

NASBE

Discussion Guide

National Association of State Boards of Education

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Blended Learning

Bringing Personalized Education to Scale



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Blended Learning: Bringing Personalized Education to Scale

by James F. Bogden



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This *Guide* was prepared with the expert advice and assistance of Dr. Lisa Duty, Partner at The Learning Accelerator and John Bailey, Executive Director of Digital Learning Now! with additional support from Susan Patrick, President and CEO of the International Association for K-12 Online Learning (iNACOL), and Dr. Allison Powell, Vice President for State and District Services, iNACOL.

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I. Introduction to Blended Learning

“Average is officially over.”

—Tom Friedman

“Old school” education involved moving lock-step through the grades, graduating from high school (probably), heading off to college (or not), and going out and finding a job. But “now, you will have to invent a job,” Tom Friedman writes. In this hyper-connected world, many, if not most, jobs in the new economy consist of creative thinking, problem solving, and non-routine work—and one cannot train for non-routine jobs in factory-style ways. This remains a challenge for the education system.

Today, state boards of education have an opportunity to exert leadership at encouraging, building support for, and overseeing the implementation of more personalized systems of education that can meet this challenge. A renewed vision of personalized education is being brought to life in many schools that use *blended learning* models. Blended learning is a term being used with increased frequency over the past 15 years that encompasses a variety of emerging instructional models that go well beyond the application of technology in the classroom. Blended learning requires a fundamental redesign of instruction with the goal of accelerating each student’s learning toward college and career readiness. Successful implementation of blended learning transforms the core elements of teaching and learning, including changing instructional roles, structures, schedules, staffing, and budgets.

This *Discussion Guide* is the latest in a series of NASBE reports over the past 15 years designed to help state education policymakers understand what is possible to accomplish with well-prepared educators using modern learning technologies, and what states can do to promote their best use. At the same time, this publication is truly pivotal. The stakes are higher, as Friedman and many others have pointed out, and the need to

bring out the best in every student is greater. But the transformative potential of blended learning will only be realized when we employ education technologies to reshape teachers’ and students’ roles, and when technology is coupled with fundamental organizational changes that re-engineer legacy school structures, processes, and all forms of instructional delivery. We must take every opportunity to work more productively and meet the individual needs of each student.

This guide is structured to facilitate discussion and decision-making on feasible state education goals and objectives to meet this challenge. It begins with a grounding in blended learning and its potential for personalized education, provides a sequence of action steps states can take (including examples of state efforts in these areas), and concludes with a series of worksheets that can guide policy discussions and help state boards ask the questions needed to bring high-quality blended learning opportunities to students across their state.

II. The Vision of Personalized Education

For many years, farsighted educational leaders have sought to make real the compelling vision of a school system in which master educators provide differentiated instruction that enables every student to achieve success. According to this vision, instruction that accommodates each student’s learning style and pace can inspire and challenge those students who are furthest ahead, while those students furthest behind can get the time and attention needed to succeed.

Though differentiated education has proven successful in some classrooms with master educators, *it has not been realized on a large scale across entire schools or districts*. In most cases, the traditional school system remains organized to provide a minimally adequate education to the largest number of students in the middle of the bell curve. As can be seen below, many policy and organizational attributes of the traditional system are not conducive to personalized education:

Blended learning opportunities have the ability to enhance education in a number of ways, including:

- Providing greater access to courses not available locally;
- Giving students the opportunity to progress through courses at their own pace but with the support they need to succeed;
- Giving students who are significantly behind in credits the opportunity to catch up with accelerated credit recovery options not typically available in a traditional setting;
- Linking students with teachers, experts, and peers from around the world to provide interactive learning experiences; and
- Using digital instructional materials that can provide immersive educational experiences.

— From *Born in Another Time: Ensuring Educational Technology Meets the Needs of Students Today, and Tomorrow. The report of NASBE 2012 Study Group on the Role of Technology in Schools and Communities*

- Students are grouped by age with little or no regard to individual strengths, learning styles, or interests;
- Teachers are expected to use specified curriculum frameworks and materials, working alone with few opportunities for collaboration with their colleagues;
- Knowledge expectations conform to narrow disciplinary boundaries;
- Learning expectations are frequently expressed in terms of classroom time, not the achievement of specific results;
- All students are tested at one time using standardized assessments designed for accountability purposes—“just-in-time” feedback is infrequent or missing; and
- Most students move through the system at the same pace.

Working alone in classrooms of age-grouped students, only the most exceptional teachers have had the talent, capacity, and energy to keep an entire class engaged in learning while helping individual students who are struggling to keep up. Far too many students become disengaged from learning and just go through the motions or drop out due to frustration or boredom.

What Is Blended Learning?

“Blended learning is a formal education program in which a student learns...

- 1) at least in part through online learning, with some element of student control over time, place, path, and/or pace;*
- 2) at least in part at a supervised brick-and-mortar location away from home; and*
- 3) the modalities along each student’s learning path within a course or subject are connected to provide an integrated learning experience.”*

—Clayton Christensen Institute for Disruptive Innovation

Rapid advances in hardware, instructional software, networking, communications, and the development of online courses have made global information easily accessible to students and teachers. Working within a blended learning model, instructors can engage and motivate each student to progress at his or her own pace through combinations of lecture, small-group work, online practice, guided exploration, project-based learning, individual tutoring, and more. Lessons can be tailored to each student’s pace, personal learning style, and interests. Ongoing and integrated

assessments allow students who quickly master specific required standards to sprint ahead or explore alternative applications of those standards, while those students having difficulty receive the individualized help they need to succeed.

iNACOL's New Learning Models Vision from the International Association for K-12 Online Learning (iNACOL) notes that the ultimate power of blended and online learning lies in their potential to transform the education system and enable higher levels of learning through competency-based approaches. Technology-based models can allow for rapid capture of student performance data and differentiated instruction tailored to the specific needs of individual students. By adapting instruction to reflect the skills and knowledge students have mastered, blended and online models have the potential to keep students engaged and supported as they learn and to help them progress at their own pace, leading to dramatically higher levels of learning and attainment.

