefit	<p>Can set own school strategy based on central strategy</p> <p>Can communicate with confidence and consistency</p> <p>Enough information to make bolder, disruptive moves</p>	<p>District/CMO leaders can manage through engagement, not compliance</p> <p>Support for diversity of ideas about what works</p> <p>Individual schools can influence the system as a whole</p>	
District/CMO Benefit	<p>Can offer compelling narrative about where system is going and why</p> <p>Can engage in long-term planning efforts</p> <p>Consistency aids measurement and evaluation efforts</p>	<p>Cheaper to rapid prototype on small scale than to invest in massive infrastructure</p> <p>Avoid “going full tilt” and not succeeding</p> <p>Stronger pipeline of engaged teacher and school leaders</p>	

Why Combine Approaches?

The following example illustrates the benefits of both setting a fixed strategy and adapting with experience.

“Our process is intentional, but it’s changed over time.”

Karen Perry

Adapting as the “Rubber Meets the Road”

In **Henry County Schools, GA**, district leaders set a long-term vision and definition for personalizing learning, but started their implementation process by giving schools high levels of flexibility about what and how to engage. As they learned from experience, however, they adapted their engagement process with schools and modified the kinds of supports they offered to better fit schools’ needs. This meant constructing clearer (and in some cases stricter) “guard rails,” higher expectations for what schools must demonstrate before accessing district funds, and differentiated supports for schools at different stages in their implementation process. The district also created new professional development opportunities (such as the Gold Leadership Academy for principals) and a “Personalized Learning School Implementation Rubric” to help schools identify what they should be seeing as they move to a personalized model. Nithi Thomas, former director of instructional technology for **Matchbook Learning**, explains that, “Even the most well thought out and planned strategy should have the flexibility to meet the needs of your stakeholders.”

Taking it further



Lessons Learned

1. While being adaptive is often associated with greater school autonomy, providing clear guidelines and fixed, predictable outcomes for the actions schools take can reduce anxiety and confusion about how to proceed. This may create more, rather than less, engagement from teachers and school leaders.
2. Fixed strategies may be associated with greater efficiency (because they can lead to more consistent and predictable actions), but running small, low-cost experiments in the tradition of lean startup may be a more efficient way to explore multiple strategies at once, leading to better informed, higher value implementation at scale.



Reflection Questions

- How can your district/system create short learning cycles that provide high levels of feedback from the classroom to the central office? What do you, as the leaders of blended and personalized learning, need to know about what is working (and not) in your classrooms? How do you collect, track, and reflect on this data?
- What is a Minimum Viable Product in the context of blended learning implementation in your system? Is it a whole-school strategy? A new professional development opportunity for teachers? A test of one new way to collect and use student data?
- What are some fixed commitments or guidelines you could set that might spur, rather than diminish, innovation?

Q5

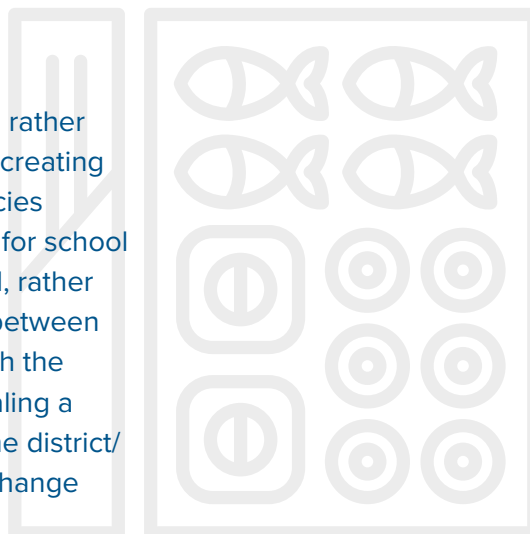
Should we scale a comprehensive model throughout the system or provide access to a series of independent, modular resources or tools?

“Prix Fixe” vs. “A la Carte”

Districts/CMOs looking to encourage the adoption of blended learning strategies in a highly rigorous way may create a fixed, or encapsulated, implementation model to do it. This may mean that schools must adopt a set of practices, commit to a series of trainings, or adhere to a set of procedures or policies, in order to be eligible for district-level supports and funding. A benefit of this “Prix Fixe” model is that it creates coherence across the system in terms of how implementation is being done, which also provides a better platform for measurement and evaluation. The downside of this, however, is that it can be less responsive to local school culture and environment and risks losing teacher engagement by limiting their flexibility. Creating a “Prix Fixe” model also assumes that leaders know the right set of components that lead to high-quality implementation, which may not always be the case.

Why “Prix Fixe?”

“Prix Fixe” implementation treats blended learning as a system, rather than an isolated set of activities. It considers the importance of creating coherence between classroom practices and system-level policies and resource-use. “Prix Fixe” models may be more predictable for school leaders and teachers because the school is replicating a model, rather than creating one from scratch. It can also aid communication between people in the system, if they know that others are engaging with the same series of activities or stages of transformation. Finally, scaling a whole, encapsulated model may make it easier for leaders in the district/CMO to troubleshoot and also to create a coherent culture of change throughout the system.



“Did technology supplement a worksheet or truly enhance what was happening in the room?”

Holli Brown

Creating Coherence Through Coaching

Gwinnett County Schools is a district of 139 schools located just northeast of Atlanta, GA. In order to create coherence across schools that are starting to experiment with blended models, Gwinnett has developed an extensive network of coaches throughout the district to help integrate its [eCLASS](#) technology platform. Each school has “lead innovators,” or grade-level teacher leaders who receive ongoing training to share ideas and tools with others in their grade. Lead innovators are trained and guided by centrally located “uber coaches,” who do 1:1 coaching, plan professional development, and help with school-level collaborative planning. The uber coaches also get ongoing support, from an experienced district mentor who oversees the way coaches and innovators are connecting. Each school also has a school technology coordinator whose role has evolved over the years from being an IT role to an instructional support role. All of these coaching structures work together to form a tight network of support, as well as create consistent implementation practices across schools.

“Schools apply to be part of the design process and, by 2020, all 50 of our schools will have redesigned around our north star of student agency.”

Karen Perry

Scaling Using a Cohort Model

In **Henry County, GA**, schools apply to be part of [phased cohorts](#) that drive the district transformation process. This includes, among other things, going through a [competitive application process](#), developing a school plan for redesign, building staff capacity, and engaging with their communities around school transformation in exchange for district support (of both time and resources). Similarly, in **Fulton County School District**, one of Georgia’s largest charter networks, schools have also implemented as part of cohorts that experience a “Prix Fixe” set of redesign responsibilities and supports. In **Dallas ISD, TX**, that process also exists at the teacher level with deliberate professional development and communities of practice for teachers who choose to engage.

Why “A la Carte?”

