

# Facilitator's Guidelines

Facilitator's guidelines are provided to enable schools to conduct this workshop on their own. If you prefer to have assistance with facilitation, or have any questions about the workshop, please contact Joe DiMartino, director of the Secondary School Redesign program of The Education Alliance at Brown University, 800-521-9550 ext. 235.

Time	Activity & Description	Materials
WORKSHOP TOTAL HOURS: 10+	<b>Preplanning with Participating Teams:</b> The workshop activities included in the guide would take more than ten hours of workshop time, at a minimum. Consequently, it will be important to design a series of activities that fit the needs and hopes of the people who will attend. Teams just beginning to personalize their schools may want to focus on purpose and content. Teams at a later stage may want to concentrate on a specific program component and the assessment process. The activities are designed to be flexible, but they are also sequential. As you select a series of steps for your workshop, you will also need to include the explanation of how you have designed the time.	<b>Workshop Guidebook</b>  <b>Chart paper &amp; markers</b>
15 minutes	<b>Introductions: Personalized Learning–Hopes for the Day</b> Briefly introduce the purpose of the workshop: to prepare high school teams to introduce a plan for personalized learning in their high schools. To help focus the workshop, ask each individual to introduce her or himself with a brief explanation of hopes or desires for the day. If teams have already been formed, ask each team to assemble a collective version of hopes for the day.  Facilitators may create ground rules as they choose. One approach would be to create a cluster map or “mind map” on the board, with Personalized Learning in the center circle. Then, arrange team purposes in surrounding circles until all team (or individual) purposes are represented. The cluster map of hopes can allow the facilitators to talk about the scope of the workshop in relation to different kinds of team purpose, stressing the need for adaptation to the needs of schools or people.	<b>Cluster map on newsprint</b>
5 minutes	<b>Overview: Developing a Proposal for Personalized Learning</b> This workshop is designed to help individuals, schools, or teams develop a proposal for a personalized learning project or program within their school. Explain the five parts of the workshop (p. 9-11) and how they will help teams or individuals design a strong proposal for a particular approach to personalized learning in their schools: purpose, organization, content and process, assessment, and leadership.	<b>Workshop Guidebook</b>

# Getting Started: Continued

Time	Activity & Description	Materials
5 minutes	<p><b>Overview, continued</b></p> <p><i>Purpose:</i> a collective rationale for a personalized approach</p> <p><i>Organization:</i> an explanation of how the new program fits within school structure</p> <p><i>Content and Process:</i> materials that show how the program will work and what it will include</p> <p><i>Assessment:</i> a description of outcomes and how they will be assessed</p> <p><i>Leadership:</i> a description of roles individuals will take in moving the idea forward</p> <p>This workshop has been organized based on an inquiry method of learning—it is about asking questions and collectively exploring possible answers to those questions. The success of this workshop and each individual's experience here depends upon participants' willingness to ask questions, share ideas, and be reflective. The success of personalized learning really depends on tailoring the program to the community in which it will exist.</p>	<b>Workshop Guidebook</b>
20 minutes (option)	<p><b>Discussion: What is personalized learning?</b></p> <p>Ask individuals to scan the introductory pages on Personalized Learning and to select one quotation that seems to reflect the purpose they brought to the workshop (p. 13-20). Ask individuals to read the quotation they have selected and connect them to their purpose. Continue discussing quotations and connections until a full picture of personalized learning has come into view. Attaching key words to the original cluster map can help make the connection between purposes and the character of personalized learning.</p>	<b>Workshop Guidebook</b>

