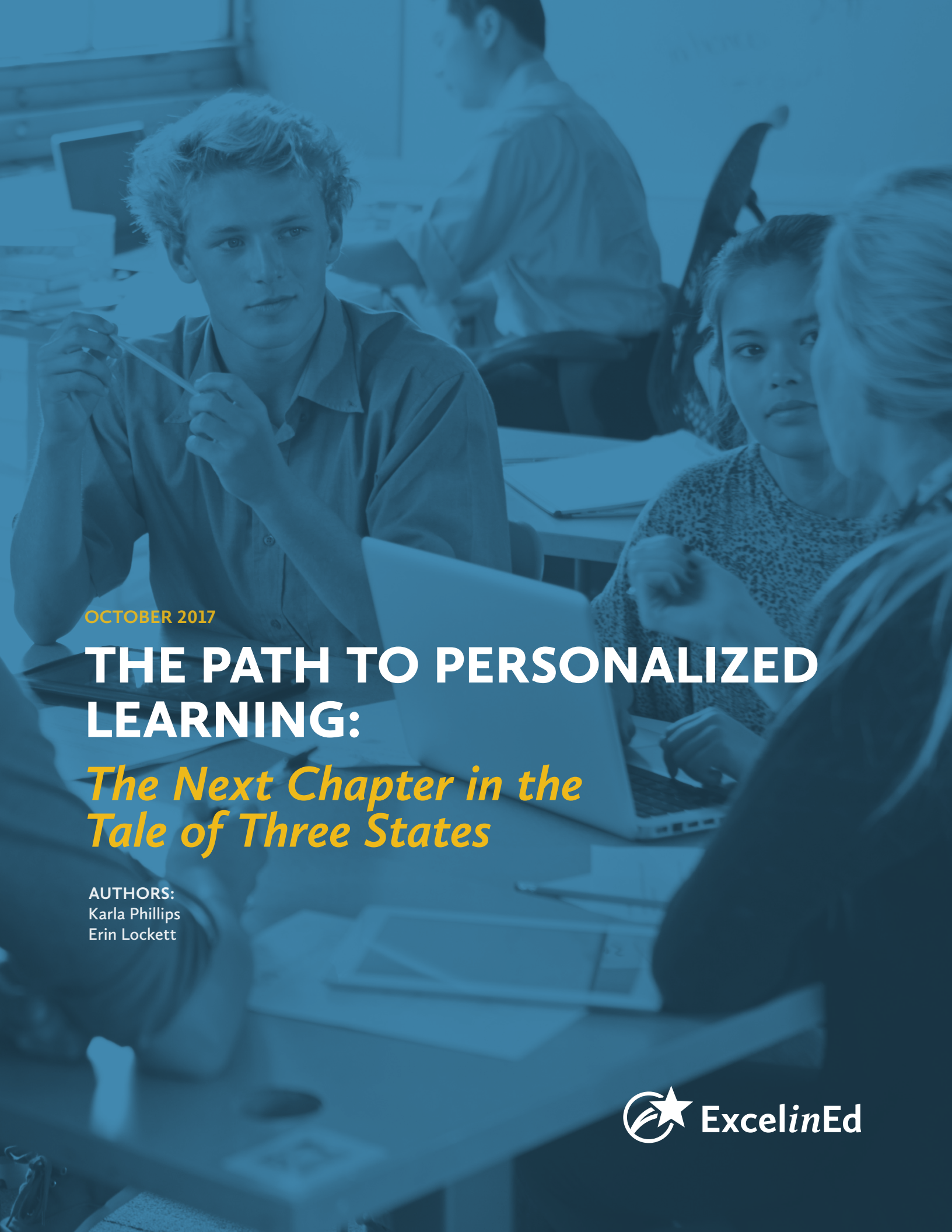

OCTOBER 2017

THE PATH TO PERSONALIZED LEARNING:

The Next Chapter in the Tale of Three States

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About Excel*in*Ed

Launched by former Florida Governor Jeb Bush in 2008, the Foundation for Excellence in Education (Excel*in*Ed) is igniting a movement of reform, state by state, to transform education for the 21st century economy by working with lawmakers, policymakers, educators and parents to advance education reform across America. Learn more at **ExcelinEd.org**.

This research was funded by The Stiles-Nicholson Foundation. We thank the Foundation for their support but acknowledge that the findings and conclusions presented in this report are those of the author(s) alone, and do not necessarily reflect the opinions of The Stiles-Nicholson Foundation.

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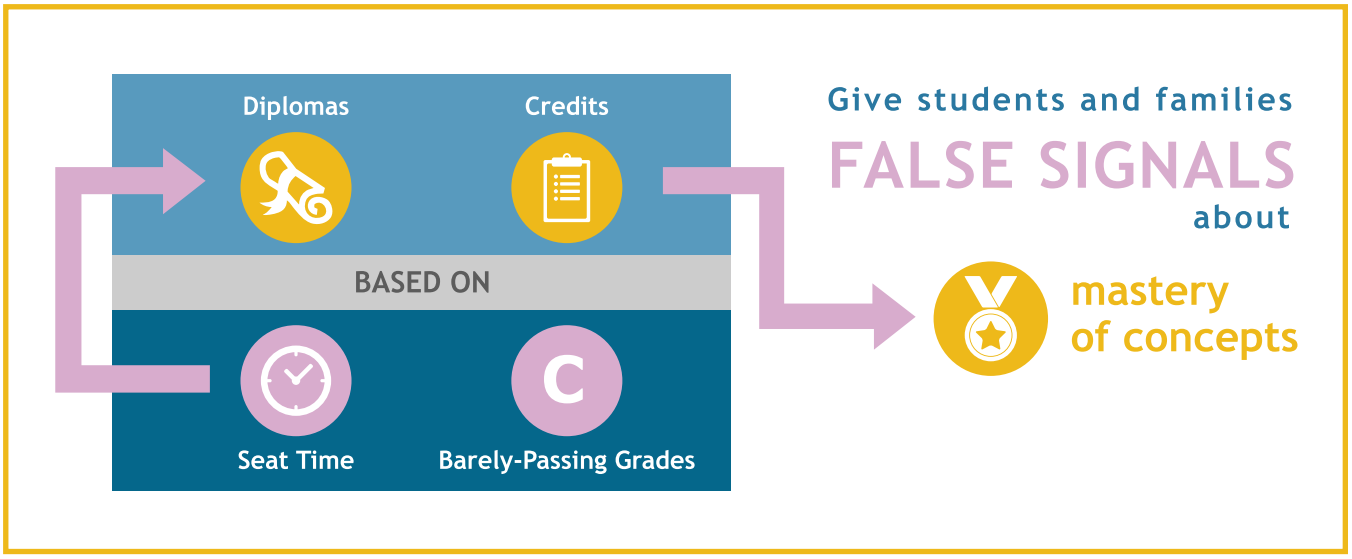
Introduction

Completing high school should mean that students are ready for what comes next—the pursuit of post-secondary education or entry into the workforce. But increasingly it does not for students in the United States. A recent study found that about one in three students entering four-year colleges require remediation. At two-year colleges, that figure jumps to over 40 percent.[1] A survey of 200 campuses earlier this year found more than *half* of incoming students must take remedial courses to be college ready.[2]

Students who require remediation spend time and money in non-credit bearing courses, which drives up the time to degree and increases the already steep cost of college to students and taxpayers. The costs of remediation create barriers to completion for many students, particularly low-income and first-generation college students. The tuition costs of remediation are estimated at around $7 billion annually.[3] For students who can't afford it, the time and cost of remedial courses can prevent them from finishing college, saddling them with debt and no degree to show for it.[4]

Students entering the labor market directly out of high school face a similar challenge. More than 60 percent of employers report that high schools simply aren't doing enough to prepare students for the workplace.[5] Four out of five employers claim that high school graduates have serious gaps in their preparedness for today's jobs.[6] These deficiencies in knowledge and skills require employers to invest significant time and money to educate and train new hires.

Readiness gaps begin before students enter our K-12 education system. However, these gaps widen as students attend traditional schools. One contributing factor is the K-12 system's focus on progressing students through courses and grades based on time and minimum standards rather than true mastery of key content and skills. The pace of progress through content is determined by grade level and the time spent studying concepts, rather than whether students have mastered the material and are really ready to move ahead. In this traditional model, students need only demonstrate minimal understanding to move on to a new subject. As a result, students with only a partial grasp of content progress to new concepts that build on prior knowledge—creating gaps in knowledge that can, in turn, prevent students from mastering more difficult content and reaching their full potential. This emphasis on seat-time over mastery contributes to the disconnect between a national graduation rate of over 80 percent[7] and only one in four high school seniors testing proficient in math.[8] Our current system sends mixed messages and false signals to students and their parents.



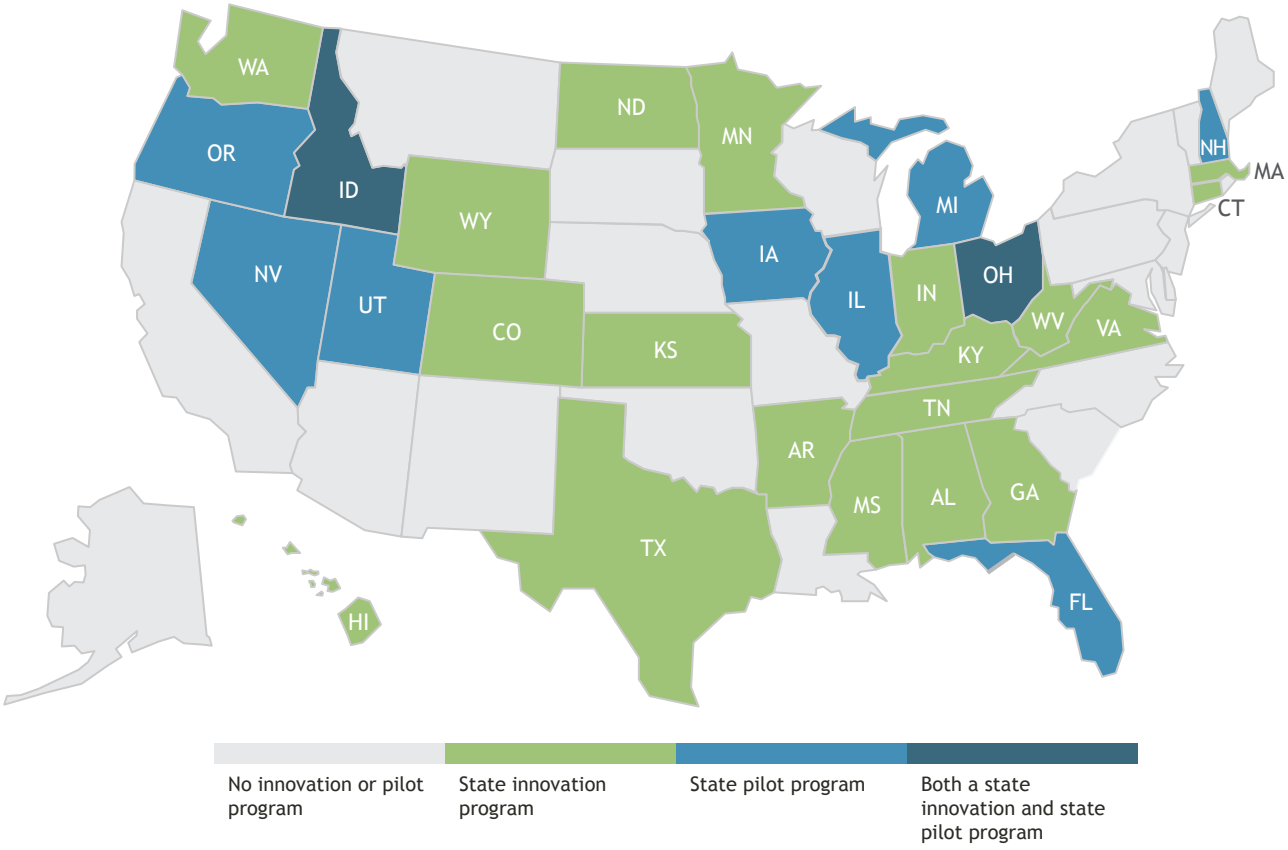
There is another option. Personalized learning tailors a student's educational experience to meet their unique strengths, interests and needs while empowering students to play a greater role in their learning. Coupled with flexibility in pace and delivery, personalized learning is grounded in the idea that students should progress *only* when they demonstrate mastery of key content and skills *regardless* of the time spent in class or even where instruction takes place. This student-centered approach is designed to fully prepare students and ensure that they graduate with the knowledge and skills necessary for college or career.