Typically working in teams, teachers can share duties and collaborate to ensure that the necessary instructional resources and interventions reach the right students at the right time. Differentiating instruction to meet the needs of each student has long been a goal of public education, and blended learning offers a rich new set of tools and resources to accelerate that effort. Once teachers surmount the challenge of learning to apply their instructional skills in new ways, they typically report better connections with students, greater productivity, and enhanced job satisfaction.

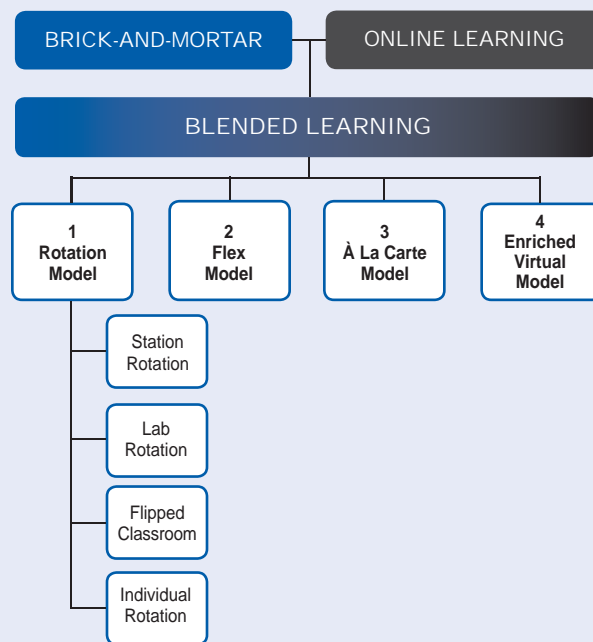
A Variety of Blended Learning Models

Innovative teams of teachers and principals across the nation have pioneered several new ways of organizing instruction through blended learning. Researchers generally classify these into four major models. The following descriptions of the four major models and chart 1 at right are adapted from “Blended Learning Model Definitions,” by the Clayton Christensen Institute for Disruptive Innovation.

1) Rotation Model — Within a given course or subject (e.g., math), students rotate between learning modalities, at least one of which is online learning. Other modalities might include activities such as small-group or full-class instruction, group projects, individual tutoring, and pencil-and-paper assignments. The Rotation model includes four sub-models:

- **Station Rotation**, where students move to different learning stations within a classroom. The rotation includes at least one station for online learning. Other stations might include activities such as small-group or full-class instruction, group projects, individual tutoring, and pencil-and-paper assignments.
- **Lab Rotation**, where a class of students move to different locations at a school, at least one of which is a learning lab for predominantly online learning, and the other(s) are classroom(s) for other learning modalities.
- **Flipped Classroom**, where students engage in face-to-face teacher-guided practice (or projects) on campus during the standard school day and change to online delivery of content and instruction of the same subject from a remote location (often home) after school. The primary delivery of content and instruction is online, which differentiates a Flipped Classroom from students who are merely doing homework practice online at night.
- **Individual Rotation**, where students rotate on an individually customized, fixed schedule among learning modalities, at least one of which is online learn-

Chart 1. Blended Learning Models



Adapted from “Blended Learning Model Definitions,” by the Clayton Christensen Institute for Disruptive Innovation.

ing. The Individual Rotation model differs from the other Rotation models because students do not necessarily rotate to each available station or modality.

2) Flex Model — A program in which the online learning is the backbone of student learning, even if it directs students to offline activities at times. Students move on an individually customized, fluid schedule among learning modalities, and the teacher-of-record is on-site. The teacher-of-record or other adults provide face-to-face support on a flexible, as-needed basis through activities such as small-group instruction, group projects, and individual tutoring. The amount of face-to-face support from teachers varies considerably across flex programs.

3) À La Carte Model — A program in which individual students take one or more courses entirely online with an online teacher-of-record and at the same time continue to have brick-and-mortar educational experiences. Students may take the online courses either on the brick-and-mortar campus or off-site. This differs from full-time online learning and the Enriched Virtual model because it is not a whole-school experience.

4) Enriched Virtual Model — A whole-school experience where in each course (e.g., math), students divide their time between attending a brick-and-mortar campus and learning remotely using online delivery of content and instruction. Many Enriched Virtual programs began as full-time online schools and then developed blended programs to provide students with brick-and-mortar school experiences. It differs from the À La Carte model because it is a whole-school experience, not a course-by-course model.

“The focus for student learning must shift from the lower half of Bloom’s Taxonomy of Learning (remembering, understanding, applying) to the upper half, which includes analyzing, evaluating, and creating....Learning teams must be essential components of the next generation learning culture....Educators need to be given the flexibility to use various forms of technology in the learning environment.”

—NASBE Study Group on Developing the 21st Century Educator (2010)

What Blended Learning Is Not

In recent months, there has been a burst of “one-to-one” initiatives, so named because each student is equipped with his/her own digital device. Various forms of laptop and tablet roll-outs, including bulk purchases and individual lease programs, as well as BYOD (bring your own device) strategies, have put powerful learning tools in the hands of an increasing share of K-12 students. These measures to increase students’ access to devices (and typically a robust Internet connection while at school) are a critical part of the blended learning equation. Providing a device and an Internet connection, however, should not by themselves be confused with implementing a blended learning model of education.

Education leaders have often been dismayed when expensive programs to establish computer labs, provide interactive whiteboards to teachers, or put laptops and tablets into the hands of every student are found to have only marginal effects on academic achievement. The real promise of blended learning is in using technology to rethink what teachers, students, and schools do, and how they are organized to do it. The fact is, digital technologies are of limited effectiveness in traditional schools where students are grouped by age and everyone navigates the same lessons in the same way at the same time. This is reminiscent of steam engines in wooden sailing ships, where the full advantages of modern propulsion technologies came to be realized only after the ships themselves were redesigned using new materials and the sailors were retrained to work in different ways.

Studies find that what makes a difference in student academic achievement is not how much technology is used in classrooms, but how it is used. Education leaders need to remember to focus on the end goal—personalizing student learning in order to increase student achievement. When blended learning is done well, technology fades into the background.