While a “Prix Fixe” model revolves around consistency and coherence of implementation, “A la Carte” models focus primarily on fidelity. The logic behind offering a menu of choices for school leaders and teachers to adopt is that choice brings both flexibility and authentic engagement. Rather than following a packaged process, teachers drive progress by using tools and instructional methods that directly support their teaching. It provides school leaders room to be teacher champions, rather than having to “sell” a model, and it empowers teachers with more control and more freedom. It also leaves room for students and community members to be part of the design process.



“Micro-changes add up.”

Michael Fauteux

Scaling Small Practices Organically

Leadership Public Schools (LPS), CA has built a system to scale instructional practices (such as exit tickets or teacher-peer feedback) that enables teachers to test small classroom shifts and see evidence of change first-hand before adopting blended learning full-scale. These tests become “micro-pilots” of change that put the control squarely in the hands of teachers to shift their practice in ways that are meaningful to them and their students. “Piloting should be done for proof of concept, not for the purpose of scaling,” says Michael Fauteux, director of innovation at LPS. “It’s a way to test if an idea has legs, not to turn to another school and say, ‘you should do exactly what we’re doing, because it worked for us.’” Creating a “modular tool belt,” says Fauteux, helps makes change authentic and organic.

“It’s not pilot, then scale everywhere. We are developing a culture where experimenting can happen.”

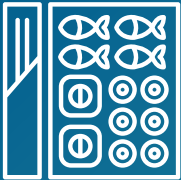

Deagan Andrews

Developing a Culture of Experimentation

In Greeley-Evans, CO, the district insists on only voluntary, teacher-driven engagement that looks different depending on the school or teacher’s context. Deagan Andrews, director of instructional technology, explains, “We’ll never force schools to change. If a teacher isn’t ready to implement, we don’t want them to do it. It’s not pilot, then scale everywhere. We are developing a culture where experimenting can happen.”

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.

	 “Prix Fixe”				 “A la Carte”			
	Scale means replicating a full model or process (a package deal) that you work to implement in its entirety (including resources, training, policies/procedures, metrics, etc.).				Scale means identifying, supporting, and spreading small, modular changes that can be learned and adopted independently by schools and/or teachers.			
	Key Benefits: Coherence/Predictability				Key Benefits: Flexibility/Fidelity			
Teacher Benefit	Higher chance of coherence across subject areas and classes	Shared vocabulary and expectations amongst colleagues	See personalization as a system, not a set of isolated activities		Can use whatever methods best meet needs of students success	Can test one small idea at a time, rather than change entire practice success	More control and agency	Feedback from students and school community relevant to setting course
School Leader Benefit	More predictable support from central office to schools	Coherence among teacher activities	Easier to navigate school redesign model	Enables global culture of change	Process driven by teachers	Takes culture of the school into account	Acknowledges different school leaders are trying to solve different problems	Less “selling” more “championing”
District/CMO Benefit	Ability to forecast needs of schools year-by-year	Can spot and address systemic operational challenges	Enables culture of change in a way that incremental shifts may not	Possible access to deeper funding pools	Possibly less union pushback	Can make small but powerful changes quickly across the entire system	System will be designing for actual, not imagined, needs	

Why Combine Approaches?

The following example illustrates the benefits of both “Prix Fixe and “A la Carte” implementation.

“Success is when the district puts out clear guard rails and the school is able to operationalize them.”

Karen Perry

Employing Guard Rails to Enable School Autonomy

Henry County Schools, GA, has adopted the approach of creating a clear, centralized framework that it shares across its system of schools, in the form of a set of five key “tenets” or pillars of personalized learning. Schools participate in a centralized redesign process, but they have the freedom to focus on the specific pillars of the district vision that best fit their context. And while schools have the freedom to pursue their own pathway to personalization, there are clear district guidelines around the process (e.g., schools must include students and parents in the design process, all teachers must have access to pilot classrooms, etc.).

Taking it further



Lessons Learned

1. A number of leaders have described engaging in an “A la Carte” model until they have the data and experience to put together a “Prix Fixe” model driven by what has already been shown to work in the classroom and/or in schools.
2. Models vary widely based on how a district or system defines blended or personalized learning. Examples include: personalization as a district/CMO philosophy, as a model for organizing school redesign, or as an instructional model. While these are clearly related, they also motivate slightly different approaches. A focus on instructional change, for example, may inspire a more “A la Carte” approach, while a goal of whole-school redesign may be better suited to a “Prix Fixe” model.



Reflection Questions

- Barring all barriers, what would complete success look like for your district or system to implement and scale blended and personalized learning?
 - Would it be teachers actively innovating in their own ways and using different approaches or a coherent, system-wide approach to instruction?
 - Would these approaches be captured?
 - Does your vision require lockstep activities between schools?
- Sketch out this future reality with as much specificity as possible.

Q6

How might practitioners best learn from one another? What should we be cataloging and sharing throughout the district?

Share Best Practices vs. Share Process/Failures

Innovative instructional strategies emerge daily in classrooms across the country as teachers and students navigate their learning together. Districts/CMOs not only have to find ways to support communication between teachers (in order for the practices to spread), but they can also influence WHAT is shared. It is most common to share “what works” (the result of a trial and error process) in order to pass along ideas others might use. Because all contexts are different, however, sharing only the output of a process may not be that useful. Sharing the process itself (as well as failures along the way) offers a richer foundation to spread ideas, but can be cumbersome and inefficient.



Why Share Best Practices?

Sharing best practices has the benefit of being relatively efficient. It hands off successes for others to emulate, which may save them time and energy. It provides a sense of trust because people can see evidence of value in the endorsement by a peer. Finally, if done well, it can be implemented without the need for extensive context about its origin.

“We were successful at the elementary level because we had a coherent model, content, and a curriculum that teachers could adopt.”

John Rice

Using Model Classrooms and Classroom Models

Rather than starting from scratch, it is helpful to have frameworks for thinking about how to personalize learning for students. John Rice, former director of education technology in [DC Public Schools](#), said that having clear, replicable models at the elementary level (such as station rotation) contributed to the success of their preliminary scale efforts. Whether using Highlander’s [Personalized Learning Progression](#) or TLA’s resources on [station rotation](#) (try [this one](#), too), teachers can benefit from exploring classroom models that are demonstrated in other classrooms across the county. Using models can be helpful for scaling at the district level too, (as this resource hopefully demonstrates!). See [here](#) for additional models of change management.

“I gather best practices and pass them from classroom to classroom.”

Jason Behrens

Using a Central Coordinator to Communicate Strategies

Jason Behrens, innovation project specialist in [Somerville Public Schools, MA](#), remarked that one of the most important functions he plays in his district of 10 schools is to spend time doing observations and passing along what he sees to other teachers. By supporting what teachers are already doing, Behrens acts as the conduit for helping to elevate innovative ideas. He also connects teachers with other teachers to share what they have done. “I found early adopters and brought them to teach others in professional development sessions.”