# Key Dimension #1: PURPOSE

Time	Activity & Description	Materials
5 minutes	<p><b>Key Dimension #1: Purpose</b></p> <p>Begin this segment by explaining how shared purpose within any team or school becomes the essential ingredient for success in program development. High schools are commonly organized around differences: subject area, grade level, and building geography, for example. Structuring high schools around differences often obscures the shared purpose that makes any group work successfully. Key Dimension #1 aims to help a team discover its shared vision for student learning to guide program design and the project proposal.</p>	
30 minutes	<p><b>Protocol #1: Assembling a Shared Vision for High School Learning</b></p> <p>With Protocol #1 in view, ask individuals to “freewrite” for three minutes about their vision for student learning in their school. You can use the following lead-line to make sure people write ideas that are roughly comparable:</p> <p>My high school is a place where students _____</p> <p>After the freewrite, ask individuals to form groups or teams. Then, ask people within their teams to form groups of two. Each person should read what he or she has written. The groups of two should write down words or phrases that represent shared beliefs about student learning. After ten minutes, ask groups of two to read their lists of shared beliefs to the whole team, while a recorder lists them on a sheet of large newsprint. From the list of beliefs, the recorder or group facilitator can write down ideas that are common to all the groups of two, adapting the language as necessary. In the final phase, group deliberation, rather than the original lists, should guide the team toward consensus. The graphic guide on p.25 can help the facilitator separate individual beliefs from consensual beliefs.</p> <p>Vision statement: Ask a volunteer from each group to write a paragraph from the final list of beliefs.</p>	<p><b>Newsprint</b></p> <p><b>Protocol #1</b></p>
20 minutes	<p><b>Protocol #2: Sorting and Ranking Priorities</b></p> <p>Explain how different approaches to personalized learning serve different purposes. Setting priorities for a personalized learning program involves focusing effort on a relatively narrow band of purposes that will then guide the team through program (continued)</p>	<p><b>Protocol #2</b></p>

# Key Dimension #1: Continued

Time	Activity & Description	Materials
20 minutes	<p><b>Protocol #2, continued</b></p> <p>design. As explained in Protocol #2, you can ask individuals to select 10 priorities from the list. Then, each team should deliberate to define a list of ten or fewer priorities it would like its program to serve. Finally, with their ten priorities in view, team members can try associating each priority with one of the three main strategies for personalized learning, PLPs, portfolios, or student presentations. The distribution of priorities in the three columns can help the team decide how to focus its effort.</p>	<p><b>Protocol #2</b></p>
20 minutes (option)	<p><b>Protocol #3: Using NASSP <i>Breaking Ranks</i>™ Recommendations to Reflect and Revise</b></p> <p>Sometimes, an external perspective can help a team adjust its aim to fit the situation faced at home. Protocol #3 asks the team members to compare the importance of different approaches to personalization to their understanding of current practices in their school. Each individual should score the school for both “importance” and “current practice,” then estimate average scores for the whole team. In general, large gaps between “importance” and “current practice” indicate a high priority need.</p> <p>Ask the team members to reflect on the gaps in their scores to see whether adjusting the priority list from Protocol #2 might focus the team more directly on school needs.</p>	<p><b>Fresh copy of NASSP Recommendations</b></p> <p><b>Protocol #3</b></p>
20 minutes	<p><b>Going Public #1: Asserting a Purpose for Personalized Learning</b></p> <p>Each team should now have the essential elements of a purpose statement: a vision for student learning, a list of priorities for program development in three (or fewer) categories, and a rough estimate of the need at their school. A courageous scribe can write up a purpose statement including all three elements.</p> <p>Asking the team to present its purpose statement to the whole group can clarify communication issues and help with final revision.</p> <p>Ask each team to read the purpose statement to the group. Then, seek:</p> <p>Warm feedback: passages that seemed clear and powerful Misty feedback: parts that seemed confusing or contradictory</p>	<p><b>Newsprint</b></p> <p><b>Going Public #1 Worksheet</b></p>