Blended learning is also sometimes confused with purely online models of school, also known as virtual schools or e-schools. For many students, an online education is a great option that serves them well. Online schools have provided valuable lessons and know-how even as blended learning models have moved to the fore. For the majority of students, however, attending school online full-time isn’t an option because custodial care is required or the temperament of the student is not compatible with so much self-direction. With blended learning, teachers and other adults can provide in-person supervision as well as maximize structure

“Education must break out of traditional seven-hour-a-day scheduling and its focus on the learning that takes place in a physical classroom in order not to ignore the ‘information at any time, any place’ mind set of students who grew up with the Internet.... Rather than being a tool that separates people from each other or just views students as ‘data,’ technology should serve as a 24/7 resource that helps educators and students connect to other communities of educators and learners, as well as to vast stores of resources and tools.”

—NASBE Study Group on the Structure of Schools (2010)

and direction for developmentally appropriate learning and socio-emotional growth. While it’s important to understand the difference between blended learning models and online schools, states should strive to provide multiple options for students, as choice is an important part of personalization at scale.

A Disruptive Innovation

The implications of personalized education at scale on the structure and organization of schools are profound. Blended learning is not just another school improvement strategy—it is a thorough transformation of teaching and learning methods across all curriculum areas. All aspects of the education system will be affected as educators shift their focus from delivering instruction to whole classrooms of students to targeting the learning needs of individual students. Classroom practice, school organization, families’ involvement with their children’s learning, staff preparation, staff deployment, procurement practices, the tasks of principals, the functions of district central offices, the role of state departments of education, and much else will inevitably undergo change as blended learning approaches are scaled up from pilot demonstration sites to become new norms in the provision of public education. Blended learning has been described as a “disruptive innovation,” a positive transformation of the education system designed to more conveniently provide personalized, world-class educational opportunities to every student by leveraging technology.

The experience of recent decades proves that restructuring the education system is a difficult, slow, incremental process. Even the development, adoption, and

implementation of challenging academic standards in core subject areas of math and literacy, generally considered to be a necessary (though not sufficient) foundation of an improved system, is taking an extraordinary amount of time and effort to achieve.

The thorough transformation of the education system’s infrastructure and policies to support blended learning at scale will also take time. However, the stakes of inaction are too high to take a wait-and-see approach. Blended learning requires advocacy and leadership from those state actors who are unwilling to accept another several years of tinkering. State board of education members (who are often in their positions longer than chief state school officers and governors) can accept the challenge to catalyze and support blended learning, set clear short and long term goals, and chart progress starting now.

The following section describes some of the action steps state boards can take to promote blended learning.

III. Key Leadership Tasks

1. Communicate a Compelling Vision

In many states, there may be an unfocused sense of urgency among state leaders as they understand the need to pursue a 21st vision for education that leverages technology, but do not share an understanding of what they are pursuing or how it should be achieved. Sometimes a variety of education technology initiatives are bundled together, muddying the vision and impeding collaborative planning. State boards of education can help focus that urgency into policy and implementation by establishing—and communicating—a clear vision for blended learning in the state.

A unified vision for blended learning should, first and foremost, address the desired outcomes for students—outcomes that are likely already expressed in the state board’s overall vision for education. Blended learning should enable all students to meet the demands of our global economy by mastering college and career ready standards as well as the non-cognitive skills required to thrive in the work place. Technology plays a vital role in personalizing education so all students can achieve their greatest potential against these standards. In this sense, technology enables personalized education, allowing states to achieve their vision.

A student-centered vision for blended learning allows the state to target specific populations of students who



For education leaders, taking the time to watch some or all of these or similar videos demonstrating blended learning is an important step in ensuring that everyone has a clear idea of what this learning model looks like on the ground—and what it means for students and educators.

- “What Is Blended Learning?” by The Learning Accelerator
- “Fundamentals of Blended Learning,” by Education Elements
- “Disrupting Class TEDxSF Talk,” by Michael Horn
- Lebanon High School, Manheim Central Middle School and Lancaster-Lebanon IU 13
- Kipp Empower Academy
- Carpe Diem, Summit Campus

have been unsuccessful or underserved by the traditional cohort model of public education. Students who have fallen behind their age peers are at risk of dropping out before they complete high school. Students who accelerate beyond the content available at their local school can stagnate and fall behind their peers in the national and global economy.

A vision that focuses on student outcomes is fundamentally different than a vision related to technology integration. The state vision for blended learning should allow the state to track its transition to that vision. In a state or district working toward technology integration, progress will be measured by the number of devices rolled out, regardless of how they are used. In a state working toward a vision of blended learning, progress will be measured in terms of student outcomes. A well-defined vision of blended learning will allow the state to pursue investments that align to the vision and eschew seemingly similar but less critical efforts.

The state’s vision for blended learning should clarify the role of educators in facilitating personalized, competency-based learning. In the abstract, educators may fear that blended learning is meant to supplant the role of teachers, replacing them with technology. It’s vital that states emphasize teacher-led blended learning, exploring the roles of each model in their state vision. Rather than supplant, technology will refine and enhance the role of skilled educators.

By design, blended learning models map students’ progress through academic content. Blended learning is fundamentally focused on individual student outcomes, and thus generates a rich portrait of the efficacy of blended learning models overall and with specific

student populations. Careful definition of a statewide vision for blended learning will ensure that effective models of blended learning that advance the state’s vision can be scaled-up while models with less promising results are curtailed.

While early results are very promising, blended learning is not a “one and done” innovation. Establishing a student-centered vision for blended learning will allow the state to make ongoing investments and recalibrate efforts over the years of the transition.

2. Build Support for a Shared Vision

As a vision for blended learning takes form, state school boards and other leaders must build broad understanding in and support for that vision. Ensuring the vision is student-focused will make it compelling to a much broader range of constituents than a vision focused narrowly on technology integration. Because the transition to blended learning will take years, the vision must be positioned to outlast the average tenure of most individual school, district, and state education leaders.