Why Share Our Process (and Failures)?

It may seem overly complicated to share our process for testing ideas or too risky to share our failures. But this information is crucial for enabling others to engage in new practices. It communicates logic, not just outcomes, which provides others with a pathway to adapt practices to their own contexts. It also contributes to a general culture of openness and a learning orientation throughout the system.



“The most important thing we can do for schools is to challenge them to think more boldly.”

Aaryn Schmuhl

Communicating the Value of Making Mistakes

In Henry County Public Schools, GA, district leaders have prioritized communicating to school leaders and teachers the areas the district itself is innovating and iterating in cycles to improve practice in places they are not yet successful. They continually work to communicate the value of taking risks in shifting practice and being transparent about what isn't working. Aaryn Schmuhl, chief leadership officer, explains, “A key factor of district support was letting schools know they could experiment and fail and revise. We did this by having everyday informational conversations with school leaders where we offered reassurance that it was ok to take a risk.” Dr. Stepan Mekhitarian, the former blended learning coordinator of Los Angeles USD's northwest local district similarly explained that “I don't have all the answers. No one is an expert in this field. My job is to connect practitioners so they can learn from each other.”

Benefits at a Glance

Seeing the benefits of competing priorities side-by-side can help leaders chart their strategic pathways more deliberately, and with increased empathy for multiple perspectives.



Share Best Practices

Share resources or models others have created for the purpose of replicating outcomes.

Key Benefits:
Ease/Efficiency/Security



Share Process (& Failures)

Highlight and share failures as well as successes for the purpose of replicating the test.

Key Benefits:
Risk-taking/Innovation

Teacher Benefit

Confidence in something that "works"

Clear exemplars to emulate (security and efficiency)

Does not require starting from square one

Connection to those who are sharing their practices

Avoid repeating others' mistakes

Feeling of being respected ("I'm being given the whole story")

Psychological safety to take risks

Choose from rich (not distilled) pool of information

School Leader Benefit

Opportunities for school to receive visits from other educators/pride, celebration of teachers.

Higher efficiency of adoption throughout school

Simplifies process and save time by relying on others' examples

Less teacher skepticism when the entire process is evident

Specific, "nuts and bolts" information enables more effective decision-making

Enables new ideas and new approaches

District/CMO Benefit

Protects system leader's reputation as promoting high value practices

Easier to communicate internal work to external partners

Simplifies adoption at scale

Cultivates a learning orientation throughout the system

Encourages meaningful teacher communities

Can understand the thinking of other leaders, not just outcomes they produced

Why Combine Approaches?

The following example illustrates the benefits of sharing both successes and process/failures.

“Schools can not only track their development, but they can also hone their understanding of personalized learning.”

Kimberly Richards

Collecting School-Level Data to Create Feedback Loops

Data is useful for student development, but it is also useful information for school and district development. In Fulton County Schools, GA, district leaders Heather Van Looy and Kimberly Richards launched a survey of school practices that helped them understand 1) what teachers were doing in their classrooms, 2) whether or not they needed professional development in a range of areas, and 3) what challenges were standing in the way of progress. They paired this with a student engagement survey to understand their students' perspectives. This data, combined with data collected during school visits, was used to build a live, interactive district dashboard that schools are using to measure their progress. Engaging with various components of the dashboard has also served to clarify their understanding of personalized learning.

Taking it further



Lessons Learned

1. Because contexts vary so widely, it is hard to define what a “best practice” really is. Sharing how a practice evolved, and what it intended to accomplish, in addition to the practice itself, enables more rigorous adoption and adaptation by others.
2. The notion of a “best practice” can be calming and can also offer a safe entry-point to experimentation. If a teacher or a school leader is unsure of how to proceed, following a well-worn path can reduce anxiety. At the same time, it can also cause practitioners to overlook factors in their own context that the practice does not address or match. As a leader, one of the most important roles you can play is to provide enough support and cover for school leaders and teachers that they can genuinely experiment without constantly fearing failure.



Reflection Questions

- How often do people in your system share their failures or the process they engaged in to reach a particular practice? If this is rare, why is it rare?
- What can you do as a leader to invite teachers and school leaders to share what DOESN'T work more regularly? What cover can you provide that is currently not there?
- To what extent does your own behavior model a philosophy of continuous learning?





Survey Data

While these seven questions came up consistently in interviews with system leaders across the country, our team was interested in validating them more rigorously. To this end, we developed a survey tool asking system leaders to share their own views on each question. Nearly 100 respondents from more than 60 systems across the country replied.

In addition to gathering basic data on the respondents and the nature of their efforts (including the type of system they worked in, how far along they were in their own processes, etc.), the survey asked leaders to provide their take on each of the seven questions in two ways:

- 1. Rating of their “current state.”** Leaders were asked to rate where their system lies on a 1-5 Likert scale for each question, with “1” and “5” being the far ends of each, and “3” being an equal mix of the two. We also asked if the system had devoted resources to answering the question.
- 2. Prioritization.** Leaders were asked to look across all seven areas and choose the two to three they felt were most important for leaders to explicitly think through.

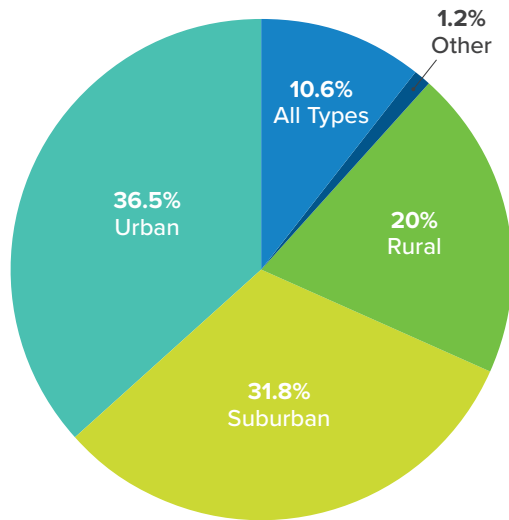
Overview of Respondents

Quick Facts:

- 89 leaders from 60 systems across the country completed the survey
- Majority from public school districts (ranging from 1 school to 600 in a mix of rural, suburban, and urban settings)
- Majority with high percentages of children qualifying for free and reduced lunch (a proxy for family income)