Personalized learning departs from the traditional structure in a few key ways. It prioritizes mastery over seat-time and it allows students to progress toward proficiency via different paths and at different rates. Mastery-based progression is a fundamental component of personalized learning, and it ensures equity and rigor for all students. This is also where schools will encounter policy obstacles at both the district and state-levels.

Ten states have enacted legislation authorizing specific competency-based pilot programs and several others have broad innovation programs to provide the flexibility needed to pursue personalized learning and mastery-based programs. Other states have taken action at the state-board level to incorporate the concept mastery into graduation requirements and student performance assessment.[9] The terms competency, proficiency, and mastery are often used interchangeably.

In Excel*in*Ed's 2016 report *Policy, Pilots and the Path to Competency-Based Education: A Tale of Three States*,[10] we followed the different paths that Idaho, Florida and Utah are taking to pursue personalized learning. Here we pick up where we left off, tracking the next phase of implementation of each state's pilot program. In this report, we: describe how pilot sites were selected; examine states' and local educational agencies' LEAs' communications plans and strategies to build support for these initiatives; discuss policy barriers they have faced and how they've been overcome; and identify key lessons learned.

Innovation Programs and State Pilots



Source: ExcelinEd, 2017

Policy Paths to Personalized Learning

The shift to personalized learning is ultimately a local decision but, nevertheless, requires state support, flexibility and action to address conflicts between a mastery-based system and policies predicated on grade-level standards. Rethinking core state education policy structures—including course requirements and scheduling, funding, accountability and even accreditation—to accommodate a shift to a competency-based system represents significant change, and should be pursued thoughtfully and carefully. But it also doesn't need to be done all at once.

We believe that the most effective model is for states to develop innovation or pilot programs for interested districts and schools to develop and implement their own personalized learning programs, providing flexibility from policies and practices that can be barriers to implementation. When pilots incorporate thoughtful and informed planning, flexibility to support implementation and careful evaluation, they offer schools, districts and states the opportunity to experiment, learn, revise and perfect programs and policies to inform broader implementation and reform.

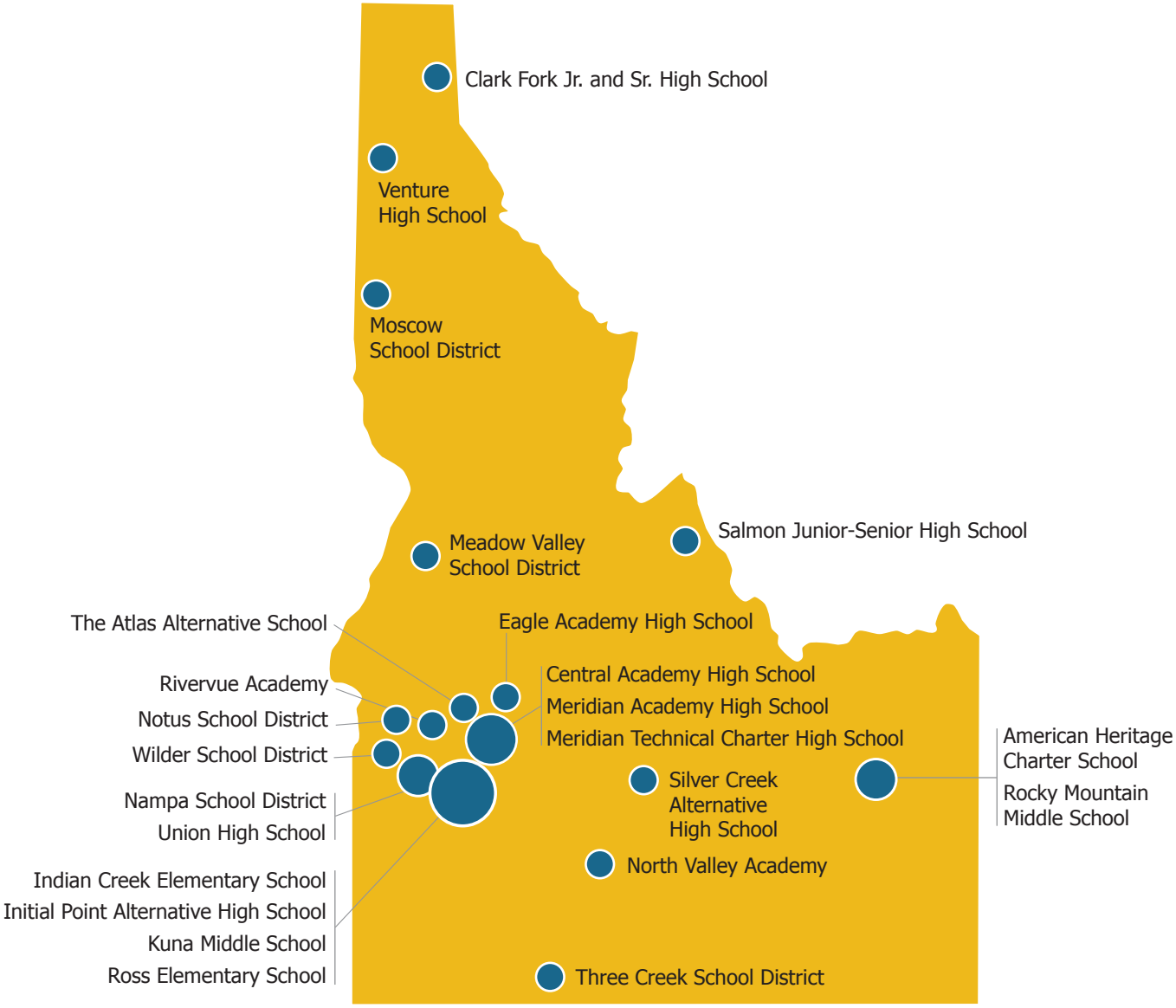
In Excel*in*Ed's *Policy, Pilots and the Path to Competency-Based Education: A Tale of Three States*,[11] we detailed three such state pilot processes in Idaho, Florida and Utah. In each state, the programs were developed through different means. Florida and Utah proceeded, though differently, to further develop innovation already taking place in their districts. Idaho developed the pilot program in response to a multi-year push to improve the state's education system.

In the year since that report was released, districts and schools in each of these states have made significant progress in implementing their pilots. This report examines what policy barriers participants in the pilots have faced and how they've overcome them, as well as what challenges remain. We also look at how successfully these schools, districts and states are engaging with parents and other stakeholders, and what feedback they are receiving. Finally, we highlight key lessons learned and next steps for the pilot programs in each state.

Our review resulted in a series of recommendations for other states, districts and schools as they chart their own path toward personalized learning.

Idaho

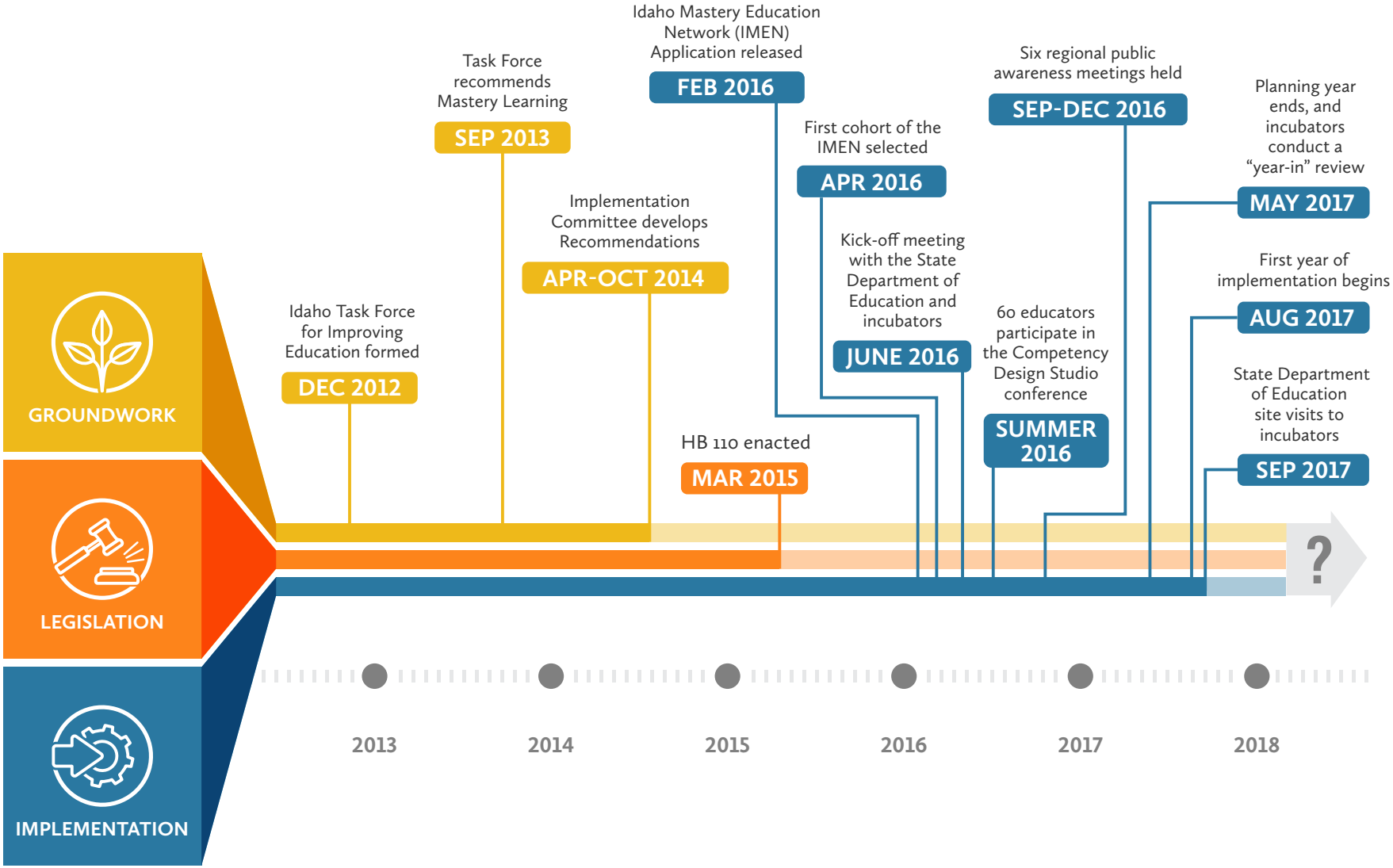
Established under House Bill 110 (2015), Idaho's Mastery-Based Education pilot enters its first year of implementation this school year (2017-18), following the selection of 19 local "incubators" and an initial planning year.