One of the most universally appealing components of a student-centered vision of blended learning is the promise of educational equity. Blended learning models aim to be an efficient and effective means of helping all students reach ambitious achievement goals, including disadvantaged students, English language learners, students in rural areas, accelerated students, and students with special needs. State education leaders can reach out to parent, policy, and advocacy organizations to obtain their support and to help their constituencies understand the goals and methods of blended learning.

Parents are already familiar with the demands of their “digital natives” who have grown up with an awareness and an integrated experience of technology. Many parents will recognize and applaud blended learning models that seek a balance between digital content delivery and active engagement with teachers and peers. Many other parents, unable to provide or to monitor device or Internet use at home, may welcome the guided access to high-impact uses of technology essential to success in college and careers.

State education leaders can draw media attention to early-adopter schools that are successfully implementing blended learning and can share lessons learned as they rapidly prototype these new forms of schooling. Site visits help stakeholders see the vision of personalized education in action and provide a morale boost to educators on the ground, even as such visits attract the press. Where site visits are not feasible, videos can help people understand how blended learning differs from traditional education. Successful schools can also be celebrated through public award programs, highlighted in newsletters, and be featured at education conferences. They can also be featured on the state department of education’s website.

It’s important to note that some districts, in addition to seeding blended schools, are taking action to redesign their systems in support of more personalized learning. For example, The Learning Accelerator’s (TLA) District Initiative brings blended learning solutions together with a small number of innovative school districts. TLA focuses on design, infrastructure, purchasing, software, finance, human capital, and communications. The blended learning implementation process, and the end state of a fully blended school district, can show other districts what such a system looks like and the steps required to achieve it. For example:

- The Reynoldsburg, Ohio school system, the first of TLA’s partnerships with “traditional” public school districts, is currently designing and implementing a new human capital recruitment system, securing nearly full budget autonomy for each school principal, and investing in innovation with a purpose. The district’s new Disruptive Innovation Investment Program is a school-level grant competition intended to foster blended learning across the district and further progress toward financially sustainable academic growth and achievement for all students.
- The Bill and Melinda Gates Foundation’s Next-Gen Systems Initiative is supporting districts in

designing and implementing personalized learning at scale in their schools. Gates approached the 200 largest districts in the country to participate, selected 20 teams for an initial design phase, and is in the process of selecting a subset of those teams to support through the next deeper phase of implementation.

- The Next Generation Learning Challenges’ (NGLC) Breakthrough Schools Regional Funds is another initiative supporting local schools. Initially focused on Washington, DC and Chicago, but now expanding to other areas through a grant program, NGLC is supporting local efforts to accelerate student achievement through personalized, mastery-based, blended learning models. Promoting local partnerships among districts, mayors’ offices, education innovators, philanthropies, and even state education agencies to advance this work is one of NGLC’s core objectives.

States can look at these and similar initiatives to help them locate early-adopter districts that align to the state’s vision for blended learning. Publicizing these models will empower a broad range of advocates to speak specifically and concretely about what blended learning is, and is not, in practice. Teachers can see for themselves the role educators can play, parents and students can reimagine how learning is structured, and leaders will have anecdotes and, over time, specific outcomes to bolster their advocacy for blended learning.

On the front lines of blended learning, many teachers are leading the transformation of classrooms and schools. Successful teachers within these environments have shifted their focus from instruction to impart content and skills to identifying learner-specific

“We know that when teachers ‘blend’ thoroughly evaluated technological resources with rigorous and directed instruction, students are more interested and motivated to learn. With this kind of teacher-focused instruction, students will be well prepared to contribute to society, make ethical choices, and better compete in a 21st century global economy.”

—NEA President Dennis Van Roekel

The TLA Blended Learning Educator Competency Framework



As part of its work to support district implementation of blended learning programs, The Learning Accelerator (TLA) developed a framework to help leaders and teachers better understand the competencies educators need to be effective in blended teaching and learning environments. The framework identifies four essential categories of educator competency: Mindset, Qualities, Adaptive Skills, and Technical Skills. Within each of these categories TLA found that the competencies essential to making blended learning work in schools very much overlap (~80-90%) with those that make educators successful in traditional environments (e.g., student management, data practices, content knowledge, and more). The framework is currently being translated into a set of standards to guide teacher practice through a partnership of TLA and the International Association for K-12 Online Learning (iNACOL).

Graphic courtesy of The Learning Accelerator.

approaches for mastery. While it's clear their role is changing, it is equally clear that teaching talent will remain the most important component of any successful blended school.

Both the National Education Association (NEA) and the American Federation of Teachers (AFT) support using blended learning instructional strategies under the direction of teachers. Dozens more advocacy groups and individual teachers endorse blended learning as well. Nevertheless, some teachers may be anxious about changing how they go about their daily routine.

Teachers without access to the necessary infrastructure will naturally question the reliability of communications networks and computer hardware required for blended learning. These are valid concerns that should be addressed through blended model development, implementation, and efforts aimed at continuous improvement. Educators need to be at the table helping identify the problems to be solved in their schools and the ways technology and organizational change can help—and should be front and center in making it work.

In order to build a comprehensive implementation plan for blended learning in a state, it is important to understand the school-level transformation and process by which both school and classroom leaders lay

the groundwork for introducing a new modality into their school culture. A valuable resource in this area is iNACOL's year-long case study with New York City schools, *Blended and Competency Learning—A Roadmap To Implementing Blended Learning at the School Level*. In this report, iNACOL identified six necessary elements for effective implementation of blended learning that would be helpful to state leaders.

Some education advocates are concerned that blended learning will be used as a strategy to save money by replacing teachers with technology. Legislators or others who promote blended learning as a staff-cutting measure may need to become better informed about the concept. Skilled, well-supported teachers are absolutely essential to a successful blended learning school. A major goal of blended learning is to improve teachers' effectiveness and empower them to better serve their students, not to replace them.

3. Oversee a Planning Process

It is not enough to have a few great models of blended learning schools. States need to create the conditions that will help them thrive. Currently there appears to be low capacity and capability across the board to support early adopters, even as the level of demand by educators for support in implementing blended learning is rapidly increasing.