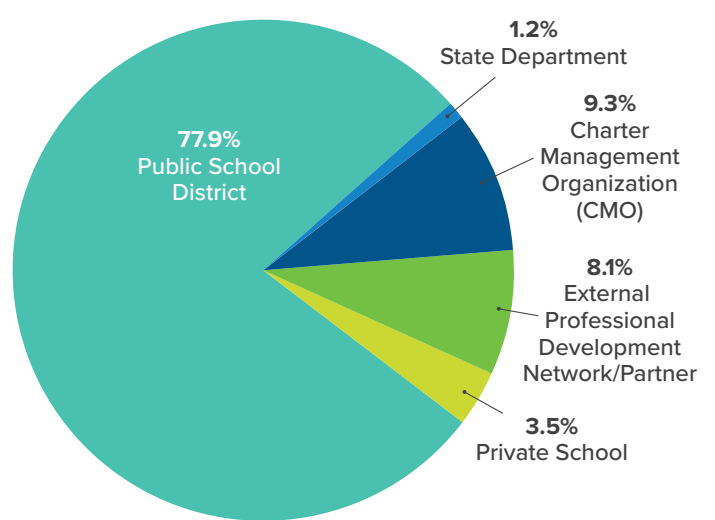
Respondents by Schools Served

(n=86)



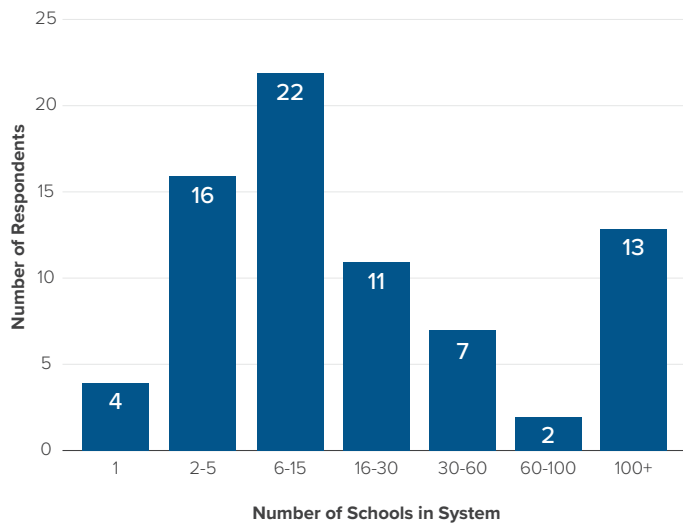
Respondents by System

(n=85)



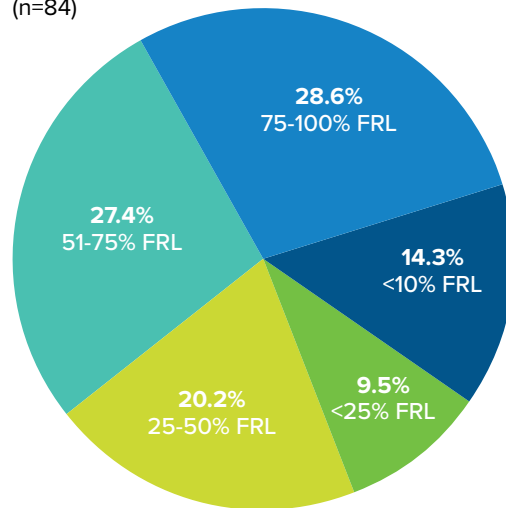
Respondents by System Size

(n=75; non-district respondents excluded)



Respondents by Percent Students Qualifying for Free-and-Reduced Lunch

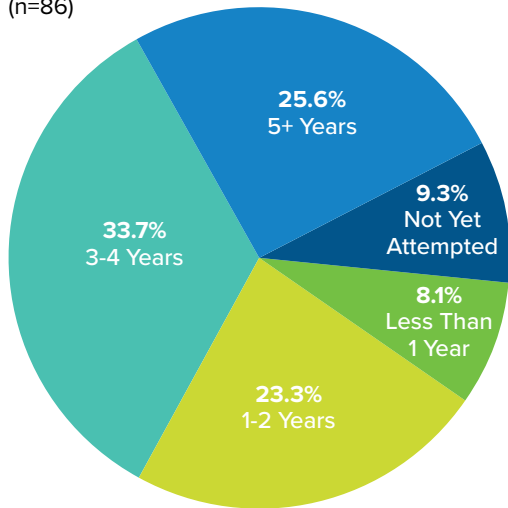
(n=84)



Respondents varied across stage of implementation, though most were several years into scaling blended and personalized learning practices across their systems.

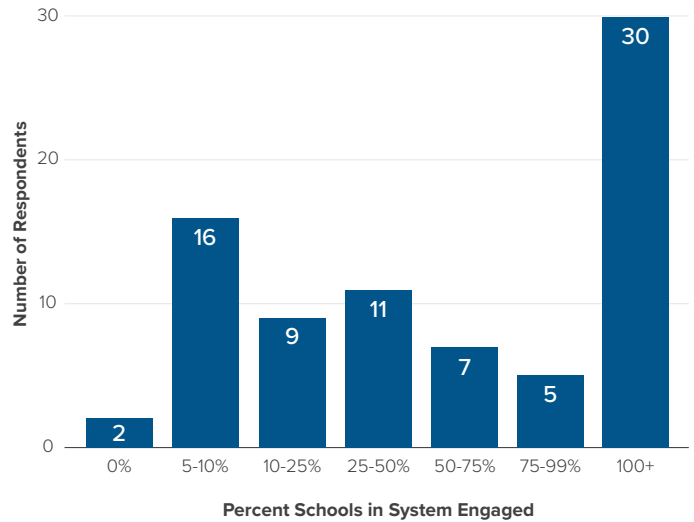
Respondents by Stage of Implementation: Years Scaling

(n=86)



Respondents by System Penetration: Percent Schools Engaged

(n=80; non-district respondents excluded)