Together, Central Academy High School, Eagle Academy High School and Meridian Academy High School make up the West Ada Academy High Schools.

Dots sized to reflect the number of incubator sites located in geographic proximity.

Idaho's Path to Mastery-Based Education



Background

In Idaho, personalized learning is known as mastery education, and pilot LEAs are known as incubators.[12] The state's journey toward mastery education began at the end of 2012. The State Board of Education, under direction from Governor C.L. "Butch" Otter, commissioned the Idaho Task Force for Improving Education with a broad charge to identify strategies to improve Idaho's education system.[13] After roughly nine months of study, the Task Force released its recommendations. Chief among them was for Idaho to implement a mastery education system.

To smoothly transition to mastery-based education, the State Board of Education established a mastery education implementation committee. This committee was tasked with researching mastery education and making specific recommendations for implementing it in Idaho. In 2015, the work of the implementation committee led to the passage of House Bill 110,[14] which officially began the state's journey to mastery education.

The application to participate in the incubation process was released in February 2016. In addition to their proposal to implement mastery education, applicants were required to commit to collaborating and capacity-building with the other LEAs accepted into the Idaho Mastery Education Network (IMEN). In addition, the state required applications to reflect theories of action and stipulated that incubators agree that 2016-17 data would serve as a baseline year for evaluation. The application also indicated that the IMEN would continue to identify new outcomes measures throughout the implementation process.[15] An independent panel of national experts and practitioners scored each application across a rubric based on successful work in Ohio and in consultation with national experts.

In May 2016, after a rigorous selection process, the state department of education identified 19 regionally diverse LEAs to form the first cohort of incubator sites for five years. June 2016 to August 2017 was dedicated to design and planning. The next four academic school years will focus on implementation and evaluation. The Idaho state legislature appropriated $1.35 million for grants in 2016 and just over $1 million in 2017.

The Next Chapter of Idaho's Story

To support incubators throughout the process of designing and implementing their mastery education program, Idaho's state department of education provides both resources and funding. To provide access to expertise and technical assistance equitably across incubators, the state contracted with reDesign, an education design company that provides strategic design, educator capacity building and knowledge-building services.[16] reDesign helped to design and facilitate the June 2016 state kick-off meeting for all 19 incubators. During that meeting, reDesign and the state department of education reviewed the five principles of mastery education. Following the initial kick-off, mastery education workshops—supported by reDesign—were held regularly throughout the year.[17]

These workshops focused on important elements of mastery education and provided incubators opportunities to collaborate and work on their mastery plans. For example, in the first meeting reDesign led an inquiry into different competencies, shared exemplars and helped incubators to either adopt, adapt or develop their own competencies.

Last year, Idaho's state department of education and each incubator shared the cost of reDesign's support services. This year, the state department of education will fund the full cost as reDesign provides ongoing technical assistance to the IMEN. Idaho leaders have found partnering with reDesign at the state level to be an effective strategy to provide consistent, expert and statewide support to incubators—who vary in their knowledge and experience with mastery-based learning—as they design and implement their mastery education programs.

In addition to the statewide partnership with reDesign, the state sponsored attendance for 60 educators and school leaders at the three-day Competency-Based Learning Design Studio Conference in New Hampshire in summer 2016. During the conference, participants worked on their own plans and designs with competency-based learning experts, as well as administrators and teachers with experience implementing a competency education model.

In addition to providing access to resources and professional learning to the IMEN, the state allocated $1.35 million in grant funding to incubators last year. LEAs spent funds differently depending on where they were in the process of developing their mastery education plan. Common expenditures included purchasing equipment or technology, such as learning management systems (LMS)[18] to help LEAs organize and deliver flexible learning options to students. Other uses of funds included providing professional development, teacher stipends and site visits to learn from schools with successful mastery education programs within and outside of Idaho.

FIVE PRINCIPLES OF MASTERY EDUCATION

Five key principles form the basis of a widely accepted definition of mastery education developed by innovative leaders, practitioners, CompetencyWorks and International Association for K-12 Online Learning (iNACOL):

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

Source: CompetencyWorks

At the end of the 2016-17 school year, each incubator participated in a week-long symposium hosted by the state department of education and supported by reDesign. The first half of the symposium was structured as a workshop in which participants worked to finish their mastery plans and identify next steps for the following year. Incubators worked both within their own teams and with educators and leaders from other incubators as critical partners to collaborate, learn from and share best practices. The state department of education also provided model competencies, performance assessments and other resources to LEAs struggling to develop their own.

The final two days of the symposium focused on curricula development and unit design for a mastery education program. ReDesign demonstrated how to structure curricula and units around mastery learning cycles—to move students successfully from first making meaning to synthesizing content. Using this information, incubators worked in their own teams—and in some cases with grade-specific teams—to design their own curricula and units. This work continued through the summer, culminating in visits from the state department of education to each incubator to review their plans and provide strategic advising at the start of the 2017-18 school year.

"It's interesting. We thought that there would be all of these barriers to beginning the implementation of mastery education. But, we've found that for the most part many are just perceived roadblocks or administrative. We have a lot of ways to work around them temporarily. Over time, we will identify the persistent issues that arise and develop more permanent solutions."

Kelly Brady, Director of Mastery Education for the Idaho State Department of Education

Moving to mastery education is a significant transition. As such, the state department of education anticipated that there would be a variety of state policies, such as seat-time and assessment requirements that could present barriers to designing and implementing a mastery education program. But they instead found that in working with the incubators, they were able to think through small adjustments to work around policies that are incompatible with mastery-based education. For example, to make sure that state reporting systems accommodate schools using mastery education, the state department held a meeting with those implementing mastery and the department officials who collect and manage school data. They agreed to add a function to the online reporting system that, if selected, would modify reporting forms to be compatible with mastery programs. To address the challenge of seat-time requirements, the state allowed the accepted application to participate in the IMEN to serve as an approved seat-time waiver, eliminating extra steps to secure needed flexibility.

Despite finding solutions to many of the issues facing incubators as they transition to mastery education, challenges remain that require action from the state, ranging from more mundane administrative issues to foundational state policies. One administrative challenge is the way Idaho schools are required to take attendance to ensure accuracy and consistency across the state. Since under mastery models, students may not attend traditional class periods or even conduct all their learning inside the school building, the traditional approach to class-based attendance is no longer relevant. To address this, some incubators have shifted from taking attendance at the start of each class period to once in the morning and once after lunch. Others are adopting technology-based solutions to monitor attendance at off-campus learning sites, such as internships. While incubators are finding work-around solutions to these challenges, failing to address them systemically creates inefficiency, requires focus and attention that could be spent on core issues around instruction and transition, and does nothing to reduce barriers for districts and schools whose leaders may be less willing to circumvent established processes and procedures.

While Idaho has largely succeeded in navigating around policy roadblocks, the state still needs to work out an effective way to fund schools employing a mastery education program. To update the state's school funding formula, and hopefully address the mastery education funding concern, the Idaho state legislature created an interim committee to study the formula and make recommendations on how it might be improved.[19]

Although Idaho's mastery education program is in its early stages, some incubators were further along than others and began to implement their programs during the planning years. While mostly anecdotal, those early implementers appear to be enjoying some success. For example, in its first year using its mastery-education model one alternative school increased student performance on the SAT markedly.[20] Given the overall enthusiasm for mastery education, the state is preparing for a second cohort of up to twenty incubators for the 2018-19 school year.

Lessons Learned from Idaho

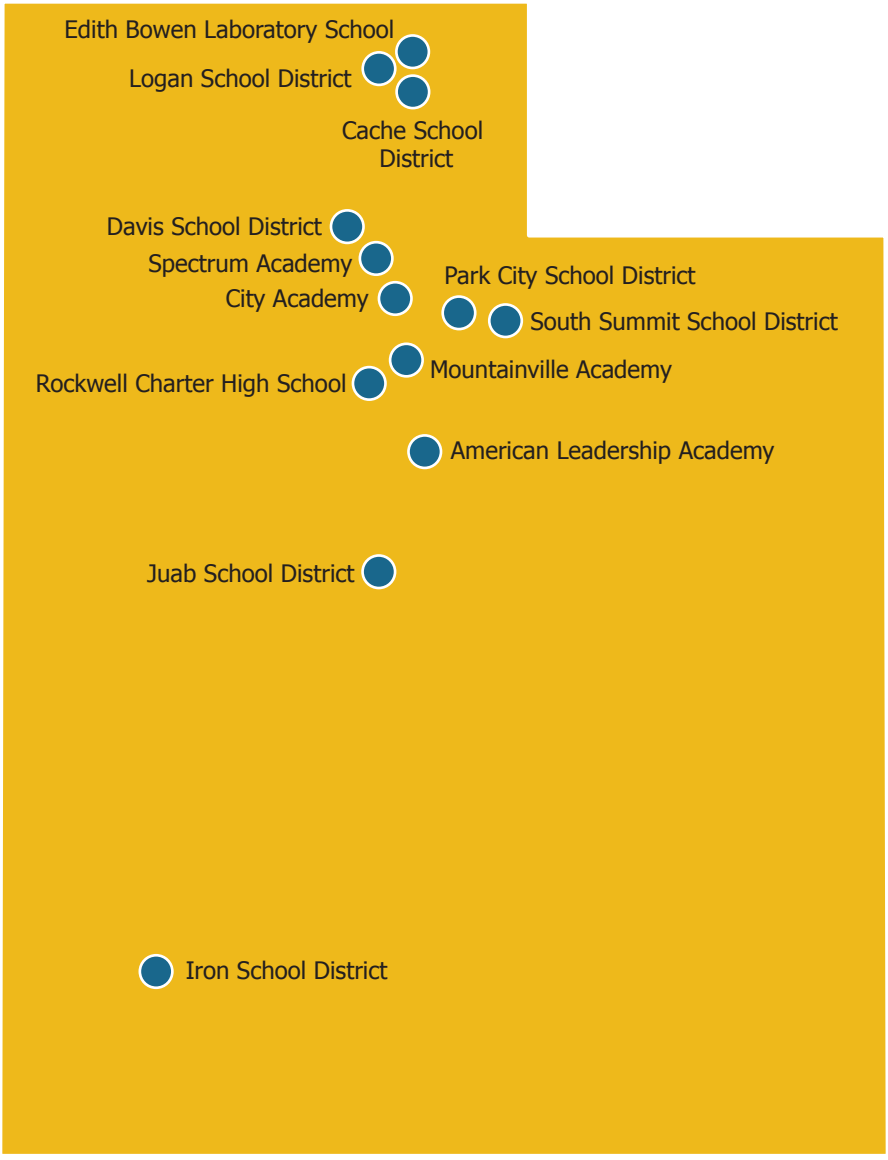
Carefully craft messages about mastery education. Idaho is very intentional about how it messages the mastery education incubator process. From the very beginning, the state was careful about how it described the transition, even choosing to call it mastery, rather than competency-based education. State leaders believe that the term mastery is a stronger signal to stakeholders of the state's vision for the highest standards of achievement for students. The state made a similar decision in calling the 19 LEAs transitioning to mastery education incubators rather than pilots. This term is borrowed from the business community and is meant to convey to that this program is meant to grow, unlike pilots which can be fleeting.