“We need to get out there more and help [colleges of education] understand that there’s just no reason new teachers coming out of these programs should be without these skills [and strategies for effective online instruction].”

—Susan Patrick, president and CEO of the International Association for K-12 Online Learning (iNACOL)

Every state has its own unique set of implementation challenges to be addressed and overcome. In today’s tight fiscal environments, budget issues regarding technology infrastructure, staff professional development, and technical assistance programs may be challenging, but are not insurmountable. The state board of education may wish to create a standing commission of experts and stakeholders to study implementation issues in depth and across time as early adopters consolidate successful models and new waves of school leaders step up to further shape blended learning’s potential.

The Learning Accelerator (TLA) is one organization that actively supports state-level strategic planning. Its work with state boards of education, state education agencies, governors’ offices, and other statewide actors focuses on strengthening and supporting states’ capacity to catalyze and accelerate blended learning. TLA notes that efforts to impact implementation will need to be undergirded by an explicit roadmap and timeline as well as additional change management resources to help all stakeholders make the shift. States should consider using TLA’s Framework for Catalyzing and Accelerating Statewide Implementation of Blended Learning in order to understand and plan for the financial, technical, and human resources required to produce more personalized forms of learning.

This work will undoubtedly require a range of competencies, resources, and influence that can only be obtained from a broad coalition of actors across different agencies, elected memberships, organizations, sectors, and multi-stakeholder action networks. As opposed to most public committees or commissions that generally work together to issue recommendations and then disband, blended learning will require a group of state actors who will define and guide the state’s organizational priorities. These leaders will need the continuity and perspective to weigh tradeoffs, such as balancing support for motivated or nimble early adopters against efforts for systemic change. Just as blended models require schools and districts to think about and use their financial, technical, and human resources differently, a leading body of state actors should do the same.

Because traditional education systems are maintained through a complex web of interconnected policies, policy innovation is critical to supporting blended learning. *Keeping Pace with K-12 Online Learning: An Annual Review of Policy and Practice* (now in its tenth year of publication) is a testament to the growth and increasing importance of a new generation of online and blended learning state-level policies. States may wish to consult *Keeping Pace* as well as Digital Learning Now’s *2013 State Report Card* that outlines 10 critical elements of high-quality digital learning and actionable metrics associated with each. The report card, which examines each states’ progress toward the 10 elements, can serve as a valuable resource for state boards as they consider the policies that enable blended learning within their state.

4. Enable a Culture of Innovation in Schools

Flexibility is a key principle at this stage of the transition to blended models of education. Those who study the various blended learning models in depth emphasize that research into their effectiveness is still in its early stages. As there are no definitive conclusions about which particular models yield the best results under which circumstances, continuous prototyping and ongoing learning are critical.

Undertaking a Digital Learning Needs Assessment

A good first step in planning for blended learning is to conduct a needs assessment such as the one conducted in West Virginia and facilitated by the Alliance for Excellent Education. The report, *West Virginia Digital Learning: Report to the Governor, Legislature, and West Virginia Board of Education*, looks at readiness for digital and blended learning at two levels in West Virginia: building district capacity to ready the system for digital learning, and then school implementation of digital learning.

States should develop a plan for identifying, investing in, researching, and scaling promising models as part of a more systemic innovation agenda. States that offer working models of new practice are more likely to exert a positive influence on the system. State leadership can begin to encourage implementation in several ways:

★ **Statewide convening**—In 2012, 300 school leaders, teachers, legislators, and others gathered in Providence for a day-long conference spearheaded by the Rhode Island Department of Education (RIDE): “Innovation Powered by Technology.” Teachers left the conference with a sense of what they could begin to do in their own classrooms to further blended learning; principals had a chance to think about whole-school transformation; and superintendents heard about district-wide opportunities for change. This statewide event included a grant competition to seed Rhode Island’s first blended school and has since led to the development of several more blended models, a second convening, and a special event (sponsored by RIDE) that brought together educators with entrepreneurs to test educational technology products and offer constructive feedback. Momentum in Rhode Island is palpable.

★ **Third-party statewide technical assistance**—Building on the organization’s work with RIDE, the Highlander Institute received funding from The Learning Accelerator to build the institute’s capacity to provide support to schools and districts across Rhode Island by creating a technical and training assistance network. The resulting product, An Open-Source Model for a Statewide Blended Learning Consultation, could also help jumpstart action in other states.

★ **Grants**—States can offer competitive grants to schools and districts that would benefit from extra funding to offset costs of planning and technical assistance to transform how students learn and teachers teach. Grant applicants can be required to identify trade-offs that will allow for sustainability of the model after the grant funding ends. States may look to the Next Generation Learning Challenges (NGLC) framework as a guide to seed and support innovative new schools or even local sources of competition such as the Disruptive Innovation Investment Fund. While not exclusive to blended learning, the \$250 million dollar Ohio Straight-A-Fund is a good example of a large fund enabling unfettered innovation in Ohio’s public, chartered, and community schools.