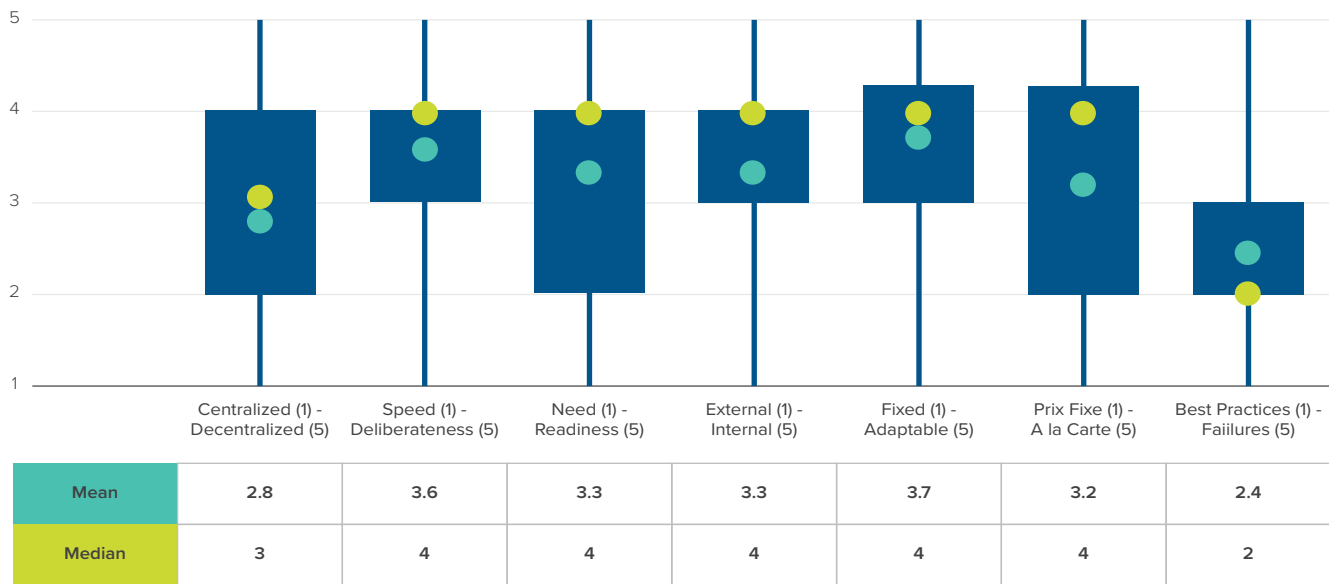


Overall Findings

Quick Facts:

- An overwhelming majority of leaders have dedicated time and resources to solving each of the seven challenges
- Systems fall across all points along the spectrum
- For some questions, systems cluster tightly while for others ratings are more widely spread

Survey Participant Rating of Own School System’s Position on Priority Dimension



Across the board, leaders reinforced interview findings. Each of the seven areas were indicated as challenge areas (with 80–90% of leaders reporting each as an area to which they have devoted resources) or a top priority (even the questions that fell lowest on the list of prioritization was still regarded as most relevant by over a quarter of systems).

Leader responses revealed wide variance in terms of where systems rate themselves along the seven spectrums; all questions had some systems rating themselves as either a “1” or a “5.” The table above shows a “boxplot” of ratings for each dimension. The blue line in each represents the overall range (again, all ranged from “1” to “5”). The blue box shows the range for the middle half of respondents, with dots representing the mean and median responses.

In some cases, systems had similar responses; overall, systems reported being more deliberate and adaptive in approach. They also reported a greater focus on building internal systems and supports rather than bringing in external partners. Systems also overwhelmingly focused on identifying and sharing “best practices” rather than on sharing processes and learnings from failures.

In other cases, systems were much more heterogeneous (or diverse). Districts ranged significantly in terms of how centralized they were, how much they prioritized need versus readiness, and in the approach they took to offering services to schools.

Findings by Each Question Area:

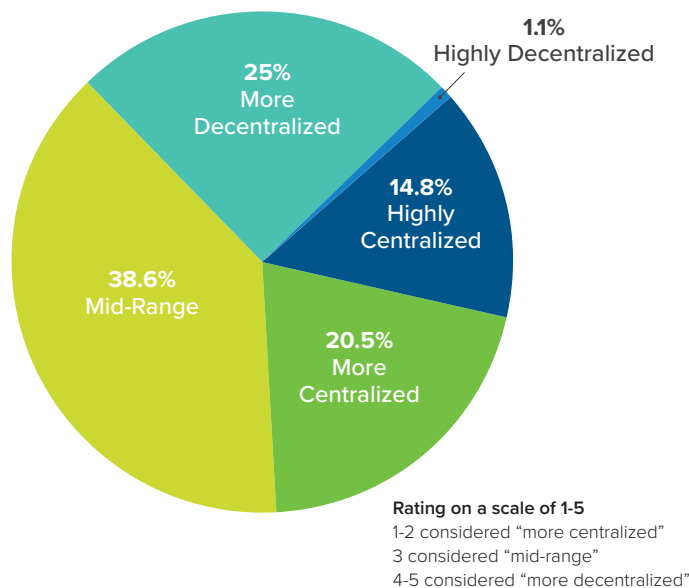
Centralized vs. Decentralized Implementation

Quick Facts:

- Districts vary widely in terms of how centralized their blended learning implementation has been
- Some types of systems were more likely to centralize their implementation than others
- Larger systems prioritize this question more actively, with the exception of very large systems (100 schools or more) who rate it as low priority

Centralization vs. Decentralization

(n=86)



Participant rating

The median system rating was a 3 on a scale of 1–5, with “1” being more centralized and “5” being more decentralized. The average rating was 2.8, meaning that more districts reported utilizing a highly centralized implementation process than a highly decentralized one.

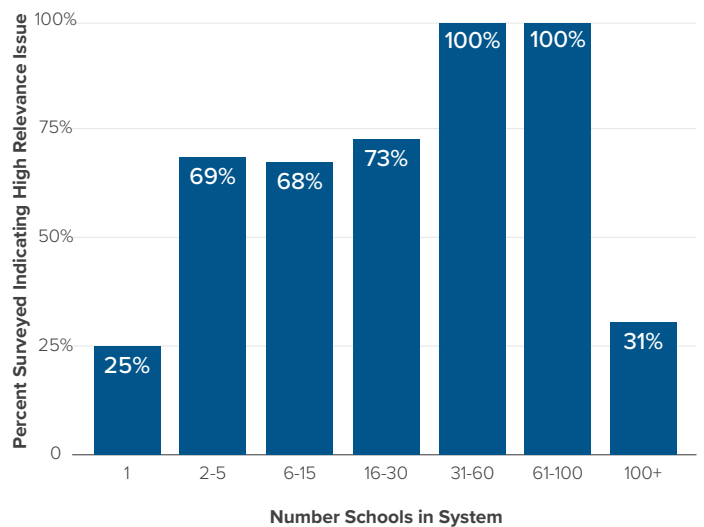
There were some patterns based on system characteristics. The following types of systems were more likely to report centralized approaches:

- Serving diverse range of geographies (suburban, urban, and/or rural)
- Early in the process of scaling (10–25% of schools engaged) or fewer years in process
- Larger systems (60–100 schools)
- Lower income schools districts (75–100% FRL)

While small in number (three), all private schools reported being decentralized, rating themselves 4 on the 5-point scale.

Respondents Stating Centralization vs. Decentralization Priority Issue

(n=86)



Reported dedication of time or resources to this challenge

87% of respondents reported that they had devoted resources to answering this question. CMOs were more likely than other respondents to report affirmatively; 100% reported devoting resources. Further, systems serving greater numbers of students qualifying for free-and-reduced lunch (FRL) were more likely to report focusing here than systems serving low numbers (92% versus 75%).

Reported relevance of challenge

This was the question most frequently described as highly relevant, with 58% of systems citing it as a top issue of focus. The relevance of this issue heightens as districts grow in size, that is until they are over 100 schools. These systems are amongst those rated as being most centralized, and it's possible that decentralization is less of a relevant issue to think through given these districts have already made a choice.