Support local communications capacity. Thoughtful messages about mastery education are critical but are not sufficient to support an effective transition to a new style of education. The LEAs participating in the IMEN need to engage with students, parents, teachers and other community stakeholders on a regular basis. They need to make sure that everyone clearly understands what mastery education is, what changes are being made to their schools and, most importantly, how this new model of education will better support student learning. Recognizing those needs, the state department of education is developing a communications toolbox for incubators. Among other resources, the toolbox includes a brochure about mastery education, a one-pager describing the model and a PowerPoint presentation. Providing LEAs with this toolbox of templates they can adapt with their own logos ensures that incubators and the state are communicating in lockstep, using consistent and strong messages about mastery education in Idaho.

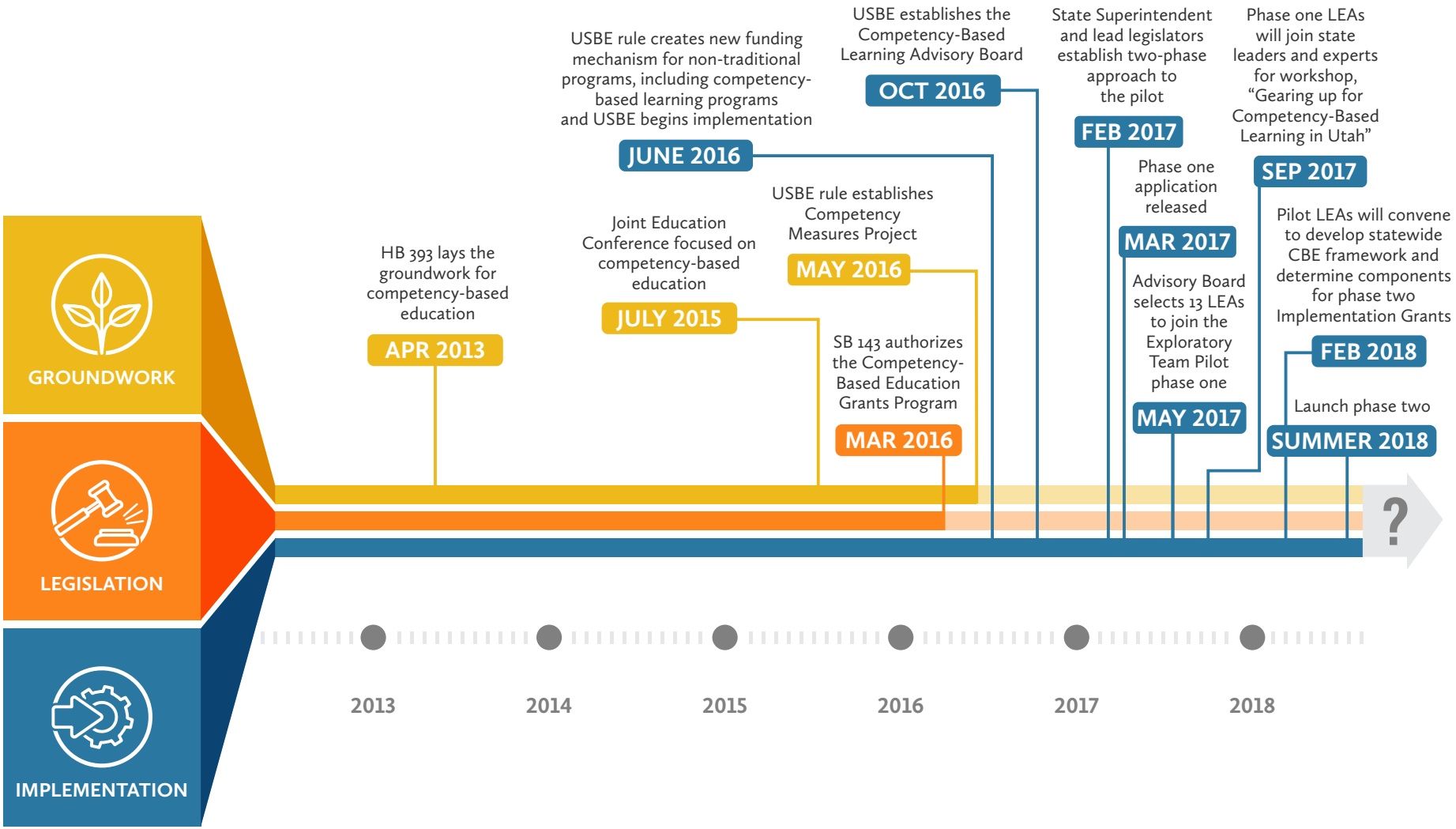
Emphasize collaboration and building communities of practice. In addition to developing their own mastery education program, incubators are also required to participate in the Idaho Mastery Education Network. The IMEN is designed as a professional learning community in which participants work together to improve their own mastery education plans, as well as share expertise and experiences. The Network also serves as a platform for the state department of education to interact with incubators, provide them with resources and support their design efforts. To provide opportunities for further collaboration and learning, Idaho provided the necessary financial resources for incubators to attend conferences and conduct site visits.

Utah

Emerging from House Bill 363 (2013) and Senate Bill 143 (2016), Utah's Competency-Based Education Grants Program enters an exploratory phase this year, following a decision both to expand participation from three LEAs to 12 and to split implementation into two phases: the exploratory phase and the launch phase.



Utah's Path to Competency-Based Education



Background

In Utah, personalized learning is known as competency-based education.[21] The state started to lay the groundwork for LEAs to implement competency-based education programs nearly five years ago. In 2013, the state passed HB 393,[22] requiring the State Board of Education to recommend a funding formula that accommodates schools and districts using a competency-based education approach. The law also allows LEAs to waive some requirements that would otherwise impede personalized learning for mastery, such as attendance and class size.

Utah has also provided a partial solution to a thorny issue arising from the incompatibility of the state's funding system with competency-based progression. For example, since the state pays schools monthly based on enrollment, schools using competency-based education could lose months of funding on behalf of students who complete requirements to graduate early, injecting a perverse incentive to retain students in school for a prescribed period of time and potentially undermining a core principle of competency-based education.

To address this issue, last session, the legislature established a funding pool allowing LEAs to seek reimbursement on a monthly basis for state approved competency-based education models. While the State Board has not yet defined the mechanism, once implemented this approach will help to mitigate ease concerns about funding associated with operating a competency-based education program.

All the steps Utah has taken to eliminate barriers and to support schools implementing personalized learning culminated in the establishment of a statewide competency-based education pilot program last year.[23] The legislature authorized the State School Board to approve as many as three planning grants for the 2017-18 school year. The intent was to provide three LEAs with funding for a year to develop their competency-based education program and then to proceed to full implementation in the 2018-19 school year.

The Next Chapter of Utah's Story

After the state legislature enacted the pilot program, the first step the Utah State Board of Education (USBE) took was to conduct a needs assessment to gauge LEA interest in the pilot program and evaluate LEAs' knowledge and understanding of competency-based education programs across the state. They found far more than three LEAs interested in the program. Yet despite their interest, these LEAs recognized they lacked the knowledge and experience to immediately begin designing a successful competency-based education program.

To accommodate the high-levels of interest and better prepare LEAs to develop and implement a competency-based education program, the USBE asked the state legislature to allow the pilot to be expanded to more LEAs and broken into two phases: exploratory and design. With the legislature's approval of the two-phase approach, USBE released the application to participate in the pilot.

Applicants were required to articulate their rationale for pursuing competency-based education, articulating why they were interested. Additionally, they had to demonstrate broad commitment from leadership to competency-based education. The application required applicants to name at least four individuals from the LEA who would work on the competency-based education program, including a superintendent or executive director and a school board member. Requiring such a strong investment from an LEA's leadership acted as a screen, and only those LEAs seriously committed to transitioning to a competency-based education program applied.

Ultimately, USBE selected 12 LEAs, including seven charter schools and six school districts to participate in the restructured pilot. This number includes experienced LEAs with existing competency-based education models that have helped introduce the education model to Utah, as well as LEAs with far less experience. One benefit of including a mix of more and less experienced schools in the cohort is the opportunity for learning from successful models in the state. For example, Innovations Early College High School, a competency-based education school in Salt Lake City, outperforms other Salt Lake schools serving similar populations and will host a site visit in the fall so other LEAs in the cohort can observe and learn from its model.

The exploratory phase runs over the course of the next year and will include foundational conversations among participants to build a common language and understanding of competency-based education, share tools and resources and conduct site visits as a group. In addition, this exploratory year will provide participants with the opportunity to observe effective practices from models both in Utah in other states. The goal is that by summer 2018, participants will develop a comprehensive competency-based education framework for the state that will form the basis for the phase two implementation grants.

"Over the course of the next year, the pilots and USBE will have some of those critical foundation building conversations to learn about competency-based education, share tools and existing resources, as well as develop new resources. We will conduct site visits, in and out of state, to places that successfully implemented a competency-based education program to get a sense of what is working and what was challenging. We will look for things to bring back that will inform Utah's effort around competency-based education."

Sarah Young, Digital Teaching and Learning Coordinator at the Utah State Board of Education

Lessons Learned from Utah

Thoughtfully and deliberately develop a state framework and build a shared understanding of the elements of a successful competency-based education program. The statewide pilot was originally designed for three LEAs to spend one-year planning and implement the following year. But upon a closer analysis of the field, the Utah State Board of Education determined that there was a need for a preliminary exploratory phase first to ensure that all participating LEAs have a common understanding of competency-based education and have a role in establishing the framework for statewide competency-based education program. Taking the time to engage in building a solid foundation sets the stage for a successful planning and implementation to follow.

By expanding the pilot from three LEAs to 13, Utah was able to include several LEAs that had already successfully implemented a competency-based education program. These LEAs will be able to bring their experience to bear on developing the statewide competency-based education framework, and will serve as models for participants that are just beginning their competency-based education programs.

Involve students in the planning process. Innovations Early College High School, Utah's model competency-based education program, began its transition to this innovative education model in 2012 by surveying their students to learn what they liked about high schools, what they didn't like and what they would do differently if they could create their own school. Students' responses to these questions formed the basis of Innovation's competency-based education design.