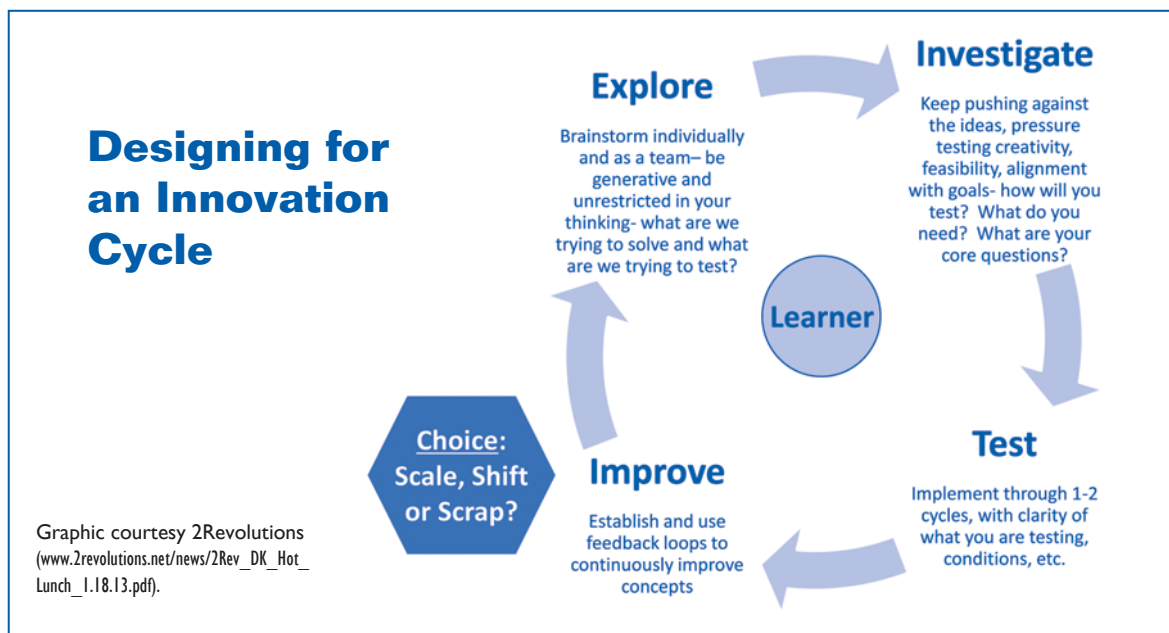
★ **Integration**—States can embed the adoption of blending learning as a competitive preference in initiatives through which funds are awarded to schools and

districts for varying purposes. For instance, K-3 reading programs, early literacy grants, or STEM grants could be shaped to include preferences for use of foundational blended learning strategies.

★ **Design support**—Grant applications developed exclusively by school or district staff can often be made stronger if the applicants have additional support from those experienced in design and with new blended learning models. States can build schools’ or districts’ capacity for high-quality design by offering resources to support the planning for, and the rapid prototyping of, blended learning. Relatively small investments can pay large dividends, as not every school is ready to build a new model early on, but many are equipped to begin experimenting with foundational blended learning strategies. Building schools’ capacity for design thinking over time as opposed to a one-time event is recommended. A good example of this is the initiative Building Colorado’s 3.0 System of Learning, sponsored by the Colorado Department of Education and Colorado Legacy Foundation in partnership with 2Revolutions, a national education design lab. Innovation networks were developed to help seed and grow a range of learning innovations in Colorado, as well as supporting movement toward blended and personalized professional learning networks.

★ **Networks**—The Colorado initiative mentioned above represents an outstanding networked approach to innovation. The Chief Council of State School Officers’ Innovation Lab Network (ILN) presents yet another opportunity for states and their districts to work together through a multistate collaborative. The ILN is a group of states taking action to identify, test, and implement student-centered approaches to learning. The goal of the ILN is to spur system-level change by scaling locally led innovation to widespread implementation, both within and across states, with a constant focus on student outcomes.

A good example of a ground-up approach to networked innovation is the newly minted Ohio Blended Learning Network (OBLN), comprising thirteen Ohio public schools and districts and facilitated by SmarterSchools, a nonprofit consulting organization created to help promote efficiency and effectiveness in education. OBLN believes that success happens when people believe their ideas are valued, when they trust that it is safe to express those ideas, and that this happens exponentially when risk is overseen collectively. OBLN’s network approach presents an opportunity to create a culture of innovation in Ohio that is broader and deeper than what might arise from the work of one exceptional district, a set of policy reforms, or mere programmatic efforts.



Zones and/or waivers—*Education Week* recently reported that a second wave of “innovation zones” was sweeping the country, with states and districts adopting policies to grant some public schools flexibility from some requirements, similar to those allowed for charter schools. Within these zones, many schools are embracing blended learning as a way to solve classroom challenges, leveraging ideas about school design with newly found flexibilities, and targeting some of the lowest-performing schools for transformation. A good example is found in the Kentucky Department of Education’s initiative, which chose four districts—Danville Independent, Eminence Independent, Jefferson County, and Taylor County schools—to receive innovation status in the 2013-14 school year.

State education leaders can consistently encourage and celebrate efforts at change. What educators sometimes need is “permission to fail”—that is, some assurance against being penalized if a carefully planned design does not achieve its intended results, if it morphs into unintended new forms, or is simply a reasonable strategy that doesn’t work in a particular context. The link between learning and innovation is strong, and acceleration matters. The faster we learn about blended learning in its current form, the faster we can apply that learning to create the next, or more effective, models.

IV. The Discussion Worksheets

The four worksheets that begin on page 14 are intended to guide discussions around the state action steps for blended learning that were outlined in this

guide. Included in each worksheet is a process for examining and inventorying current policies and a set of questions for boards to consider.

Prior to beginning these exercises, gathering the following information will help the state board use the worksheets more effectively:

- A brief inventory and general understanding of current policies related to educational technology in the state, including requirements for digital learning, educator preparation, and educational materials in digital formats;
- Challenges the state faces as it relates to blended learning, such as limited broadband width in some areas of the state or limited resources for technology; and
- An assessment of the strengths and limitations of the current policies that may affect blended learning, such as flexibility for local innovation or graduation requirements.

Through blended learning, schools have an opportunity to transform education to meet the personalized needs of all students while ensuring they are ready for tomorrow’s world. And state boards of education have a critical role to play in shaping the state’s vision, building a broad consensus for change, and overseeing the change process. The following worksheets will help state boards consider the issues in a structured and productive manner.

Worksheet 1: Developing a Shared Knowledge and Vision for Blended Learning

The shift to a transformed public education system in which every student learns challenging academic standards in ways customized to his/her own pace, learning style, and personal interests can be a powerful one. It is important that education leaders articulate a compelling vision for the type of learning our students need. While strategies and tactics are likely to differ across schools, and to evolve over time, a carefully articulated vision of blended learning can serve as a “North Star” for various actors pursuing alternative strategies within the same state.