Findings by Each Question Area:

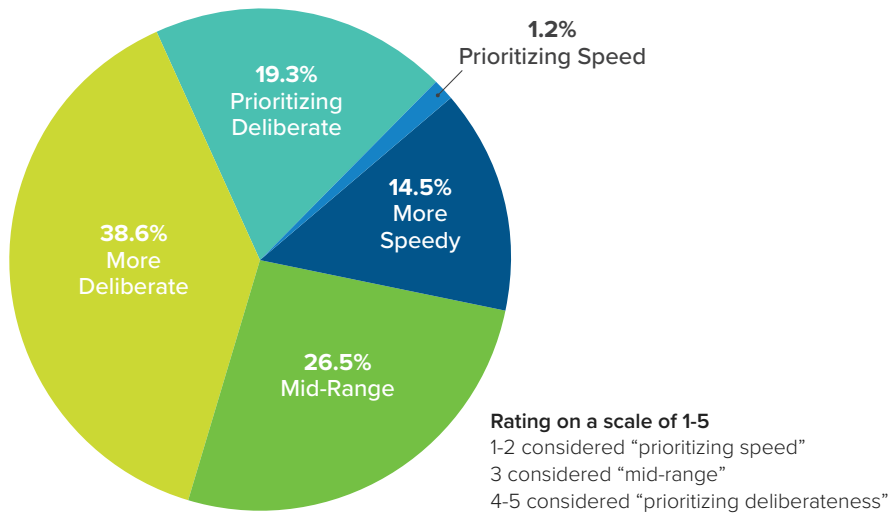
“Fast and Furious” vs. “Slow and Steady”

Quick Facts:

- In general, systems say they prioritize “deliberateness” over “speed”
- Systems early in their implementation process are more likely to dedicate time and resources to this challenge than those in later stages
- 45% of respondents rated this as a “high priority” challenge

Prioritize Speed vs. Prioritize Deliberateness

(n=86)



Participant rating

The median system rating was a 4 on a scale of 1 to 5, with “1” prioritizing speed and “5” prioritizing deliberateness. The average rating was 3.6; 58% of respondents rated their district as “deliberate,” with 19% rating themselves on the most extreme end. Conversely, only 1% rated themselves on the extreme side of “speedy.” Systems earlier in their scaling process, those beginning the work in terms of years as well as in percent of schools in their districts involved, reported being more deliberate than those later in the process. The median response for districts just starting was a “5” (very deliberate); this score dropped towards the mid-range as districts reached greater scale or later stages.

Reported devotion of time or resources to this challenge

88% of respondents reported that they had devoted resources to answering this question. Larger school systems were more likely than smaller ones to focus here.

Reported relevance of challenge

Navigating the trade-off between speed and deliberateness was cited as a top-priority challenge by 45% of participants. Rural systems reported greater relevance than other types of systems.

Findings by Each Question Area:

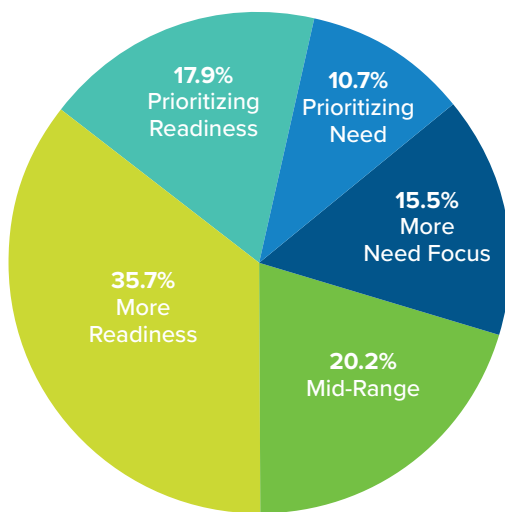
Prioritize Need vs. Prioritize Readiness

Quick Facts:

- 54% of respondents reported a focus on readiness, while only 26% claimed to focus more on need
- Large and urban districts are more likely to prioritize need, while those serving small populations of students who qualify for free-and-reduced lunch are more likely to focus on readiness

Prioritize Need vs. Prioritize Readiness

(n=86)



Rating on a scale of 1-5

1-2 considered "prioritizing need"

3 considered "mid-range"

4-5 considered "prioritizing readiness"

Participant rating

The median system rating was a 4 on a scale of 1 to 5, with "1" prioritizing need and "5" prioritizing readiness. The average rating was 3.3. Systems more likely to prioritize need include urban districts and systems with over 100 schools. Conversely, systems serving a smaller population of free-and-reduced lunch students (<10%) and those early in the process of scaling are more likely to focus on readiness.

Reported relevance of challenge

Navigating the trade-off between school need and readiness was cited as a top-priority challenge by 52% of participants. Systems serving larger percentages of free free-and-reduced lunch students (>50–99%) were over twice as likely to cite this as a relevant issue.

Reported devotion of time or resources to this challenge

86% of respondents reported that they'd devoted resources to answering this question.

Findings by Each Question Area:

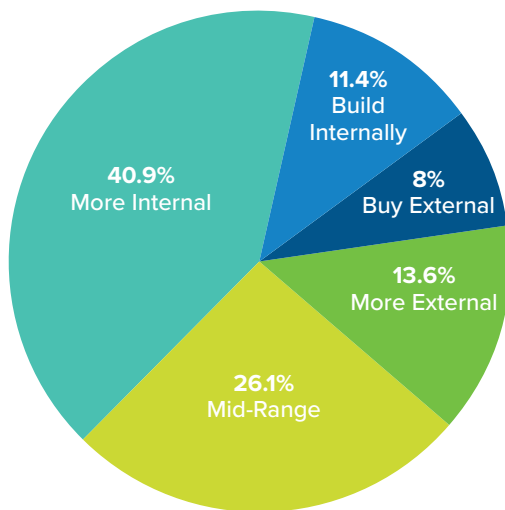
Build Internally vs. Buy Externally

Quick Facts:

- 52% of respondents claimed to prioritize internal capacity building, while 22% leaned towards external support
- Districts serving high-income populations reported this question as highly relevant (and also make up a larger number of those who rate themselves as leaning towards external support)
- Districts serving low-income populations make up a larger percent of those focused on internal capacity building.

Build Internally vs. Buy Externally

(n=86)



Rating on a scale of 1-5

1-2 considered "buying externally"

3 considered "mid-range"

4-5 considered "building internally"

Participant rating

The median system rating was a 4 on a scale of 1 to 5, with "1" focusing on building internal capacity and "5" leaning towards external supports and resources. The average rating was 3.3. Systems earlier in scaling implementation are more likely to report "buying" external services. Those ranking themselves as "highly external" are more likely to be in wealthier districts, while a majority of those ranking themselves as focused on internal capacity building serve higher numbers of low-income families. We speculate that this may simply be a function of which districts have money to spend on external resources.

Reported devotion of time or resources to this challenge

86% of respondents reported that they'd devoted resources to 90% of respondents reported that they'd devoted resources to answering this question.