Logan County High School took a similar approach when designing both the physical layout of the school and the design of its competency-based education program. David Long, the district's educational and technical services director organized three different groups of students to engage in project based learning. Educators and the school's architects observed and took notes on how best to support this approach to learning and identify the kinds of spaces and resources necessary to allow for flexible learning.

Communicate early and often with students, parents and other community stakeholders. Switching to a competency-based education program is a significant change, and LEAs need to communicate early and often with parents and other community stakeholders to ensure they understand what will change and how it will improve education for their students. The LEAs in Utah that have already successfully transitioned to a competency-based education program communicated regularly with parents and other stakeholders, responded to their feedback and involved them in the process.

Framing these discussions is important. Early implementers of competency-based education found that dividing early stakeholder engagement into two components, what is working and what could be done better, was fruitful. They found taking this approach rather than focusing on what isn't working first, avoided re-litigating past polices and decisions. According to Superintendent Rick Robbins of Juab County, parent and student surveys were an invaluable tool for gathering and responding to feedback as they shifted to a competency-based education model.

And finally, once an LEA implements its competency-based education program, it should continue to engage regularly with parents and other stakeholders. Many parents struggle with the fact that the competency-based education approach often does not include performance measures that parents recognize easily, such as class

ranking or even a traditional grade point average and the methods or communicating these, like report cards and transcripts, may also change. Explaining how performance is assessed and how schools are thinking and communicating about how non-traditional measures translate to institutions of higher education is critical.

A frequent and consistent issue that continues to be raised in many states and schools is parent concern that institutions of higher education will not recognize non-traditional diplomas or transcripts or that students will somehow be disadvantaged. Because of both parent concerns and higher education requirements, educators are wary of exploring innovative methods to determine and report student achievement. Fortunately, Utah policymakers wisely took a preliminary step to address this issue in the original legislation. S.B. 143 included a requirement that the state's institutes of higher education recognize and accept a diploma earned in a competency-based program. Further steps may be required to ensure fair and equitable access to scholarships and program admission (e.g. School of Business).

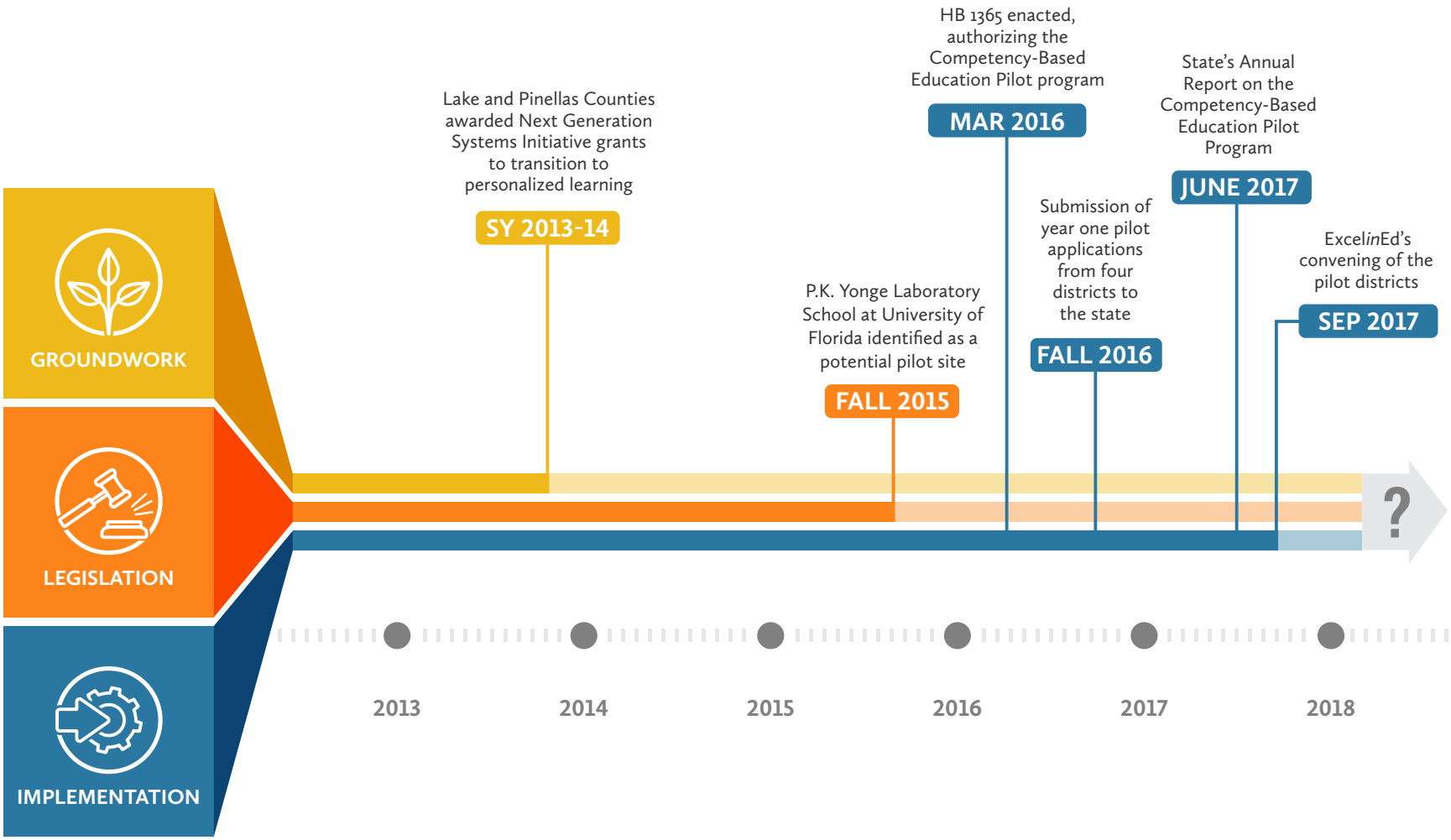
Provide ongoing support and training to teachers to shift to competency-based education. The LEAs in Utah that have successfully implemented a competency-based education program make clear: teachers are the key. That said, switching from the traditional model of education to a more personalized approach can be challenging and intimidating. Shifting to a competency-based education approach can involve more technology-based resources, which can prompt worries that teachers are being replaced by computers. Successful competency-based education programs address these anxieties directly. In Logan City, the school leadership worked with teachers gradually to become more comfortable with online resources. In addition, they collaborated with teachers to determine how online curricular resources can free them from constant content production, and allow them to really teach— devoting their attention to mapping a student's education, supporting their specific needs and tailoring an academic program to fit each student's goals.

Invest in technology infrastructure that supports instructional strategies. While technology shouldn't drive instructional design, it can be a critical tool for teaching and learning in a successful competency-based education program. Technology can support teachers in developing, assessing and tracking progress against individual student learning plans and can support "pace and place flexibility" by allowing students to access curricula even when they're not in the school building. A LMS helps by providing students online access to courses and teachers with curricular resources, as well as other key support. Finally, either through the LMS or other online means, investments in technology can expand students' access to college and university courses. This is invaluable for LEAs without as many nearby resources, such as institutions of higher education

Florida

Established under House Bill 1365 (2016), Florida's Competency-Based Education Pilot Program enters its second year of implementation this school year (2017-18), although some of the five pilot sites have been engaged in competency-based education since before the pilot was established.

Florida's Path to Competency-Based Education



Background

In Florida, personalized learning is often referred to as competency-based education. In many ways, the state's long history pioneering numerous innovations related to seat-time policies positions Florida LEAs well for implementing a competency-based education model. However, at the state level, the path to competency-based education was nontraditional. Rather than establishing a pilot program and issuing a call for applications, legislation was passed to provide support to those LEAs that were interested or already pursuing competency-based education. This approach leverages local successes and creates a path to implement competency-based education for other LEAs to follow.

Building on success with competency-based education in a few LEAs, Governor Rick Scott signed HB 1365, creating a Competency-Based Education Pilot Program for a period of five years in March 2016.[24] Five LEAs were identified to participate in the program.[25] HB 1365 authorized the State Commissioner of Education to provide waivers to pilot sites for regulations and policies related to competency-based education. The waiver mechanism is intended to create flexibility from state policy where needed, which will also help the state identify areas where policy change may be warranted to support broader expansion of competency-based education. Each pilot LEA must submit an application to the Florida Department of Education detailing annual goals, performance outcomes, communications and technology plans, how they will allocate resources as well as specified waiver requests. At a minimum, annual performance goals must include: student performance indicators measured under Florida's assessment and accountability system;[26] promotion and retention rates; graduation rates; and indicators of college and career readiness.

The legislation also required the Department of Education to submit an annual report on the Competency-Based Education Pilot Program to the Governor and the House and Senate Presiding Officers.[27] This report identified each district's communication plan, professional development plan, work related to student progression and each district's successes and challenges. In this report, it is noted that Lake County Public Schools, one of the two Florida districts with grants from the Gates Foundation, has decided to "pause" its work in competency-based education for the 2017-18 school year. All of the remaining four districts indicated their participation in the pilot program for 2017-18.

The advantage of Florida's approach to competency-based education is that it is flexible and locally driven. The creation of the pilot program is a response rather than the driver of the transition to competency-based education, and the law also formalized a state-level process with the goal of creating the feedback loop to identify policy levers and barriers. The pilot program is designed to accommodate participant needs as they arise; and the hope is that in working with these five LEAs, the state will develop a supportive environment for other districts and schools to pursue a competency-based education program successfully.

The Next Chapter of Florida's Story

In Florida, the push for competency-based education is driven locally. For that reason, much of the work on competency-based education over the past year has been concentrated in four of the five LEAs selected for the pilot program. The activities each LEA pursued in year one of the pilot varied based on both how far along the district was in the process of transitioning to competency-based education and the scope of their proposed program.

Highlights from Florida Pilot Sites

In Palm Beach County, the competency-based education program was crafted to specifically respond to parents' request for increased rigor in mathematics. The pilot focuses on accelerating mathematically talented and gifted students in the area of mathematics in 66 elementary schools. In their Accelerated Mathematics Program (AMP), eligible students receive personalized learning opportunities through accelerated and rigorous mathematics instruction, which was not limited to one grade level of content. These students also had access to web-based resources beyond the school day. The goal is for students in grades three through five to earn at least a score of "three," which is defined as satisfactory, on the Florida Standards Assessment for the next grade. In other words, fourth-grade students would score at least a three on the fifth-grade test. The ultimate goal for AMP is create a pathway for these students to successfully advance from Algebra I in grade 7, through Geometry, Algebra 2, Statistics and Pre-Calculus to Calculus in grade 12.

The results for year one revealed that 97.9 percent of participating students in grade three earned satisfactory scores on the grade three state statewide assessment; 99 percent and 98.3 percent, respectively, of students in grades four and five, taking the state assessment for grades five and six, also earned satisfactory scores. The percent of students in grades four and five achieving learning gains was 74 percent and 78.3 percent, respectively. The achievement levels and learning gains of all participating students were at a higher rate than their peers.

To reach these goals, Palm Beach focused on a few key implementation strategies. The district worked with participating schools to build educator buy-in and awareness of AMP and competency-based learning instructional practices, such as: scope and sequence; curricular and instructional resources; and communication guides for students and families. This work led to schools creating their own vision for AMP, promoting educator buy-in and ownership over their own program. Additionally, Palm Beach developed a master teacher schedule to ensure that all participating students receive at least 60-75 minutes of uninterrupted math instruction from qualified teachers.