Discussion Questions

- Are all students in our state mastering the knowledge and skills necessary for college and career readiness? (For example, being able to use learned material in new and concrete situations instead of just memorizing and comprehending it)?
- On average, what modes of learning are offered to students in the current system? How differentiated or personalized are they for different learners?
- What is the potential of the current learning environment to increase feedback to students and instructors? How much ownership do students have over their learning?

Together, view The Learning Accelerator’s 5-minute video, *What Is Blended Learning?* (<http://vimeo.com/78871778>) and other videos suggested in this guide.

- What are the most compelling reasons to build a system of blending learning?
- How will students advance through and graduate from our public schools?
- What can we learn from other states that are already addressing blended learning?
- How will our blended learning vision fit with the board’s overall vision for education in the state, and with the board’s (and department’s) strategic plan? (For example, How can blended learning support our state’s move toward competency-based education?)
- How will our state define blended learning?
- How will our state measure the success of blended learning efforts?
- What measures of scale will indicate we are moving aggressively toward blended learning in our state?
- Which schools or districts in the state can be held up as positive examples of blended learning and personalized education? What are the best means for highlighting their challenges and achievements?

Worksheet 2: Building Support for a Shared Vision

Shifting to a system of blended learning involves every stakeholder in the public education system: students, teachers, school leaders, families, college and business leaders, and members of the general public. Each major stakeholder group will need to invest in change. A multi-faceted engagement plan should involve a broad range of stakeholders in defining the plan and in building broad public support for the vision.

Collaboration Questions	Discussion Questions
<p><i>Who can help the board in engaging with essential stakeholders?</i></p> <p><i>Who can help with developing and implementing a communications plan?</i></p>	<ul style="list-style-type: none">● Which of the many stakeholders in your state are essential for developing and endorsing a vision for blended learning? We recommend you include (at least) the following constituent groups:<ul style="list-style-type: none">• Students• Parents/families• Community, faith, or advocacy groups• Teachers• Teachers professional groups• Principals/school leaders• Superintendents• School boards and local government• State leadership● For each constituent group, brainstorm answers for the following questions.<ul style="list-style-type: none">• How would a typical person in this group define “blended learning?”• What will excite the typical member of this group about blended learning as we have defined it in our state’s vision (Worksheet 1)?• What elements or implications of our state’s vision for blended learning will concern the typical member of this group?• How will we involve members of this group in understanding, contributing to, and advocating our state vision and plan for blended learning?

Worksheet 3: Overseeing a Planning Process

Given the sheer size of the task of transforming the education system—and the large number of interconnected areas of policy and practice that will need to be addressed—it is essential that state education leaders develop a step-by-step plan with carefully thought-out timelines to guide the effort.

Collaboration Questions	Discussion Questions
<p><i>Who else needs to be involved in this discussion?</i></p> <p><i>Which state actors can generate and drive an agenda that identifies and advocates for policies that support blended learning at a district scale?</i></p> <p><i>What assistance (from within or outside the state) is available to help with implementation at both the state and local levels?</i></p>	<p><i>Thought Partnership:</i></p> <ul style="list-style-type: none"> ● Who has the expertise, time, and willingness to guide and support our state’s shift to blended learning at the state level? ● What qualities are important to us when contemplating thought partners? ● What evidence would constitute an alignment of our visions for moving forward? <p><i>Policy Planning:</i></p> <ul style="list-style-type: none"> ● What models of blended learning exist in the state? Are there promising whole school models or district-wide models? ● What policy barriers exist that inhibit the success or scaling-up of these early-adopters? ● What related policy and program areas will be important to consider to ensure successful realization of blended learning across the state (e.g., educator preparation and professional learning; quality control for online learning and digital materials; autonomy at the school level (perhaps through a charter district approach); online learning graduation requirements). <p><i>Implementation Planning:</i></p> <ul style="list-style-type: none"> ● Which schools or districts are interested in implementing blended learning models? What do these districts need? ● Which state actors can assess the needs and readiness of school districts? Which state actors can establish a plan that identifies and secures technical capacity and planning support for proof point districts within the state?

Worksheet 3: Overseeing a Planning Process (continued)

Collaboration Questions	Discussion Questions
<p><i>Which state actors will gauge the state's progress toward the established vision and interim benchmarks?</i></p>	<p><i>Progress and Success:</i></p> <ul style="list-style-type: none">● How will the state gauge progress towards the vision established for blended learning (Worksheet 1)? What measures of success will indicate the state is progressing toward our established vision? <p><i>Establishing a Plan:</i></p> <ul style="list-style-type: none">● What is a reasonable timeframe for developing each of the components of the plan laid out above?● Who will manage the development of each of the components of the plan?● What trade-offs will be made in order to adequately fund the plan?

Worksheet 4: Enabling a Culture of Innovation in Schools

There is no single roadmap for how to transform all schools or districts to take advantage of emerging models of blended learning. Flexibility, local planning, and regular course-corrections will be essential for any successful blended learning program. Contrary to a traditional mode of collaboration that involves initial goal setting and then compliance and accountability along a defined execution path, teachers, leaders, organizations, and private partnerships will need to form flexible teams that can learn rapidly and make necessary course corrections. Teams will need to agree on the vision and a set of outcomes for blended learning without being able to define the specific steps that will take them there. State education leaders need to encourage experimentation—which means making rapid failure and learning a vital part of our experiences (“Fail forward, faster”).

Discussion Questions

- When have you been involved in a project where the vision is clear, but the path to achieve that vision is unclear? How did people collaborate successfully?
- Which elements of local school design are currently under local school control versus dictated by a district or state (e.g., calendar, time allocation, course requirements, assessments)? What freedoms or exemptions from these regulations will enable schools to pursue blended learning models?
- What opportunities for collaboration, planning, and funding exist (both in and outside the state) to support districts or schools in implementing blended learning models? What additional opportunities are needed and which state actors can foster them?
- What parameters for experimentation will be established that will allow well-planned attempts at innovation to fail without penalty? How will unanticipated failures be documented?
- How can the state model an innovation-driven, continuous improvement plan for blended learning while still ensuring overall quality?