# Key Dimension #2: ORGANIZATION

Time	Activity & Description	Materials
10 minutes	<p><b>Key Dimension #2: Organizing a Personalized Learning Project</b></p> <p>Explain that the purpose of organization is to place the program they are building into a school organization that is already fully committed to ongoing activity.</p> <p>Participants may comment that the program they develop should dictate the structure they design to sustain it. That's true. Working on organization at this point, however, can give them a sense of how their ideas fit with existing structures in their school—and who they will have to engage in order to make the project work. Let the group know that they may find themselves adjusting their purpose based on what they discover about organization. The same kind of revision may be necessary as they start program design and then discover they have missed an important part of the school organization.</p> <p>This section of the workshop asks participants to think about how their new program will connect to the rest of the school organization. In addition, it raises the question of size. Will the program be large enough to change school culture? Will it be small enough to protect itself from criticism? In general, smaller programs are easier to institute but less effective in changing the student experience in significant ways. Starting small but aiming large depends on understanding how the school accommodates change.</p> <p><b>Overview:</b> Tell participants that they can begin to organize their program by figuring out where in the school organization they can find natural allies and where they may find resistance. They can locate their program center in a place that offers support and protection, hopefully close to the mainstream of school life. Then, they can look at the remainder of the school to develop strategies that will engage others in the life of their program. Finally, the teams will distribute parts of the task of introducing the program and gaining acceptance throughout the whole system.</p>	<p><b>Workshop Guidebook</b></p>
30 minutes (option)	<p><b>Protocol #4: Environmental Scan: Looking for Constraints and Opportunities</b></p> <p>New programs destabilize existing programs even when distantly connected. Protocol #4 asks teams to list areas of school life in which reaction is predictable. Then, the team should discuss and list the concerns themselves. Will the project affect homework? Bus schedules? Students in the library? Class absences? Class length? (continued)</p>	<p><b>Newsprint</b></p> <p><b>Protocol #4</b></p>

# Key Dimension #2: Continued

Time	Activity & Description	Materials
30 minutes	<p><b>Protocol #4, continued</b></p> <p>Not all concerns can be identified before the program is fully designed, but a provisional list can help the team see how its work will affect others. In a short discussion following Protocol #4, ask a few team members to explain the main concerns they faced and the steps they considered to engage others.</p>	<b>Protocol #4</b>
20 minutes	<p><b>Protocol #5: Adapting Systems to Allow Growth</b></p> <p>Protocol #5 extends the challenge of the environmental scan to the whole school organization. The protocol also asks teams to think about short and long-term strategies they can use to engage people scattered across the system. A short-term strategy step might be to call a meeting, visit an influential member of the community, or write a program overview. Longer-term strategies might include forming a steering group, seeking space, or writing a proposal to the school board. Again, you can remind the teams that their list of strategies may not be complete at this time, and that other ideas will be added during program design, assessment and leadership discussions.</p> <p>In general, it may be useful to let teams know that the five areas of school life identified in the chart are all important to program success—and that resistance at any level can shut down the process of growth.</p>	<b>Protocol #5</b>
20 minutes (option)	<p><b>Going Public #2: Organizing a Project to Grow</b></p> <p>The summary sheet asks teams to look at their list of tasks in relation to the three personalization strategies that are the focus of the workshop: Personal Learning Plans (PLPs), portfolios, and presentations.</p> <p>Again, teams may have to clarify and adjust their strategy steps in relation to each or any of these components. When teams have finished, you may want to remind them again that their tasks list will continue to grow throughout the workshop.</p>	<b>Going Public #2 Worksheet</b>

# Key Dimension #3:

## CONTENT AND PROCESS

Time	Activity & Description	Materials
15 minutes	<p><b>Key Dimension #3: The Content and Process of Personalized Learning</b></p> <p>The first five pages of this section include quotations from the literature and illustrative diagrams from a Vermont high school. All of them are meant to represent personalized learning as one process with three major purposes:</p> <ol style="list-style-type: none"><li>1) Self awareness: what the student learns about his or her own values, ambitions, talents, knowledge, and special skills;</li><li>2) Explorations: what the student learns about the world he or she is about to enter as an adult;</li><li>3) Confirmation: what the student learns about defining pathways available to the future she or he has begun to imagine.</li></ol> <p>The three purposes can become a recurring cycle throughout the high school years, helping students understand themselves, choose options, and make corrections as they develop an increasingly clear picture of their adult lives.</p>	<b>Workshop Guidebook</b>
30 minutes (option)	<p><b>Protocol #7: Focusing and Defining: Three Options in Personalized Learning</b></p> <p>This protocol introduces the three major components of personalized learning, but only in terms of purpose:</p> <p>Awareness = Personal Learning Plans Exploration = Personal Portfolios Confirmation = Presentations &amp; Assessment</p> <p>Teams should discuss the importance of each to the purpose they have set for their work in Part 1. What aspect of personalized learning do they want to emphasize? What component might receive less emphasis—or none at all? Each team should come up with a primary focus for its work and be able to explain its choice in terms of the purpose it has set. The exercises in this section aim to clarify choices and give team members a foundation for program design.</p>	<b>Protocol #7</b>