At the other end of the spectrum, the competency-based education program at P.K. Yonge Developmental Research School is designed for all K-12 grades and subjects. Evolving from the school's experience with Multi-Tiered System of Supports, its focus on the needs of individual learners and its use of multi-grade learning communities and standards-based report cards for elementary school students, the school has been working toward transition to competency-based education for several years.[28] The pace of transition has been deliberate, beginning with an increase in the use and application of Universal Design of Learning principles through monthly professional development sessions. These sessions are designed to enhance educator's responsiveness to individual learner needs. Through 1:1 digital device learning environments for grades 6-12, students also have greater flexibility in the use of technology to support their learning.

P.K. Yonge has also begun the work necessary for standards-based grading and report cards in the middle grades. The new report cards specify learning standards for each course and indicate whether a student has achieved mastery of each standard. This transition to a mastery-based reporting structure raises an administrative challenge at the state level. Florida law requires an A-F student grading system for middle and high schools. P.K. Yonge has developed a system to "translate" the mastery-based scale to the A to F scale to accommodate state information systems; but this extra step highlights where state policies and procedures may need to adapt.

Last year, the first of its formal participation in Florida's pilot program, P.K. Yonge concentrated on professional learning. That work focused on building developed a broad commitment and understanding of competency-based education among staff. Key activities included prioritizing learning standards in each content area, developing detailed descriptions of competencies, and designing multiple assessments and pathways for students to demonstrate their knowledge and skills.

P.K. Yonge director Dr. Lynda Hayes cites strong communication with parents and the school community as a key to successful transition to competency-based education.

A Competency-Based Education Pilot Program

On March 25, 2016, Florida Governor Rick Scott signed HB 1365[27] (companion bill SB 1714[28]) creating the Competency-Based Education Pilot Program to be administered for a period of five years in five districts, serving more than 400,000 students in more than 450 schools beginning in the 2016-2017 school year.

The bill authorizes the Florida State Board of Education to give the Commissioner of Education authority to grant waivers to rules related to student progression and awarding of credits in accordance with the stated purpose of the pilot program to "provide an educational environment that allows students to advance to higher levels of learning upon the mastery of concepts and skills through statutory exemptions relating to student progression and the awarding of credits."

The bill requires the school districts to submit applications to the FLDOE that include annual goals and performance outcomes; a communication plan; plan for student progression; plan for technology and digital and blended learning; allocation of resources and identification of state rules to be waived. Additionally, FLDOE is required to compile student and staff schedules before and after implementation of the pilot and submit an annual report to the Legislature.

> "We've tried to make sure that we are communicating with parents and families in ways that they are used to seeing. For example, providing a syllabus at the beginning of a course that explains our approach to evaluating student performance in courses. We want to provide useful information at times when parents are expecting to see how a student is learning, performing and will be assessed. Finally, we engage with parents across multiple media to make sure information is accessible to all."
>
> **Dr. Lynda Hayes**, Director
> P.K. Yonge Developmental Research School

In Pinellas County, the move toward competency-based education predates the statewide pilot program by several years. Pinellas got started with competency-based education after winning a Next Generation Systems Initiative Grant[29] from the Bill & Melinda Gates Foundation for the 2013-14 school year. This support furthered the district's work on their strategic plan for personalized learning, *Pinellas Innovates.*[30] With support from the Great Schools Partnership, Pinellas has designed core competencies, developed performance indicators and constructed task neutral scoring rubrics. The task neutral scoring rubrics allow students to demonstrate mastery of standards through a range of performance tasks, enabling teachers to assess learning across contexts, whether through more traditional assessments, through project-based learning, or other student-driven means. For Pinellas, the goal of this work is to eliminate variance in student outcomes across the district and ensure that all students can reach mastery.

Since its start in five high schools, Pinellas County's competency-based education program has expanded to middle schools, and it will be offered in elementary schools beginning in the 2018-19 school year.[31] But gradually expanding its competency-based education program to a few new schools each year is a slow process. To bring competency-based education and other components of personalized learning to scale in the district more quickly, Pinellas created a menu of competency-based education components and strategies that schools can implement based on their own readiness and needs. The strategy encourages schools to adopt aspects of personalized learning such as, learner profiles, competency-based progressions or flexible learning environments, and gradually expand their programs. Ultimately, this approach could help scale competency-based education more efficiently and effectively across this large district.

Lake County was also a winner of a Next Generation Systems Initiative Grant[32] in 2013-14 and began their work with a cohort of five schools (two elementary, one middle and two high schools). With the support of the Great Schools Partnership, Lake expanded to a total of 13 schools in 2015-16, developed graduation competencies in the content areas of Language Arts, Mathematics and Science and began vetting scoring rubrics for use in these classrooms. Educators and students from Lake County participated in multiple national forums showcasing their work in competency-based education.

In 2016-17, there was a change in leadership at both the school board and superintendent levels. Both seemed to question the uniqueness of the competency-based education/personalized learning pilot and have indicated that they will "pause" the work for the 2017-18 school year.

Seminole County is also authorized to participate in Florida's competency-based education pilot. They notified the State Department of Education of their decision to use 2016-17 as a planning year but intend to participate in 2017-18.

State Policy Issues Across Pilot Sites

As a part of their applications to participate in the competency-based education pilot, each LEA requested waivers from the Florida Department of Education for regulations and policies they believe could encumber the move to competency-based education. Common requests included waivers for the seat time hours required to receive credit, minimum class size requirements, full-time student definition, enrollment qualifications, as well as exemptions from how student learning gains and teacher value added metrics are calculated. LEAs also sought exemptions from recoding and reporting A-F student grades. Most of these waivers were denied by the Department of Education as they do not have the authority to waive state laws.

In addition to waivers from accountability provisions, participating LEAs consistently requested that the state ensure that they receive the appropriate amount of funding based on the students they serve whether they graduate early, need to take longer to achieve mastery, or learn off campus at an internship or in a college course. Given that pilot districts were not reducing instructional time, funding for the participating students remained unchanged.

While Palm Beach, P.K. Yonge and Pinellas spent last year implementing competency-based education,[33] Lake County decided to "pause" their program after significant leadership change among other challenges. Despite eliminating competency-based education, the experience of Lake County provides important lessons to current and future LEAs working to implement competency-based education.

Early and frequent communication and engagement with students, parents, educators and other stakeholders is critical. All of these districts, as most in Florida, implement standards-based instruction and assessments. The transition to personalized learning/competency-based education needs to be communicated as the next step in improving education—not as a change in direction.

"The switch to competency-based education takes place more or less over two phases. In the first phase, education often looks quite similar to what came before: teachers at the heads of classrooms, largely controlling the learning process. In that phase, LEAs can develop workarounds to navigate state-level policy barriers. But these workarounds become significantly more difficult and cumbersome when LEAs truly become student centered, when students are taking college courses early, participating in internships or designing their own learning pathways."

David Ruff, Executive Director of Great Schools Partnership

Implementation fidelity is also essential. Competency-based education is a comprehensive evolution in how schools educate students. Done well, it acknowledges the unique needs of individual learners, leverages tools such as technology to allow teachers to customize instruction to meet those needs, and provides students with ownership of their learning. The transition does not need to take place all at once, but each step needs to align with the ultimate goal of flexible learning in which students are met where they are and only progress once they have reached mastery.

Lessons Learned from Florida

Connect competency-based education work to current district priorities and initiatives. It is essential that competency-based education be seen as an evolution or extension of the district's work to improve the quality of instruction. It must be intertwined with the district's other initiatives or "big rocks" such as teacher evaluation systems, Multi-Tiered Systems of Support and standards-based instruction. Successful implementation of competency-based education is a long-term initiative, an evolution in the approach to learning and instruction, not a "program." Communication, outreach and building local community support must be on-going and a priority to ensure competency-based education initiatives are able to withstand changes in leadership at the district and school levels.

Provide professional learning opportunities and support teachers as leaders. Teachers are the engine behind a successful competency-based education program. Across pilot sites, school leaders emphasize the need to provide professional learning opportunities at each stage of implementation both to support the development of skills and knowledge and to encourage ownership and buy-in. For example, at P.K. Yonge, educators are provided with consistent, embedded professional development. The school provides instructional coaches, summer workshops and strategies to use technology to support student learning. And teachers are empowered to lead critical processes, such as developing systems to track and report student progress.

Build in a continuous feedback loop allowing LEAs to identify and seek relief from the barriers they face. A key feature of Florida's approach to its competency-based education pilot program is that it annually seeks feedback on the policies and regulations that may be barriers for LEAs implementing a competency-based education program through the application and waiver process. This ongoing feedback process allows LEAs to identify new barriers that arise as implementation progresses. The next step is determining where waivers indicate the need for more comprehensive state policy change.

Additionally, although Florida's state pilot program does not include a formal network to connect pilot participants to one another, a voluntary network is emerging. The four participating districts and Excel*in*Ed have formed a Florida Pilot Network. As such, Excel*in*Ed and the districts agreed to identify state and local policy barriers and solutions, identify and provide access to resources and share best practices. To launch the network, Excel*in*Ed sponsored the first convening of these districts in September and created an online platform to provide access to resources and a venue for collaboration.[34] The future sharing of this platform and information will be essential to inform other interested districts of this exciting work in Florida.

Key Takeaways Across States

There is no single right way for a state to pursue personalized learning. Among the three states profiled in this report, each took its own road to developing and implementing its pilot program. There are many advantages to the pilot approach. In fact, one of the most significant benefits of the pilot program model is that it provides policy flexibility to accommodate a variety of different personalized learning structures and to identify specific policy barriers that may need to be addressed at the state level.

As Idaho, Florida and Utah continue move through the design, planning and implementation phases of their pilot programs, key takeaways are emerging that can inform other schools, districts and states interested in pursuing personalized learning for mastery.

Key themes that emerged from the three states include an emphasis on intentional, stepwise implementation. School leaders consistently recommended an incremental approach to change that allows time for professional learning and support at each stage and educating parents and communities. At the state level, Utah exemplifies this principle in its decision to intentionally extend the design process to capture the enthusiasm of districts and schools and take the time to ensure that enthusiasm is paired with a solid grounding in the knowledge and skills needed for success.

Feedback from all three states also underscored the importance of professional learning, both in terms of supporting teachers with resources and time and in connecting educators, schools and districts with others doing similar work through professional learning networks. Both Utah and Idaho are facilitating collaborative learning networks with state resources and support. Although establishing a formal network for pilot sites is not part of Florida's state pilot, the pilot sites themselves are establishing their own voluntary network, emphasizing the value of these communities of practice.

Finally, although in each state motivated and innovative leaders report few actual policy barriers to moving forward in their personalized learning journey, they anticipate future barriers as programs mature that may limit the potential for fully realizing all aspects of truly personalized and mastery-based model. Further, although few state policies are currently preventing implementation, in many cases, schools and districts are finding temporary workarounds, not genuine policy solutions. Workarounds are valuable in the short term, but states must still consider actual policy change to ease the path for other schools and districts interested in pursuing personalized learning.