Reported relevance of challenge

Navigating the trade-off between building internal versus purchasing external supports was cited as a top-priority challenge by 45% of participants. Districts serving high-income populations report that this issue is of high relevance for their work.

Findings by Each Question Area:

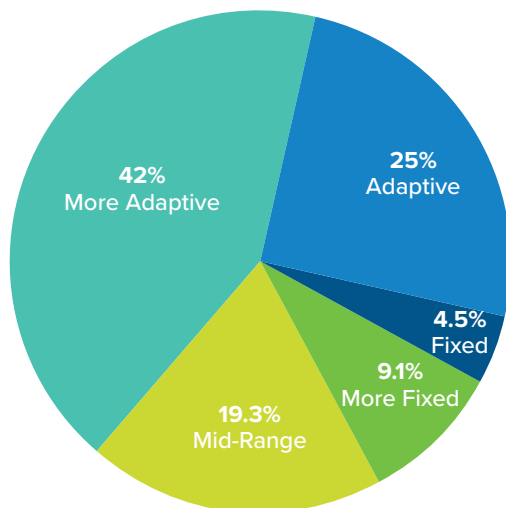
Fixed Strategy vs. Adapt with Experience

Quick Facts:

- 67% of respondents reported to implement using an adaptive strategy while 14% claimed to have more fixed strategies
- While 88% of respondents had dedicated time and resources to this challenge, only 22% named this as a high priority issue

Fixed Strategy vs. Adapt with Experience

(n=86)



Rating on a scale of 1-5

1-2 considered “more fixed approach”

3 considered “mid-range”

4-5 considered “more adaptive approach”

Participant rating

The median system rating was a 4 on a scale of 1 to 5, with “1” using a fixed strategy and “5” reportedly using an adaptive one. The average rating was 3.7. Urban districts were the most likely ones to rate themselves as either highly fixed or highly adaptive (all the “strongly fixed” responses came from urban districts). CMOs tended to rate themselves as leaning towards adaptive strategies. Finally, 3 out of 4 “strongly fixed” responses were from systems early on in their scaling process, while 13 out of 20 “strongly deliberate” responses came from systems 3+ years into scaling.

Reported devotion of time or resources to this challenge

88% of respondents reported that they’d devoted resources to answering this question.

Reported relevance of challenge

Navigating the trade-off between pursuing a fixed versus more adaptive strategy was cited as a top-priority challenge by 22% of participants.

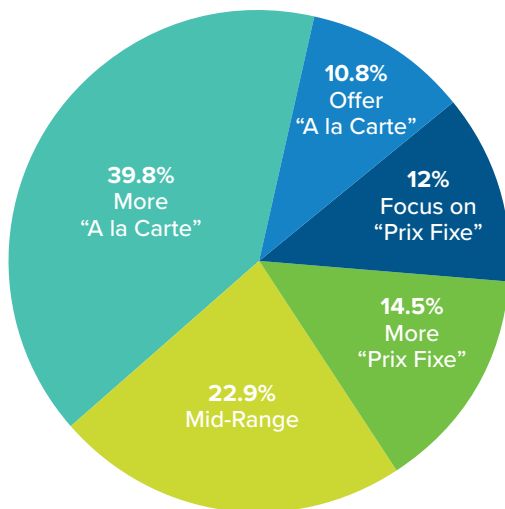
Findings by Each Question Area: “Prix Fixe” vs. “A la Carte”

Quick Facts:

- 51% of respondents favor an “A la Carte” model, while 27% favor “Prix Fixe”
- Larger systems (those with 60 or more schools) report using a more “Prix Fixe” approach as do those farther along in their scaling process

“Prix Fixe” vs. “A la Carte”

(n=86)



Rating on a scale of 1-5

1-2 considered “focus on prix fixe”

3 considered “mid-range”

4-5 considered “offering a la carte”

Participant rating

The median system rating was a 4 on a scale of 1 to 5, with “1” using a “Prix Fixe” approach and “5” reportedly offering an “A la Carte” services. The average rating was 3.2. Larger systems (those with 60 or more schools) report using a more “Prix Fixe” approach as do those farther along in their scaling process (e.g., have been scaling for more years).

Reported devotion of time or resources to this challenge

90% of respondents reported that they’d devoted resources to answering this question.

Reported relevance of challenge

Navigating the service model trade-offs was cited as a top-priority challenge by 38% of participants.

Findings by Each Question Area:

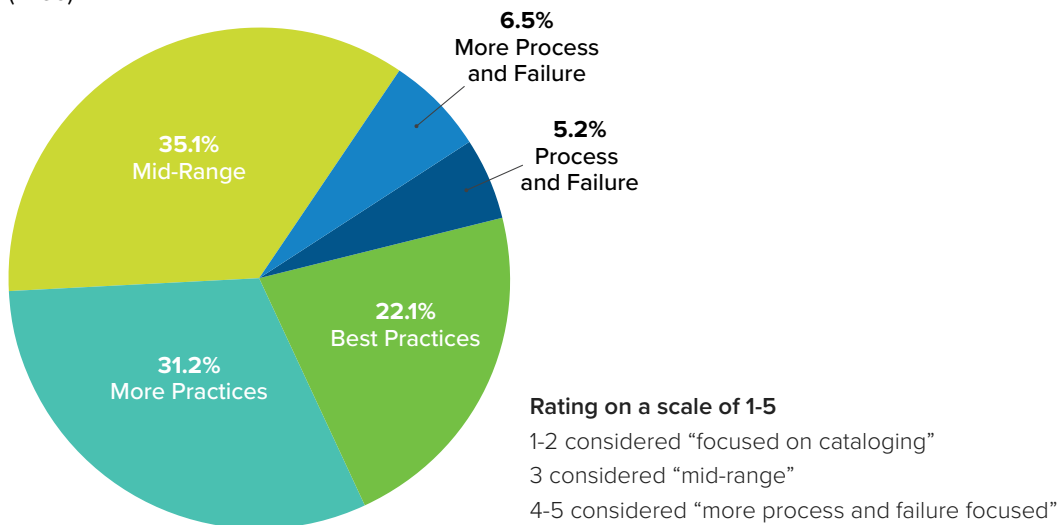
Share Best Practices vs. Share Process/Failures

Quick Facts:

- Systems overwhelmingly lean toward sharing “best practices;” only 12% said they leaned towards sharing failures or their processes (and these were largely private schools and single-site entities)
- This was the lowest rated question in terms of districts investing time and resources, and only 28% rated it as a “high priority” challenge

Share Best Practices vs. Share Process/Failures

(n=86)



Participant rating

The median system rating was a 2 on a scale of 1 to 5, with “1” focusing on identifying, codifying, and communicating best practices and “5” reportedly focusing on sharing processes and failures. The average rating was 2.4. The only systems to cite focusing on sharing process and failure findings are private schools and single-site entities.