# Key Dimension #3: Continued

Time	Activity & Description	Materials
10 minutes	<b>Self Awareness and Purpose Through Personal Learning Plans (PLPs)</b> The three paragraphs that introduce this section can serve to introduce PLPs as an option, either as recommendations (NASSP) or as successful practice (Deborah Meier). It may be useful to mention that PLPs create pressure in high schools toward increased independent learning through internships, self-directed study, and special projects. Also, emphasize that the protocol that follows is an experiment, designed to give teams part of the experience of developing a PLP.	<b>Workshop Guidebook</b>
20 minutes (option)	<b>Personal Learning Plans</b> <b>Protocol #8: Practicing Mapping: Dialogue and Search for Learning Options</b> There are five mapping exercises included in this section. Rather than asking individuals to complete all the maps, suggest that they include one map or two, just to test the process. The process is designed to help students convert their current awareness (hopes, fears, etc.) into questions that they can explore through coursework, field work, or independent inquiry. For this experiment, ask individuals to find another person with whom they would like to work. Each individual should then complete any of the maps (10 minutes).  When they have finished, “advising” can begin, with five minutes allotted to each partner: the advisee should explain his or her map to the partner advisor; the advisor should take brief notes on aspects of the map that raise questions or issues, working with the advisee to frame each issue as a question (or even a goal to be pursued); for each question that is generated, advisor and advisee can brainstorm learning options that could help the advisee find answers.  Partners may note that some options grant formal credit and some can be answered through experience alone.  Discussion: (Option) What changes might occur in your school if all students were to meet with an advisor each year to discover questions and brainstorm learning opportunities? (See exercise 6)	<b>Protocol #8</b>
10 minutes	<b>Protocol #9: Personal Learning Plans: Sketching a PLP Sequence in the High School Years</b> With a hypothetical structure in view, Protocol #9 asks teams to think about the structure of PLP development over four years. (continued)	<b>Protocol #9</b>

# Key Dimension #3: Continued

Time	Activity & Description	Materials
10 minutes	<p><b>Protocol #9, continued</b></p> <p>If teams are already committed to following a different four-year track or if they are committed to a single year, ask them to sketch the process they would use to guide students through the four stages listed in the left-hand column.</p> <p>As time runs out, ask teams to consider further changes in their organization that are needed to support the decisions they have made.</p>	<b>Protocol #9</b>
5 minutes	<p><b>Portfolios</b></p> <p>Any of the quotations that introduce the section on portfolios can be used to focus this section of the workshop. Reading the dialogue by Tyrone Jones may also communicate the flavor of a school based on portfolio development. It may be important to stress at this point that the portfolio being described in this section is a “best work” or presentation portfolio, a low stakes version that does not base graduation on successful completion. Making portfolios integral to the assessment system, in classes or as whole-school exercises, raises the stakes and increases the need for whole-school adoption and engagement. The focusing question should be:</p> <p><i>How would portfolio development affect personalized learning in your school?</i></p>	
30 minutes	<p><b>Protocol #10: Team Consensus: Issues in Portfolio Planning</b></p> <p>Absolute agreement on all the issues raised in Protocol #9 may not be possible. Instead, the exercise is designed to help teams confront the issues that emerge when students begin collecting evidence of their learning. Each of the questions implies a task for the team to consider. For example, if a common format is desirable, what is that format? Who will design the guide? Who will help students gather and assess work? Even before beginning this protocol, remind the team that its agreements will change the organization it began to envision in Part 2, or even the purpose it asserted in Part 1.</p> <p>Individuals within a team should complete the scales without consulting with their team; a team facilitator should collect the ratings from team members on a fresh copy, so the range of responses is visible; the facilitator should ask individuals above and below the apparent median to talk about their rating and explain (continued)</p>	<b>Protocol #10</b>