What's Next?

Focusing support for personalized learning on a manageable number of LEAs allows states to determine the resources and flexibility necessary to provide opportunities for participants to successfully design and implement their vision. Pilots also provide states and LEAs with time to work through how best to adapt policies and rules to fit the needs of a personalized learning program.

Based on the experiences of the pilots in Florida, Idaho and Utah, we offer the following recommendations for states as they consider a transition to personalized learning. These recommendations reflect three strategies being implemented and prioritized in varying degrees across all three states. Our research and experience indicates that these policies can make the biggest impact on all three phases of design, implementation and scale regardless of the state context.

1

Create Statewide Networks of Innovative Schools and Pilots

Networks help states leverage the expertise of their educators as well as school and district leaders and are a viable strategy for states to advance personalized learning. State departments of education should facilitate convenings for educators participating in pilot programs to collaborate, share ideas and workshop their plans and designs. In addition to providing opportunities for pilot sites to collaborate as a network, states should determine ways to support the specific professional learning needs of individual sites. State grants can provide financial support to conduct site visits, join national networks of practitioners implementing personalized learning and attend conferences and other opportunities for collaborative learning.

2

Prioritize Communications and Outreach to all Stakeholders

Consistent and effective communication and engagement with students, educators, parents and community stakeholders is crucial for a successful transition to personalized learning. Not only must communication and outreach plans be required, but also an articulated theory of action that underscores the reason for transition and how personalized learning builds on and connects to existing initiatives. From the very beginning, at the time of application, schools must be prepared to articulate their goals, what they hope to accomplish and how they will measure success. In our report, A National Landscape,[35] we offer helpful suggestions of successful messages.

States should support clear communication by collaborating with LEAs on messaging and developing toolkits to support local communications efforts to ensure that the public hears consistent messages.

3 Ensure a Continuous Process Is in Place to Address Implementation Obstacles

Schools participating in innovation or pilot programs must have a process to request flexibility from state requirements not only at the time of application but throughout implementation. However, strong support from state departments is needed to help schools maneuver through existing state requirements. Even small technical matters such as inputting data into state reporting systems can pose challenges for schools employing a competency-based education model, requiring time and resources to work around. To ensure that LEAs can successfully implement a competency-based education program, states should proactively engage with LEAs to determine what barriers exist and develop solutions. Not only does this process support implementation for early adopters, but it smooths the path for the future by driving solutions along the way. Networks of innovative schools and pilot programs offer a promising strategy to work through challenging issues at both the state and local level.

APPENDICES

Appendix A: Idaho Demographic Characteristics (2014-15)

The first cohort of Idaho's Mastery-Based Education pilot includes 19 diverse incubators from across the state.

	Total Enrollment											
	Number of Schools	Enrolled	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs
State		**290,885**	**223,279**	**2,860**	**50,353**	**4,520**	**3,564**	**6,288**	**56,777**	**141,189**	**12,752**	**27,567**
American Heritage Charter School	1	245	233	1	5	2	3	1	9	66	**	**
Central Academy High School*	1	171	146	5	16	0	0	4	21	96	**	**
Clark Fork Jr. and Sr. High School	1	89	80	0	3	3	0	3	3	50	**	**
Eagle Academy High School*	1	175	144	2	26	0	1	2	29	107	**	**
Indian Creek Elementary School	1	257	231	1	15	4	0	6	16	117	**	**
Initial Point Alternative High School	1	103	90	1	9	0	2	1	12	50	**	**
Kuna Middle School	1	816	712	5	78	6	0	15	83	320	**	**
Meadow Valley School District	1	157	144	0	10	1	0	2	10	92	4	22
Meridian Academy High School*	1	179	149	6	16	2	0	6	22	100	**	**
Meridian Technical Charter High School	1	192	172	1	9	3	1	6	11	40	**	**
Moscow School District	8	2,508	2,151	45	120	77	30	85	195	859	33	239
Nampa School District	26	15,656	9,826	83	5,266	158	64	259	5,413	9,907	981	1,474
North Valley Academy	1	259	197	0	56	5	1	0	57	144	**	**
Notus School District	3	376	255	5	96	7	2	11	103	246	40	39
Rivervue Academy	1	81	42	0	37	1	0	1	37	63	**	**
Rocky Mountain Middle School	1	856	661	3	161	3	5	23	169	439	**	**
Ross Elementary School	1	244	218	0	20	2	0	4	20	102	**	**
Salmon Junior-Senior High School	1	448	442	4	12	4	4	2	20	258	**	**
Silver Creek Alternative High School	1	37	26	0	10	1	0	0	10	25	**	**

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Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
** Together, Central Academy High School, Eagle Academy High School and Meridian Academy High School make up the West Ada Academy High Schools.*
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

	Total Enrollment											
	Number of Schools	Enrolled	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs
State		**290,885**	**223,279**	**2,860**	**50,353**	**4,520**	**3,564**	**6,288**	**56,777**	**141,189**	**12,752**	**27,567**
The Atlas Alternative School	1	128	101	1	23	0	1	2	25	95	**	**
Three Creek School District	1	11	9	0	2	0	0	0	2	8	0	**
Union High School	1	146	72	0	67	1	3	3	70	124	**	**
Venture High School	1	135	110	0	10	3	5	7	15	103	**	**
Wilder School District	3	447	108	1	333	0	1	4	335	441	58	65

	Percent Enrollment										Pupil/ Teacher Ratio
	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs	
State	**77**	**1**	**17**	**2**	**1**	**2**	**20**	**49**	**4**	**9**	**19**
American Heritage Charter School	95	0	2	1	1	0	4	27	**	**	19
Central Academy High School*	85	3	9	0	0	2	12	56	**	**	13
Clark Fork Jr. and Sr. High School	90	0	3	3	0	3	3	56	**	**	8
Eagle Academy High School*	82	1	15	0	1	1	17	61	**	**	13
Indian Creek Elementary School	90	0	6	2	0	2	6	46	**	**	17
Initial Point Alternative High School	87	1	9	0	2	1	12	49	**	**	18
Kuna Middle School	87	1	10	1	0	2	10	39		**	19
Meadow Valley School District	92	0	6	1	0	1	6	59	3	14	10
Meridian Academy High School*	83	3	9	1	0	3	12	56	**	**	14

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Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
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Note: Schools in participating districts may be phased in over time.

	Percent Enrollment										Pupil/ Teacher Ratio
	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs	
State	**77**	**1**	**17**	**2**	**1**	**2**	**20**	**49**	**4**	**9**	**19**
Meridian Technical Charter High School	90	1	5	2	1	3	6	21	**	**	14
Moscow School District	86	2	5	3	1	3	8	34	1	10	16
Nampa School District	63	1	34	1	0	2	35	63	6	9	20
North Valley Academy	76	0	22	2	0	0	22	56	**	**	18
Notus School District	68	1	26	2	1	3	27	65	11	10	14
Rivervue Academy	52	0	46	1	0	1	46	78	**	**	14
Rocky Mountain Middle School	77	0	19	0	1	3	20	51	**	**	19
Ross Elementary School	89	0	8	1	0	2	8	42	**	**	21
Salmon Junior-Senior High School	99	1	3	1	1	0	4	58	**	**	19
Silver Creek Alternative High School	70	0	27	3	0	0	27	68	**	**	9
The Atlas Alternative School	79	1	18	0	1	2	20	74	**	**	14
Three Creek School District	82	0	18	0	0	0	18	73	0	**	12
Union High School	49	0	46	1	2	2	48	85	**	**	13
Venture High School	81	0	7	2	4	5	11	76	**	**	8
Wilder School District	24	0	74	0	0	1	75	99	13	15	15

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix A: Idaho Funding (2013–14)

	Per Pupil Revenue				Per Pupil Expenditures			
	Total	Federal	State	Local	Total Current	Instructional	Student and Staff Supports	Administration
State	$7,505	$846	$4,806	$1,853	$6,872	$3,997	$666	$528
American Heritage Charter School	**	**	**	**	**	**	**	**
Central Academy High School*	**	**	**	**	**	**	**	**
Clark Fork Jr. and Sr. High School	**	**	**	**	**	**	**	**
Eagle Academy High School*	**	**	**	**	**	**	**	**
Indian Creek Elementary School	**	**	**	**	**	**	**	**
Initial Point Alternative High School	**	**	**	**	**	**	**	**
Kuna Middle School	**	**	**	**	**	**	**	**
Meadow Valley School District	$11,200	$1,500	$7,718	$1,982	$10,018	$6,282	$312	$294
Meridian Academy High School*	**	**	**	**	**	**	**	**
Meridian Technical Charter High School	**	**	**	**	**	**	**	**
Moscow School District	$9,802	$596	$4,471	$4,735	$8,487	$4,951	$986	$1,159
Nampa School District	$6,387	$892	$4,531	$964	$5,195	$3,122	$446	$542
North Valley Academy	**	**	**	**	**	**	**	**
Notus School District	$7,690	$842	$5,812	$1,036	$7,562	$4,573	$150	$908
Rivervue Academy	**	**	**	**	**	**	**	**
Rocky Mountain Middle School	**	**	**	**	**	**	**	**
Ross Elementary School	**	**	**	**	**	**	**	**

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Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
** Together, Central Academy High School, Eagle Academy High School, and Meridian Academy High School make up the West Ada Academy High Schools.*
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Note: Schools in participating districts may be phased in over time.

	Per Pupil Revenue				Per Pupil Expenditures			
	Total	Federal	State	Local	Total Current	Instructional	Student and Staff Supports	Administration
State	**$7,505**	**$846**	**$4,806**	**$1,853**	**$6,872**	**$3,997**	**$666**	**$528**
Salmon Junior-Senior High School	**	**	**	**	**	**	**	**
Silver Creek Alternative High School	**	**	**	**	**	**	**	**
The Atlas Alternative School	**	**	**	**	**	**	**	**
Three Creek School District	$15,000	$0	$12,222	$2,778	$14,889	$9,111	$0	$3,111
Union High School	**	**	**	**	**	**	**	**
Venture High School	**	**	**	**	**	**	**	**
Wilder School District	$10,397	$1,830	$5,460	$3,108	$7,608	$4,253	$314	$1,056

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix A: Idaho Student Outcomes

	Math Assessment (ISAT) Percent of Students Scoring Proficient and Above			Reading Assessment (ISAT) Percent of Students Scoring Proficient and Above			4-Year Cohort Graduation Rate		
	2015	2016	Change	2015	2016	Change	2014	2015	2016
State	**39**	**42**	**2**	**51**	**53**	**2**	**77**	**79**	**80**
American Heritage Charter School	55	49	-6	66	59	-8	**	**	**
Central Academy High School*	**	**	**	**	**	**	31	30	27
Clark Fork Jr. and Sr. High School	**	27	**	**	**	**	91	100	79
Eagle Academy High School*	**	**	**	**	**	**	43	33	34
Indian Creek Elementary School	52	50	-2	44	42	-2	**	**	**
Initial Point Alternative High School	**	**	**	**	**	**	76	58	82
Kuna Middle School	36	37	1	48	50	2	**	**	**
Meadow Valley School District	26	33	7	51	48	-3	**	82	85
Meridian Academy High School*	**	**	**	**	**	**	33	39	53
Meridian Technical Charter High School	**	**	**	**	**	**	98	96	100
Moscow School District	52	56	5	63	68	5	90	93	88
Nampa School District	29	32	3	43	46	4	77	84	80
North Valley Academy	25	24	-1	50	**	**	**	75	81
Notus School District	28	25	-3	39	31	-7	100	100	100
Rivervue Academy	**	**	**	**	**	**	**	**	**
Rocky Mountain Middle School	26	30	4	43	54	11	**	**	**
Ross Elementary School	23	24	1	34	36	1	**	**	**
Salmon Junior-Senior High School	**	26	**	70	53	-18	91	76	72
Silver Creek Alternative High School	**	**	**	**	**	**	62	58	50

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Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
** Together, Central Academy High School, Eagle Academy High School, and Meridian Academy High School make up the West Ada Academy High Schools.*
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Note: Schools in participating districts may be phased in over time.