Resources

Following are some key resources for policymakers that were used in the preparation of the guide:

- “What Role Should States Play in the Shift to Personalized Learning?” by Lisa Duty and Tom Vander Ark (*Education Week*, November 14, 2013), available at http://blogs.edweek.org/edweek/on_innovation/2013/11/what_role_should_states_play_in_the_shift_to_personalized_learning.html.
- *Blended Learning Implementation Guide, Version 2.0*, by John Bailey, Nathan Martin, Carri Schneider, Tom Vander Ark, Lisa Duty, Scott Ellis, Daniel Owens, Beth Rabbitt, and Alex Terman (Digital Learning Now, September 2013), available at www.digitalllearningnow.com/dln-smart-series.
- *Digital Learning Report Card 2013* (Digital Learning Now, 2014), available at http://reportcard.digitalllearningnow.com/wp-content/uploads/2014/02/DLN_ReportCard_20140313.pdf.
- *West Virginia Digital Learning: Report to the Governor, Legislature, and West Virginia Board of Education* (Alliance for Excellent Education, 2014), available at <http://all4ed.org/reports-factsheets/west-virginia-digital-learning-report-to-the-governor-legislature-and-west-virginia-board-of-education/>.

- *Technology Counts 2012: Virtual Shift—E-learning Turns toward District-level Approaches and a Focus on Accountability* (Education Week, March 2012), available at www.edweek.org/ew/toc/2012/03/15/index.html.
- *Blended Learning* (National Education Association Policy Brief, 2011), available at www.nea.org/home/49397.htm.
- “School Districts Embrace Second Generation of ‘Innovation Zones,’” by Katie Ash (*Education Week*, February 18, 2014), available at http://www.edweek.org/ew/articles/2014/02/19/21innovation_ep.h33.html.
- *Convening Rhode Island Around Digital Learning: An Education Case Study*, by Meg Evans (Innosight Institute, June 2012), available at <http://www.innosightinstitute.org/innosight/wp-content/uploads/2012/07/Convening-Rhode-Island-around-digital-learning.pdf>.
- *From Policy to Practice: How Competency-Based Education Is Evolving in New Hampshire*, by Julia Freeland (Clayton Christensen Institute for Disruptive Education, May 2014), available at <http://www.christenseninstitute.org/wp-content/uploads/2014/05/From-policy-to-practice.pdf>.
- *Building Colorado’s 3.0 System of Learning* (2Revolutions), available at <http://www.2revolutions.net/the-work/building-colorado-3.0-system-of-learning.html>.
- “Rhode Island Tech for Schools Summit,” (ed-Surge, 2013), available at <https://www.edsurge.com/rhode-island-tech-for-schools-summit>.
- “Innovation Lab Network,” overview (Council of Chief State School Officers), available at http://www.ccsso.org/What_We_Do/Innovation_Lab_Network.html.
- “Barber on the Future of Education,” by Tom Vander Ark (*Getting Smart*, March 2014), available at <http://gettingsmart.com/2014/03/barber-future-education/>. This article discusses the report, *The New Opportunity to Lead: A Vision for Education in Massachusetts in the Next 20 Years*, by Michael Barber (Massachusetts Business Alliance for Education, March 2014), available at <http://www.mbae.org/new-report-offers-a-vision-for-education-in-the-next-20-years/>.
- “How to Use Technology in Education,” by Frederick Hess and Bror Saxberg, in *Larry Cuban on School Reform and Classroom Practice* (blog posting, December 22, 2013), available at <http://larrycuban.wordpress.com/2013/12/22/how-to-use-technology-in-education-frederick-hess-and-bror-saxberg/>.
- “Scale What?” by Scott Benson (iPersonalize blog, February 5, 2014), available at <http://ipersonalize.org/2014/02/05/scale-what/>.
- “Straight A Fund,” overview (Ohio Department of Education), available at <http://education.ohio.gov/Topics/Straight-A-Fund>.
- “At Becker Speech, Friedman Says ‘Average Is Officially Over’ in Hyperconnected World,” by Steven H. Foskett, Jr. (*Telegram*, April 9, 2014), available at <http://www.telegram.com/article/20140409/NEWS/304099865/1003/NEWS03>.
- *Keeping Pace with K-12 Online and Blended Learning: An Annual Review of Policy and Practice* (Evergreen Education Group, 2013), available at <http://www.kpk12.com>.
- *iNACOL’s New Learning Models Vision* (iNACOL, October 2013), available at <http://www.inacol.org/cms/wp-content/uploads/2013/11/iNACOL-New-Learning-Models-Vision-October-2013.pdf>.
- *Mean What You Say: Defining and Integrating Personalized, Blended, and Competency Learning*, by Susan Patrick, Kathryn Kennedy, and Allison Powell (International Association for Online K-12 Learning, 2013), available at <http://www.inacol.org/cms/wp-content/uploads/2013/10/iNACOL-Mean-What-You-Say-October-2013.pdf>.
- *RETHINK: Planning and Designing for K-12 Next Generation Learning*, by Dave Edwards (iNACOL and Next Generation Learning Challenges), available at <http://www.educause.edu/library/resources/rethink-planning-and-designing-k-12-next-generation-learning>
- *Blended and Competency Education, A Roadmap for Implementation of Blended Learning at the School Level: A Case Study of the iLearnNYC Lab Schools*, by R. Darrow, B. Friend, and A. Powell (iNACOL, October, 2013), available at http://www.inacol.org/cms/wp-content/uploads/2014/01/iNACOL_iLearnNYC_Case_Study_October2013.pdf.
- “Investing in Autonomy, Performance, and Innovation,” by Lisa Duty; guest blog in Vander Ark on Innovation (*Education Week*, April 14, 2014), available at http://blogs.edweek.org/edweek/on_innovation/2014/04/_most_districts_put_innovation.html
- “Could Local Innovation Networks Be a Key to Adopting Blended Learning?” by Lisa Duty (April 3, 2014), available at <http://www.christenseninstitute.org/could-local-innovation-networks-be-a-key-to-adopting-blended-learning/>.



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2121 Crystal Drive, Suite 350
Arlington, Virginia 22202
703.684.4000
www.nasbe.org