# Key Dimension #3: Continued

Time	Activity & Description	Materials
30 minutes	<p><b>Protocol #10, continued</b></p> <p>the concerns; from a general discussion, the team should agree on a number that fairly reflects the consensus of the group.</p> <p>Explain that questions with very high or low ratings may deserve special attention as the group designs its plan. The determination of the group should be clear in its program presentation.</p>	<p><b>Protocol #10</b></p>
20 minutes	<p><b>Protocol #11: Portfolio Content: Seeking Portfolio Artifacts from Academic Courses</b></p> <p>The purpose of this exercise is to help teams review the existing curriculum for assignments, tasks, and projects that already challenge students to meet standards. Existing products may make up a good part of student portfolios. Beyond the list of courses and products, the real test of existing assignments for student work should be the standards the group has selected for assessing the portfolio. Teams may have no clear idea of the standards they might use at this point, but noting standards next to each task will allow them to notice gaps. When groups have completed the exercise, ask them to discuss the gaps they see.</p> <p>How would the team adjust school practice in order to include a larger number of important standards? You can use the sampler from the Mount Abraham Electronic Portfolio to demonstrate how existing courses can generate portfolio artifacts that meet both content and process standards.</p>	<p><b>Protocol #11</b></p> <p><b>Mount Abraham Electronic Portfolio</b></p>
20 minutes	<p><b>Presentations and Exhibitions</b></p> <p>The quotations that lead this section may help to introduce the question of presentation: How would student presentations affect the success of personalized learning at your high school? Explain that presentations change the character of the high school, including the climate and energy. Presentations periodically put student learning directly at the center of life in a school. Unlike exams or papers, they are public events for which each student has personal responsibility. If the content of presentation includes class assignments, teachers must begin to focus their teaching more on projects than information recall. In short, they push a faculty toward authentic assessment, tasks from adult experience that pose complex questions and (continued)</p>	<p><b>Workshop Guidebook</b></p>

# Key Dimension #3: Continued

Time	Activity & Description	Materials
20 minutes	<p><b>Presentations and Exhibitions, continued</b> require multiple sources of information.</p> <p>Often, the task of completing a portfolio, with reflections and introductory essays, helps meet communication standards. Presenting whole portfolios at regular intervals can underscore the progress a student has made within a range of standards.</p>	<b>Workshop Guidebook</b>
20 minutes	<p><b>Protocol #12: Preparing for Student Presentations</b> As you introduce the protocol on presentations, explain that the teams will face a choice as they proceed. Should presentations feature the inquiry students have pursued for their Personal Learning Plans? Should they emphasize the knowledge students have gained from their existing courses? Do they want to focus attention on independent learning from independent studies, internships, or special projects?</p> <p>This protocol is a discussion guide, asking teams to list the kinds of projects students might complete in order to prepare for a quarterly, semester, or yearly presentation. At this point, urge the teams not to make decisions, but simply to list all the possible presentation options that are already available, or that could be a new part of a personalized learning program. Their lists of options will only be a sampler, but they may reveal the flavor of what is possible through a more complete survey of tasks and projects within the whole faculty.</p>	<b>Protocol #12</b>
30 minutes	<p><b>Going Public #3: A Graphic Representation of Parts Creating a Whole Process</b></p> <p>As the section on the content and process ends, each team needs time to represent the program it has begun to imagine as one process with several facets or phases. A flow diagram might work well. (See Figures 1 and 2 at the beginning of the section.) Cluster diagrams or concept maps can also work well. You can let the teams discover the structure that works best for them, and cruising the room may reveal whether any team is stuck.</p> <p>When teams have developed a representation of their program framework, ask each to present the diagram to other teams and explain it within 5 minutes. If time permits, ask the audience to provide warm or cool feedback.</p>	<b>Going Public #3 Worksheet</b>



# Key Dimension #4: ASSESSMENT

Time	Activity & Description	Materials
10 minutes	<p><b>Key Dimension #4: Assessing Personalized Learning</b></p> <p>This section includes two distinctive forms of assessment:</p> <ol style="list-style-type: none"><li>1) Assessment of Student Work guides students to use standards and criteria to prepare their presentations;</li><li>2) Program Assessment helps teams decide how they will measure their progress in program development.</li></ol> <p>As facilitator, you may want to focus attention more on one than the other.</p> <p>Explain that assessment should support each aspect of a personalized learning program. When students develop PLPs, formative assessment can guide them toward their goals and help them recognize progress or new opportunity. In portfolio development, students can use assessment rubrics to refine and improve their work against the same standards others will use to evaluate it. Assessment via rubrics can also help students organize their work for evaluation using the same scales that will be used in evaluation.</p> <p>Assessment is used in program development to decide whether changes instituted are having a desired effect. Collecting assessment data for selected indicators of progress while a program is growing gives a school change team the ability to argue for support when they succeed, or to argue for more support when progress is not yet visible.</p>	
20 minutes (option)	<p><b>Protocol #13: Assessing Performance: Designing a Rubric for Student Presentations Across Subjects</b></p> <p>Protocol #13 gives teams a chance to collaboratively design a rubric they would use to assess any of the products or presentations that make up their program design. In introducing the task, explain that the collective design of assessment rubrics helps ensure that the teachers involved will be using a similar perspective while assessing student work. Setting criteria that reflect both the standards selected and the task at hand is a balancing act. The indicators for each criterion should be related closely enough to allow students to climb their way up from poor performance to high performance with feedback from their teachers or parents.</p>	<b>Protocol #13</b>