	Math Assessment (ISAT) Percent of Students Scoring Proficient and Above			Reading Assessment (ISAT) Percent of Students Scoring Proficient and Above			4-Year Cohort Graduation Rate		
	2015	2016	Change	2015	2016	Change	2014	2015	2016
State	**39**	**42**	**2**	**51**	**53**	**2**	**77**	**79**	**80**
The Atlas Alternative School	**	**	**	**	**	**	40	43	33
Three Creek School District	**	**	**	**	**	**	**	**	**
Union High School	**	**	**	**	**	**	**	**	48
Venture High School	**	**	**	**	**	**	32	33	55
Wilder School District	9	8	-1	27	27	0	81	88	72

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix B: Utah Demographic Characteristics (2014-15)

Utah's Competency-Based Education Grants Program includes 12 diverse local education agencies from across the state.

	Total Enrollment											
	Number of Schools	Enrolled	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs
State		**635,577**	**481,132**	**8,263**	**104,235**	**20,338**	**6,991**	**13,983**	**119,488**	**234,767**	**38,538**	**75,428**
American Leadership Academy	1	1,721	1,216	24	413	25	4	39	441	668	134	**
Cache County School District	28	16,726	14,724	93	1,425	172	60	245	1,578	5,629	468	2,291
City Academy	1	229	145	9	52	7	1	15	62	96	7	**
Davis School District	90	70,857	59,830	862	6,555	1,809	338	1,456	7,755	15,878	1,963	8,188
Edith Bowen Lab School	1	304	251	3	26	14	2	8	31	93	7	**
Iron County School District	17	9,078	7,625	45	891	76	258	183	1,194	4,224	270	1,281
Juab School District	5	2,341	2,195	9	75	18	12	32	96	858	0	335
Logan City School District	9	6,169	4,000	83	1,619	288	87	92	1,789	3,590	674	854
Mountainville Academy	1	771	698	4	26	13	2	18	32	63	0	**
Park City School District	12	4,872	3,681	19	1,001	82	2	80	1,022	922	376	315
Rockwell Charter High School	1	445	396	6	28	5	5	5	39	146	0	**
South Summit School District	4	1,535	1,321	5	179	0	0	5	184	358	77	187
Spectrum Academy	2	982	858	10	67	16	1	30	78	275	0	**

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

	Percent Enrollment										Pupil/ Teacher Ratio
	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs	
State	**76**	**1**	**16**	**3**	**1**	**2**	**19**	**37**	**6**	**12**	
American Leadership Academy	71	1	24	1	0	2	26	39	8	**	**
Cache County School District	88	1	9	1	0	1	9	34	3	14	**
City Academy	63	4	23	3	0	7	27	42	3	**	**
Davis School District	84	1	9	3	0	2	11	22	3	12	**
Edith Bowen Lab School	83	1	9	5	1	3	10	31	2	**	**
Iron County School District	84	0	10	1	3	2	13	47	3	14	**
Juab School District	94	0	3	1	1	1	4	37	0	14	**
Logan City School District	65	1	26	5	1	1	29	58	11	14	**
Mountainville Academy	91	1	3	2	0	2	4	8	0	**	**
Park City School District	76	0	21	2	0	2	21	19	8	6	**
Rockwell Charter High School	89	1	6	1	1	1	9	33	0	**	**
South Summit School District	86	0	12	0	0	0	12	23	5	12	**
Spectrum Academy	87	1	7	2	0	3	8	28	0	**	**

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix B: Utah Funding 2013–14

	Per Pupil Revenue				Per Pupil Expenditures			
	Total	Federal	State	Local	Total Current	Instructional	Student and Staff Supports	Administration
State	**$7,843**	**$693**	**$4,274**	**$2,876**	**$6,546**	**$4,144**	**$490**	**$830**
American Leadership Academy	$5,675	$387	$4,660	$628	$5,752	$3,864	$784	$429
Cache County School District	$6,924	$567	$4,344	$2,013	$6,111	$3,976	$413	$482
City Academy	$7,606	$675	$6,165	$766	$10,247	$5,840	$740	$1,541
Davis School District	$7,146	$565	$4,048	$2,533	$6,250	$3,954	$461	$579
Edith Bowen Lab School	$8,069	$563	$6,125	$1,382	$7,905	$4,474	$1,447	$1,352
Iron County School District	$7,862	$742	$4,254	$2,866	$6,235	$4,021	$345	$573
Juab School District	$7,765	$582	$4,104	$3,079	$6,483	$4,136	$375	$615
Logan City School District	$8,056	$934	$4,227	$2,895	$7,349	$4,336	$564	$606
Mountainville Academy	$4,606	$164	$4,068	$373	$4,416	$3,142	$162	$841
Park City School District	$12,810	$343	$769	$11,698	$10,378	$6,185	$1,000	$1,261
Rockwell Charter High School	$7,077	$570	$6,023	$485	$7,938	$6,115	$346	$874
South Summit School District	$11,693	$486	$3,877	$7,329	$7,572	$4,793	$450	$972
Spectrum Academy	$9,536	$468	$8,633	$436	$9,469	$6,024	$1,276	$1,430

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
Note: Schools in participating districts may be phased in over time.

Appendix B: Utah Student Outcomes

	Math Assessment (SAGE): Percent of Students Scoring Proficient and Above				Reading Assessment (SAGE): Percent of Students Scoring Proficient and Above				4-Year Cohort Graduation Rate		
	2014	2015	2016	Change	2014	2015	2016	Change	2014	2015	2016
State	**39**	**45**	**47**	**7**	**42**	**44**	**44**	**2**	**83.0**	**84.0**	**85.0**
American Leadership Academy	36	38	41	5	35	36	41	6	83	82	92
Cache County School District	57	63	64	6	54	57	56	2	92	94	94
City Academy	20	28	19	0	25	30	39	14	70-89	59	73
Davis School District	44	49	53	9	47	49	51	4	91	93	94
Edith Bowen Lab School	50	77	81	31	55	64	68	14	**	**	**
Iron County School District	40	45	47	7	42	46	44	2	86	87	82
Juab School District	43	47	49	6	44	42	38	-6	92	96	97
Logan City School District	39	42	45	6	40	40	45	5	83	84	84
Mountainville Academy	47	38	46	-1	40	44	35	-4	**	**	**
Park City School District	52	56	55	2	57	59	54	-4	88	93	91
Rockwell Charter High School	18	18	20	2	22	23	19	-3	100	100	100
South Summit School District	44	53	52	8	56	58	57	1	90	88	91
Spectrum Academy	41	14	14	-27	36	14	15	-21	50-59	20-29	30

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix C: Florida Demographic Characteristics (2014-15)

Florida's five Competency-Based Education Pilot sites represent a diverse set of local education agencies across the state.

	Total Enrollment											
	Number of Schools	Enrolled	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs
State	**4,517**	**2,756,944**	**1,108,312**	**626,249**	**847,428**	**74,651**	**8,957**	**90,186**	**1,482,634**	**1,609,400**	**252,317**	**355,560**
Lake County School District	61	42,152	23,245	6,378	9,457	1,132	248	1,691	16,083	14,696	1,986	5,591
P.K Yonge Lab School at University of Florida	1	1,153	561	257	201	51	5	78	463	290	0	**
Palm Beach School District	286	186,605	62,205	53,342	58,847	5,689	1,354	5,168	113,543	105,771	21,153	28,904
Pinellas County School District	185	103,774	59,608	19,339	15,663	4,375	276	4,259	35,278	47,453	6,053	13,408
Seminole County School District	76	66,134	35,247	9,662	15,755	3,085	132	2,243	25,549	31,144	2,774	8,469

	Percent Enrollment										Pupil/ Teacher Ratio
	White	Black	Hispanic	Asian	Native American	More than 1 Race	Minority	Low-Income	ELL	Students with IEPs	
State	**40**	**23**	**31**	**3**	**0**	**3**	**54**	**58**	**9**	**13**	**15**
Lake County School District	55	15	22	3	1	4	38	35	5	13	17
P.K Yonge Lab School at University of Florida	49	22	17	4	0	7	40	25	0	**	13
Palm Beach School District	33	29	32	3	1	3	61	57	11	15	15
Pinellas County School District	57	19	15	4	0	4	34	46	6	15	15
Seminole County School District	53	15	24	5	0	3	39	47	4	13	13

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
*** Data unavailable*
Note: Schools in participating districts may be phased in over time.

Appendix C: Florida Funding 2013–14

	Per Pupil Revenue				Per Pupil Expenditures			
	Total	Federal	State	Local	Total Current	Instructional	Student and Staff Supports	Administration
State	**$9,518**	**$1,182**	**$3,986**	**$4,390**	**$8,955**	**$5,500**	**$949**	**$573**
Lake County School District	$8,608	$900	$4,281	$3,427	$7,835	$4,718	$836	$720
P.K Yonge Lab School at University of Florida	**	**	**	**	**	**	**	**
Palm Beach School District	$10,271	$1,007	$2,743	$6,522	$9,500	$6,070	$957	$759
Pinellas County School District	$9,485	$1,187	$3,260	$5,034	$9,080	$5,621	$866	$796
Seminole County School District	$8,843	$833	$4,180	$3,830	$8,074	$5,099	$705	$708

Appendix C: Florida Student Outcomes

	Math Assessment (FSA): Percent of Students Scoring Level 3 and Above				Reading Assessment (FSA): Percent of Students Scoring Level 3 and Above				4-Year Cohort Graduation Rate				
	2015	2016	2017	Change	2015	2016	2017	Change	2012	2013	2014	2015	2016
State	**56**	**57**	**59**	**3**	**52**	**52**	**54**	**2**	**75**	**76**	**76**	**78**	**81**
Lake County School District	53	55	57	4	49	49	51	2	78	78	77	76	78
P.K Yonge Lab School at University of Florida	64	67	67	3	71	68	67	-4	95	95	97	97	96
Palm Beach School District	58	60	61	3	53	53	54	1	77	76	78	79	82
Pinellas County School District	53	54	55	3	51	51	52	1	72	72	76	78	80
Seminole County School District	65	65	67	2	62	60	62	0	80	84	85	86	88

Source: Common Core of Data, National Center of Education Statistics, U.S. Dept. of Education
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Note: Schools in participating districts may be phased in over time.

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