Reported devotion of time or resources to this challenge

81% of respondents reported that they’d devoted resources to answering this question. While still a high percentage of respondents, this is significantly lower than in other question areas.

Suburban schools were less likely to respond affirmatively than other school types (70% versus 87% for urban systems, 94% for rural systems, and 100% for systems serving all types of schools).

Reported relevance of challenge

Navigating the trade-off between sharing best practices versus process and failures was cited as a top-priority challenge by 28% of participants. Rural and suburban schools are more likely to report this as a priority area.



Reflection Guides

One of the biggest mistakes leaders say they made when they began their scaling processes was to jump to tactical planning before taking the time to define their strategic values and objectives. Michael Fauteax, director of innovation for Leadership Public Schools explains, “Context matters, culture matters, and resources matter. We should have asked, ‘Based on our context and values, etc. what should we look to personalize and what should we not?’” We’ve created two reflection guides to help leaders early in their blended or personalized implementation process step back to consider some of these questions.

Reflection Guide 1:

Laying the Foundation

Rebecca Midles, executive director of teaching and learning in Mesa Valley District 51, highlights the importance of not only level setting on current conditions and goals, but making sure leadership teams have considered what foundational knowledge and/or skills administrators and teachers will need to have in order to implement successfully: “One of the biggest mistakes I see district leaders make,” she says, “is jumping into visioning sessions around blended and personalized learning too quickly, without building background knowledge. Teams just end up sharing out words, but they don’t link to anything tangible.” Similarly, John Rice, former director of education technology for DC Public Schools remarked in our interview, “We were focused on what we could get into people’s hands, but didn’t think enough about how blended learning tied in with the district priorities, rather than as a stand-alone priority. If I could go back and do anything differently, I would have made sure to explain how blended learning was integral to instruction, not a different kind of instruction.”

Before looking at tactical implementation decisions, take the time to reflect on both your context and your objectives.

Here are three categories of questions that can help you ground your thinking:



Driving Values

1. What values do you want to guide your implementation process? Why?
2. What does it look like to operationalize those values? (What do they look like in action?)
3. What factors might impede putting those values into action? How might you mitigate against them?
4. What factors might aid putting those values into action? How might you leverage them?

Context, Culture, & Climate

1. Where do your driving values show up in your system? Where do they not? Why?
2. How would you describe the current climate of your district/organization? What factors have contributed?
3. How are decisions made within your district/organization? Where does equity and access fit into that process? Whose

engagement and/or buy-in do you need in order to succeed?

4. What is the relevant content expertise that your team has and needs in order to successfully implement this plan? What do you need to know before being able to create a vision for blended or personalized learning in your system?

Desired Outcomes

1. What are the key outcomes you want for your students? What skills or knowledge are you hoping this process will help students develop? Be very specific here. For example, if you care about student agency, make sure you are clear about precisely what student agency means. How would you know it had improved? How might you measure that?
2. Why are these outcomes important? What do you believe will change for students, teachers and the district/organization as a whole if they were achieved?

Reflection Guide 2:

Charting Your Path

Use the questions below to help you reflect on both the current state of your implementation pathway and also your future aspirations as a system.



Where does your system lie across these dimensions? Mark the place along the spectrum that best describes your current state for each. Then connect a line through them to create a “pathway.”

Centralized Decentralized < Locus of Control
“Fast and Furious” “Slow and Steady” < Pace
Prioritize Need Prioritize Readiness < Resource Allocation
Buy/Partner Externally Build Internally < Cultivating Capacity
Fixed Strategy Adaptive Strategy < Strategic Flexibility
“Prix Fixe” “A la Carte” < Comprehensiveness
Share Best Practices Share Process and Failures < Sharing Learning

1. What do you notice about your system’s current pathway? Does anything surprise you? Do you perceive any patterns of significance?
2. In a different color, mark an aspirational spot along each spectrum that shows where you’d like your system to be and connect them to draw a new pathway.
3. Where is the gap between your “current state” and “desired state” the widest or, from your perspective, the most critical? Why? What are the implications for your system?



Repeat this exercise with your team and/or ask some others in your system (preferably in different kinds of roles with different levels or types of authority) to engage in the exercise. Look at them together:

1. Where are people the most aligned? The least? What accounts for the similarities and differences? If you are unsure, how could you find out?
2. Are there patterns to be found between the different pathways people have drawn? What are the implications for your district or system?



Think back to the visual below from “[Laying the Foundation](#)”

1. In what ways does your current pathway (or strategy) support your desired outcomes?
2. Where does it depart from them?
3. Which differences matter the most? Why?



Find [writeable versions](#) of these two guides, as well as all of the reflection questions that appear throughout the report.





About the Authors

Ellie Avishai is a partner at The Learning Accelerator. She is formerly the founder and director of I-Think, a K-12 initiative at the Rotman School of Management (University of Toronto), that teaches students, teachers, and district and school leaders methods for critical and creative problem-solving. Ellie recently completed her doctorate in education leadership (Ed.L.D.) from Harvard University.

Beth Rabbitt is chief executive officer of The Learning Accelerator. A founding partner of the organization and systems entrepreneur, she is a nationally recognized expert in new models for student and adult learning. Beth earned her doctorate in education leadership (Ed.L.D.) from Harvard University.

Thank you!

This paper could not have been written without the help and contributions of many members of the TLA team, including: Juliana Finegan, Saro Mohammed, Daniel Owens, Stephen Pham, Nithi Thomas, and Samantha Brumley. A special thanks to Kira Keane, who kept us focused and moving forward. Thank you to the many system leaders who spent time talking with us honestly and thoughtfully about their work, particularly to Michael Fauteux, Jin-Soo Huh, Karen Perry, Stephanie Downey-Toledo, and Deborah Hirsch, who gave us early feedback on this work. A final note of thanks to Roger Martin for the idea to explore the benefits behind tensions as a source of generative thinking.

The Learning Accelerator

The Learning Accelerator is a national nonprofit that believes each child in America must have an effective, equitable, and engaging education that is personalized, informed by data, and mastery-based. Blended learning is a key mechanism for making this vision possible for every child, in every school, throughout the country. The Learning Accelerator works to address the common challenges educators and school systems face in implementing blended and personalized learning at scale.

Learn more

www.learningaccelerator.org

info@learningaccelerator.org

 [@LearningAccel](https://twitter.com/LearningAccel)

 [@LearningAccelerator](https://www.facebook.com/LearningAccelerator)

Web Version

You can find this report, and modular versions of each of the questions [on our website](#).

Please Share!

Did you find the information in this paper helpful? Do you have colleagues or a network that might benefit from our work? Please share by sending them the paper, or post it on social media.

This work has been developed under a Creative Commons CCBY 4 license, so free to share and use with attribution.





June 2018

This work is licensed under a
[Creative Commons Attribution 4.0
International License](https://creativecommons.org/licenses/by/4.0/)