# Key Dimension #4: Continued

Time	Activity & Description	Materials
20 minutes	<p><b>Protocol #14: Assessing Program Development: Tracking Incidents Toward Program Adaptation</b></p> <p>This protocol guides teams through the analysis of incidents while a program is under development. In general, any incident from school life is a fair target for analysis. By selecting an incident from recent memory and following the pattern in Protocol #13, teams should be able to come up with program adjustments that are consensual.</p>	<b>Protocol #14</b>
20 minutes (option)	<p><b>Going Public: Selecting Indicators for Progress in Program Development</b></p> <p>More formally, a team can decide to identify indicators for progress that the school will regard as valid and persuasive. Explain that school-level indicators will prove more convincing by far than classroom-level incidents, though both are invaluable in program adaptation. Selecting school-level indicators may quiet the nerves of those in the community who favor accountability systems.</p>	<b>Going Public #4 Worksheet</b>

# Key Dimension #5: LEADERSHIP

Time	Activity & Description	Materials
30 minutes	<p><b>Key Dimension #5: Leadership</b></p> <p>The introduction to this section stresses the role of informal or collaborative leadership in program design. Its purpose is to show school change teams that they can use their considerable influence to prepare the larger school structure to accept and adopt their plan. Stress the importance of collegial leadership within a profession, allowing teachers special influence with regard to curriculum and instruction. Also stress that crossing boundaries that divide a school can sometimes be awkward.</p>	
15 minutes	<p><b>Protocol #15: Discussion of Leadership Across Organizational Boundaries</b></p> <p>Protocol #15 presents six statements that may restrict change at different levels of the organization. A team can use the statements to brainstorm strategies that may help to change minds within their organization. The strategies may not be applicable to the team's school.</p> <p>Consider asking teams to use the same structure to identify constraints within their own school and brainstorm strategies that might work.</p>	<b>Protocol #15</b>
30 minutes	<p><b>Protocol #16: Strategy Development: Preparing the Whole Community for Systemic Change</b></p> <p>Emphasize that the time has come for teams to return to their schools with a general plan that can be written up as a proposal. In preparation for this, Protocol #16 asks teams to sketch an overall strategy. They may also need time to prioritize activities in their plan so the approach will prove both feasible and effective.</p> <p>Creating a timeline of major steps for the coming year may help them see that the steps they plan to take are manageable.</p>	<b>Protocol #16</b>

# Key Dimension #5: Continued

Time	Activity & Description	Materials
20 minutes	<p><b>Going Public #5: Leadership Through Action Planning</b></p> <p>The final protocol asks the team to distribute parts of the plan for introducing personalized learning to individual members of the team. Remind the teams that some early work, such as writing a draft proposal or short prospectus, may be essential for later parts to work. The action plan should remain a flexible document throughout the period of introduction. Fresh problems and opportunities change the processes we design to make change happen.</p> <p>In going public, individuals within a team can explain the roles they will adopt and the steps they will take to make the whole proposal work.</p>	<p><b>Action Plan Worksheet</b></p>
15 minutes	<p><b>Closing: “Freewrite”</b></p> <p>As the session ends, a freewrite of five minutes can help team members see what they have accomplished and also explain areas of confusion or concern. When the freewrite has ended, members can either read their thoughts to their team or to the whole group. This approach has a greater effect when the whole group simply listens to what others have said. At the end, you can invite individuals to comment on what they have heard.</p>	